




PHILIPPINE TAX ACADEMY

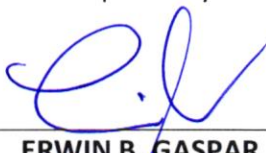
CITIZEN'S CHARTER

2026 (1st edition)

	PHILIPPINE TAX ACADEMY		
	CITIZEN'S CHARTER		
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REVISION HISTORY		
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FOREWORD

The Philippine Tax Academy (PTA) is a specialized learning institution mandated to deliver relevant, responsive, and high-quality education programs, training courses, and capability-building initiatives for government tax collectors and administrators, particularly officials and personnel of the Bureau of Internal Revenue (BIR), Bureau of Customs (BOC), and Bureau of Local Government Finance (BLGF), including local treasurers, as well as local assessors and local officials and staff involved in the implementation of Republic Act No. 12001, or the Real Property Valuation and Assessment Reform Act, and selected participants from the private sector. As the country's premier institution dedicated to tax education, the PTA plays a vital role in strengthening the competence, professionalism, and integrity of revenue officers and tax administrators. Through comprehensive and competency-based learning interventions, the Academy enhances technical expertise, reinforces ethical standards, and contributes meaningfully to the government's revenue generation efforts in support of sustainable nation-building and inclusive economic growth.

In its continuing pursuit of excellence and steadfast vision of becoming a world-class tax academy, the PTA presents its Citizen's Charter to its internal and external stakeholders. This document serves not only as a guide to the Academy's services but also as a public declaration of its commitment to transparency, accountability, efficiency, and client-centered service. It clearly articulates the standards of performance that stakeholders may expect and defines the responsibilities of both the service providers and the clients to ensure smooth and timely transactions.

The Citizen's Charter comprehensively outlines the PTA's key frontline and support services, including the step-by-step procedures for availing of these services, documentary requirements, applicable fees, processing times, and the offices or personnel responsible for each transaction. It also provides information on feedback mechanisms and avenues for redress to further promote responsiveness and continuous service enhancement.



By making this information readily accessible and understandable, the PTA reinforces its dedication to professionalism, service excellence, and good governance. Ultimately, the Citizen's Charter stands as a testament to the Academy's resolve to deliver quality public service and to foster trust and confidence among its stakeholders.

GIL S. BELTRAN
President



AGENCY PROFILE

I. MANDATE

The Philippine Tax Academy (PTA) is a specialized institution created under Republic Act No. 10143 and mandated to train, mold, enhance, and develop capabilities of tax collectors and administrators to help improve their tax collection efficiency to become competent and effective public servants.

Section 4 of Republic Act No. 10143 s. 2010 created the Philippine Tax Academy for the following purposes:

- Serve as a learning institution for tax collectors and administrators of the government and selected applicants from the private sector;
- Provide all training, continuing education programs, and other courses for all officials and personnel of the Bureau of Internal Revenue, Bureau of Customs, and Bureau of Local Government Finance including local treasurers;
- Develop and implement a curriculum which includes those pertaining to:
 - technical aspects of tax collection, administration, and compliance; and
 - career orientation and development for all civil servants; and
- Conduct lectures, seminars, workshops, and other training programs designed to mold, develop, and enhance skills and knowledge, moral fitness, efficiency and capability of tax collectors and administrators.

Additionally, according to Section 21 of Republic Act No. 12001 or the Real Property Valuation and Assessment Reform Act, the PTA shall develop and conduct the necessary trainings for all local assessors, local officials and staff, and other concerned personnel on the preparation of the schedule of market values (SMVs).



II. VISION

By 2028, a world-class tax academy transforming institutions on tax, customs, and public finance administration towards nation-building through professionalization of revenue employees.

III. MISSION

A specialized institution that elevates competency and integrity of tax and customs collectors and administrators towards efficient tax collection.

IV. CORE VALUES

The PTA will be guided by the core values in all its internal and external activities:

Husay (Excellence/Competence) – To deliver the best possible service to our learners, we must be driven by excellence and competence, which we do by enhancing our employees' behavioral and academic expertise.

Giting (Valor/Patriotism) – To become catalysts, we practice valor and patriotism as the foundation and motivation as we do our service.

Puso (Compassion) – To be customer-centric, we make sure that our services are driven by compassion and empathy.

Katapatan (Integrity) – To build public trust, we demonstrate integrity across our services through decency, honesty, fairness, and impartiality in all interactions



V. SERVICE PLEDGE

We, the Officials and Employees of the Philippine Tax Academy, affirm our commitment to service excellence and as a specialized learning institution, do hereby pledge to:

Provide continuing education programs and trainings to tax collectors and administrators to support the government's revenue efforts towards nation-building;

Facilitate faithful and ethical compliance with tax laws, rules and regulations by professionalizing the employees of the government revenue agencies and learners of the PTA;

Perform our duties to the best of our abilities and observe prudence and transparency in all transactions to achieve customer satisfaction;

Lead modest lives appropriate to our position and income, and defend public interest over and above personal interest;

Uphold the time-honored principle that, "PUBLIC OFFICE IS A PUBLIC TRUST," by serving our learners, with the highest degree of professionalism, integrity, competence, and compassion.

Pursue our mandates objectively to attain excellent public service and good governance gearing towards the realization of our vision-mission.

So Help Us God



PTA LIST OF SERVICES

I. EXTERNAL SERVICES



1. Action Taken on Business Correspondence

Business correspondence or written communications received at the Office of the President (OP) through the PTA office, website, and email accounts shall be promptly acknowledged and responded thereto.	
Office / Division:	Office of the President/Concerned Institute or Division
Classification:	Simple
Type of Transaction:	Government to Government (G2G) Government to Business (G2B) Government to Citizen (G2C)
Who may avail:	BIR, BOC, BLGF, Local Treasurers and Assessors, Private Sector, and Individuals

Checklist of requirements:	Where to secure:
Official Letters / Correspondences	Requesting party
Official Email	Requesting party

Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
1. Send business correspondence or written communication.	1.1 Receive and acknowledge business correspondence.	None	20 Minutes	Head Executive Assistant, Office of the President (OP) Executive Assistant (EA), OP/Central Records Public Relations Officer (PRO) IV/ Development Management Officer (DMO) III, Planning,



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
				Communications, and Quality Assurance Division (PCQAD)
	1.2 Print and log the business correspondence in the Official Logbook.	None	20 Minutes	EA, OP/Central Records PRO IV/ DMO III, PCQAD
	1.3 Forward the business correspondence to the institute/ division concerned, if applicable.	None	1 Hour	EA, OP/Central Records PRO IV/ DMO III, PCQAD
	1.4 Receive the letter together with the attached documents.	None	1 Day	Concerned Institute/ Division
	1.5 Prepare a letter of response based on the nature of request.	None	1 Day	Concerned Institute/ Division
	1.6 Send the letter response to the requesting party.	None	20 Minutes	Concerned Institute/ Division
2. Receive the letter response.	2.1 Acknowledge the receipt of	None	5 Minutes	Requesting Party



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
	the letter response.			
TOTAL		None	2 Days, 2 Hours, and 5 Minutes	



2. Processing of Payment to Supplier of Goods and Services

In compliance with the government accounting and auditing rules and regulations, the Philippine Tax Academy through its Finance Management Division (FMD) facilitates the payment to suppliers who completely delivered/rendered goods/services as stipulated in the approved and accepted Notice to Proceed (NTP) / Contract / Agreement.

Office / Division:	FMD
Classification:	Complex
Type of Transaction:	Government to Government (G2G) Government to Business (G2B) Government to Citizen (G2C)
Who may avail:	Government Agencies, Private Sector, Individuals

Checklist of requirements:	Where to secure:
For Goods: Delivery Receipt (1 original copy) Sales Invoice (1 original copy)	Requesting Party
For Services: Billing Statement / Statement of Account (1 original copy)	Requesting Party
	Finance Management Division

Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
1. Submit the following: For Goods: Delivery Receipt Sales Invoice For Services: Billing	1.1 Receive the original copy of Billing Statement and check the supporting documents, whether it is included in the APP; if	None	4 Hours	Senior Finance Specialist (SFS), Finance Management Division (FMD)



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
Statement / Statement of Account Conformed Letter	complete with supporting documents, stamps received the documents.			
	1.2 Prepare Obligation Request and Status (ORS), record transaction in control logbook and post the details to the monitoring ledgers.	None	4 Hours	SFS, FMD
	1.3 Review the ORS, check if it is posted in the right Expense Item, and initial the ORS.	None	4 Hours	A3, FMD
	1.4 Review the ORS and attachments	None	4 Hours	CA, FMD
	1.5 Transmit of Documents to Records Officer.	None	10 Minutes	SFS, FMD
	1.6 Review and initial of documents	None	3 Hours	Director IV, RMG
	1.7 Review and sign ORS (Box b)	None	4 Hours	Director, RMG/ Chancellor, Institutes/ President, OP



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
	1.8 Transmit to the Records Officer, record the signed ORS.	None	10 Minutes	SFS, FMD
	1.9 Transmit to the Senior Budget Specialist or end user for the preparation of Voucher.	None	10 Minutes	Records Officer (RO) II, OP
	1.10 Prepare Disbursement Voucher (DV) and record transaction in index of payments, monitoring ledgers and subsidiary ledgers.	None	4 Hours	SBS, FMD
	1.11 Prepare BIR Form 2307	None	3 Hours	SFS, FMD
	1.12 Review, check if properly posted in the monitoring and subsidiary ledgers, deducted from the cash books, ensure that journal entries are proper, and	None	4 Hours	A3, FMD



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
	sign the DV.			
	1.13 Review and ensure the completeness and accuracy of the claims	None	4 Hours	CA, FMD
	1.14 Transmit of Documents to the Office of the Director, RMG (for initial)	None	10 Minutes	SBS, FMD
	1.15 Review and initial of documents prior to the approval of DV.	None	3 Hours	Director IV, RMG
	1.16 Review and sign box A of DV	None	4 Hours	Chancellor, Institutes/ Director, RMG
	1.17 Review and approve documents (Office of the President).	None	3 Hours	President, OP
	1.18 Transmit to the Cashier signed DV.	None	10 Minutes	EA, OP
	1.19 Prepares and signs LA	None	4 Hours	Cashier, GSD
	1.20 Transmit to OP for Approval	None	10 Minutes	EA, OP
	1.21 Approve the LA	None	5 Minutes	President, OP
	1.22 Transmit to Cashier	None	10 Minutes	Cashier, GSD



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
	1.23 Transmit to Bank	None	10 Minutes	SA, GSD
TOTAL		None	6 Days, 5 Hours, and 25 Minutes	



3. Processing of Training Request

The Philippine Tax Academy (PTA) offers training courses and programs such as Mandatory, Specialized, Executive, Continuing Professional Development (CPD) courses, among others, that are designed responsive to the needs of its clients and stakeholders. An individual or an organization submits a request for training to be conducted. A clear explanation of why the training is necessary, including the skills or knowledge gaps that the training aims to address are stated in the request. The specific details and format of a training request can vary depending on the organization.

Office / Division:	Internal Revenue Institute (IRI), Customs Institute (CI), and Local Government Finance Institute (LGFI)
Classification:	Simple
Type of Transaction:	Government to Government (G2G) Government to Business (G2B) Government to Citizen (G2C)
Who may avail:	BIR, BOC, BLGF, Local Treasurers and Assessors, Private Sector, and Individuals

Checklist of requirements:	Where to secure:
1. Formal letter of request indicating the following: <ul style="list-style-type: none"> a. Training needs to be addressed or suggested topics for the training b. Number and profile of target participants c. Email address of participants d. Preferred venue e. Proposed schedule f. Name of agency, address, contact number g. Name and position of contact / focal person h. Training Modality 	Requesting Party
2. Contact number and email address of target learners	Requesting party



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
1. Submit a letter of request. <i>(Addressed to the Head of Agency)</i>	1.1 Acknowledge receipt of letter.	None	5 Minutes	Requesting party Head Executive Assistant, Office of the President (OP) Executive Assistant (EA), OP/Central Records
	1.2 Review the request and forward to concerned Institute	None	7 Hours	Executive Assistant (EA), OP/Central Records IRI/ CI/ LGFI
	1.3 Receive the letter request	None	5 Minutes	Chancellor/ Vice Chancellor/ Training Specialist III, IRI/ CI/ LGFI
	1.4 Review the request to determine its propriety. If the request is compliant with the required information, recommend for	None	1 day	Chancellor/ Vice Chancellor/ Training Specialist III, IRI/ CI/ LGFI



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
	acceptance. If not, inform the requesting party of the lacking/ needed information or disapproval of the request.			
	1.5 Approve/reject the request.	None	50 Minutes	Chancellor, IRI/ CI/ LGFI
	1.6 Send the decision / action taken on the request.	None	10 Minutes	Chancellor/ Vice Chancellor/ Training Specialist III, IRI/ CI/ LGFI
2. Receive the response letter/ correspondence from the Institute	2.1 Records the letter and encode to the document tracking system	None	10 Minutes	Training Specialist III, IRI/ CI/ LGFI
TOTAL		None	2 Days and 20 Minutes	



4. Request for Certified True Copy of Training Certificate

Training participants may request for certified true copies of certificates for trainings attended with the Philippine Tax Academy (PTA) through in-person or online modality.

Office / Division:	Human Resource Management Division (HRMD) / Learning and Development Division
Classification:	Simple
Type of Transaction:	Government to Government (G2G) Government to Business (G2B) Government to Citizen (G2C)
Who may avail:	BIR, BOC, BLGF, Local Treasurers and Assessors, Private Sector, and Individuals

Checklist of requirements:	Where to secure:
1. Email request for certified true copy of training certificate	Requesting Party
2. Duly accomplished Request Form	HRMD/ LDD

Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
1. Send an email request for certified true copy of training certificate to ldd@doftaxacademy.gov.ph or duly accomplished Request Form indicating the title and date	1.1 Receive and validate details indicated on the request.	None	1 day	Acting Registrar, Learning and Development Division (LDD)



Client Steps	Agency Action	Fees to be Paid	Processing Time	Person Responsible
of training.				
	1.2 Prepare the certified true copy of training certificate.	None	2 Hours	Learning and Development Specialist (LDS), LDD
	1.3 Review and sign the certified true copy of training certificate.	None	2 Hours	Acting Registrar, LDD
	1.4 Issue the certified true copy of training certificate to the requesting party.	None	10 Minutes	LDS, LDD
2. Claim the certified true copy of the training certificate.	2.1 Register the receipt in the logbook.	None	30 Minutes	LDS, LDD Requesting Party
TOTAL		None	1 Day, 4 Hours, and 40 Minutes	



II. INTERNAL SERVICES