# USER GUIDE

myPATH
PENNSYLVANIA TAX HUB

LAST UPDATED OCTOBER 2021

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# Introduction to myPATH

myPATH stands for *my Pennsylvania Tax Hub* and is the portal that external customers can use to easily interact with the department. This new portal has replaced PIT e-Services, sometimes referred to as the PIT Portal, as well as, PAdirectfile. myPATH provides many self-service options such as the ability to register an account, file returns, pay balances, and manage your account online.

Users are also able to review correspondence received from the department, submit correspondence, and communicate electronically with department representatives. Keep in mind that a user may need to be logged in to perform some functions while other functions are available directly on the myPATH homepage (non-logged in).

## WHAT TAX TYPES & PROGRAMS ARE IN MYPATH?

As we continue to integrate tax types and programs into our new system, PATH, they are also integrated into the myPATH portal. Please refer to the chart below to see what taxes and programs are available through the portal:

| Rollout 1 | Rollout 2 | Rollout 3 |
|---|---|---|
| • Alternative Fuels Tax<br>• Motor Fuels Tax<br>• International Fuel Tax (IFTA)<br>• Motor Carrier Road Tax (MCRT)<br>• Fuel Transporter | • Inheritance Tax<br>• Realty Transfer Tax<br>• Medical Marijuana Tax | • Personal Income Tax<br>• Property Tax/Rent Rebate<br>• Pass-Through Entity |

## CAPABILITIES BY TAX TYPE

| Tax/Program Type | File Returns & Reports | Check Status | Remit Payments | Register New Account | Apply for & Renew Permits | View Notices & Submit Correspondence | Penalty & Interest Calculator |
|---|---|---|---|---|---|---|---|
| Alternative Fuels | X | | X | X | X | X | X |
| Fuel Transporter | X | | X | X | X | X | |
| Inheritance Tax | X* | X | X** | | | X | X |
| International Fuel Tax | X | | X | X | X | X | |
| Medical Marijuana Tax | X | | X | | | X | |
| Motor Carrier Road Tax | | | X | X | X | X | |
| Motor Fuels Tax | X | | X | X | X | X | X |
| Pass-Through Entity | | X | X*** | | | X | |
| Personal Income Tax | X | X | X | | | X | X |
| Property Tax Rent Rebate | X | X | X | | | X | |
| Realty Transfer Tax | X | | X | | | X | X |

*REV-1500, Inheritance Tax Return and REV-1737A, Inheritance Tax Return Nonresident Decedent cannot be submitted via myPATH. To file, follow form instructions.

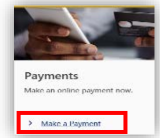
**Only payments for nonresidents can be made via myPATH. Residents must file and pay with the Register of Wills.

*** Estimated and extension payments for Personal Income Tax only.

# Homepage Features - Payments

All customers have access to many payment options available directly from the myPATH homepage without the need to create a myPATH profile. However, users with a myPATH profile can enjoy additional features not available to those without a myPATH profile.

Use the options within the Payments panel to do the following:




- **Make a Payment** – remit bill, estimated/extension, return, & garnishment/bank attachment payments
- **Track Payments & Credits** – track estimated and extension payments, as well as carry forward credits
- **Penalty & Interest Calculator** – determine if penalty or interest may be owed

## MAKE A PAYMENT WITHOUT CREATING A PROFILE

### PAY MY BILL

- **PAY MY BILL** – submit a payment for any of the following:
  - Fiduciary Tax
  - Nonresident Consolidated
  - Nonresident Inheritance Tax
  - Pass-through Entity
  - Personal Income Tax
  - Property Tax/Rent Rebate
  - Realty Transfer Tax

You will need the following information when making a payment for a billing notice:

| Information | Location/Description |
|---|---|
| **Letter ID** | Located on the upper right-hand corner of the notice |
| **Period Ending Date** | Located on the upper right-hand corner of the notice |
| **Payment Information** | Bank type, routing number, account number, or Credit/Debit information |
| **Valid Email Address** | Pop-up before final submission |

1. Select **Make a Payment** from the *Payments* panel on the myPATH homepage.
2. Select **Pay my Bill** on the *I Want To* page
3. Select an option from the **Tax Type** drop down
4. Complete the required fields on the **Account Information** page (SSN/FEIN/Account ID, filing period, Letter ID)
5. Complete the required fields on the **Payment Information** page (payor name & address)
6. Select how you would like to pay (**ACH or Credit/Debit**)
7. Enter the required information and select **Submit** to complete your payment.

### RETURN, ESTIMATED, & EXTENSION PAYMENTS

- **MAKE A PAYMENT** – submit a voucher, estimated, or extension payment for any of the following:
  - Fiduciary Tax
  - Nonresident Consolidated [cannot remit estimated payments]
  - Pass-through Entity [cannot remit return voucher payments]
  - Personal Income Tax

You will need the following information when making return voucher, estimated, and extension payments:

| Information | Location/Description |
|---|---|
| **Payment Information** | Bank type, routing number, account number, or Credit/Debit information |
| **Valid Email Address** | Pop-up before final submission |

1. Select **Make a Payment** from the *Payments* panel on the myPATH homepage
2. Select **Make a Payment** on the *I Want To* page
3. Select the **Account Type**
4. Select the **Payment Type**
5. Select the **Tax Year** for the payment to be applied
6. Enter the required information for the taxpayer or entity
7. Select **Next** to continue
8. Select how you would like to pay (**ACH** or **Credit/Debit**)
9. Enter the required information and select **Submit** to complete your payment

# Homepage Features - Payments

## WAGE GARNISHMENT PAYMENTS

- **MAKE A WAGE GARNISHMENT PAYMENT** – employers will need the following information when making a wage garnishment payment:

| Information | Location/Description |
|---|---|
| **Letter ID** | Located in the upper right-hand corner of the notice |
| **Garnishment ID** | Located in the Garnishment Information of the notice |
| **Employee Wages** | Required to determine payment amount |
| **Banking Information** | Bank type, routing number, account number |

1. Select **Make a Payment** from the *Payments* panel on the myPATH homepage
2. Select **Make a Wage Garnishment Payment** on the *I Want To* page
3. Enter the **FEIN**
4. Enter the **Garnishment ID**
5. Enter the **Letter ID**
6. Select **Next** to enter garnishment details
7. Indicate whether the employee listed on the garnishment notice is **still employed and collecting wages** (if **No**, input a checkmark next to the employee's name to remove the employee)
8. Enter the **gross wages** for the employee if that employee is still employed and collecting wages
9. Input a checkmark for the **employer fee** (optional)
10. Select **Next** to continue
11. Enter the required banking information and select **Submit** to complete your payment

## BANK ATTACHMENT PAYMENTS

- **MAKE A BANK ATTACHMENT PAYMENT** – banks will need the following information when making a bank attachment payment:

| Information | Location/Description |
|---|---|
| **Letter ID** | Located in the upper right-hand corner of the Order to Seize Funds notice |
| **Garnishment ID** | Located in the Garnishment Information of the notice |
| **Banking Information** | Bank type, routing number, account number |

1. Select **Make a Payment** from the *Payments* panel on the myPATH homepage
2. Select **Make a Bank Attachment Payment** on the *I Want To* page
3. Enter the **Garnishment ID**
4. Enter the **Letter ID**
5. Select **Next** to continue and complete your payment

## LIEN PAYMENTS

- **PAY OFF A LIEN** – you will need the following information when paying off a lien:

| Information | Location/Description |
|---|---|
| **Docket Number** | Located in the upper right-hand corner of the Certified Copy of Lien notice |
| **Letter ID** | Located in the upper right-hand corner of the Certified Copy of Lien notice |
| **Banking Information** | Bank type, routing number, account number |

1. Select **Make a Payment** from the *Payments* panel on the myPATH homepage
2. Select **Pay off a Lien** on the *I Want To* page
3. Enter the **Lien Docket Number**
4. Enter the **Letter ID**
5. Enter the required **Payment Information**
6. Select **Submit** to complete your payment

# Homepage Features - Payments

## TRACKING PAYMENTS & CREDITS

- **TRACK ESTIMATED/EXTENSION PAYMENTS & CARRY FORWARD CREDITS** – Verify the amount of payments and credits for the following account types:
  - Fiduciary Tax
  - Nonresident Consolidated
  - Pass-through Entity
  - Personal Income Tax

You will need **one** of the following:

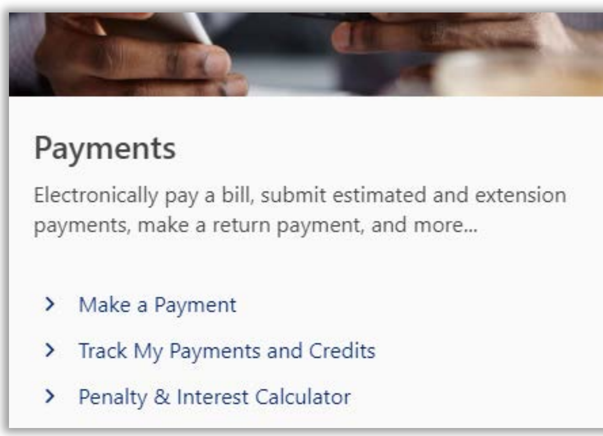
| Information | Location/Description |
|---|---|
| **Carry Forward Credit amount from prior year** | Amount listed as a carry over credit on the prior year tax return |
| **Amount of an Estimated Payment paid for the current tax year** | Bank/personal records |

1. Select **Track My Payments and Credits** from the *Payments* panel on the myPATH homepage
2. Select the **Tax Year** and **Account Type**
3. Enter the Social Security Number or Federal Employer ID Number
4. Indicate whether it is your first time filing a PA tax return
5. Select whether to search using a **submitted payment amount for the current tax year** <u>or</u> the amount of **carry forward credit requested from the prior tax year**
6. Select **Search**

## CALCULATE PENALTY & INTEREST

**PENALTY & INTEREST CALCULATOR** – Determine if you owe any penalty or interest for the following tax types:
- Consumer Fireworks Tax
- Corporation Tax
- Employer Tax
- Inheritance Tax
- Motor & Alternative Fuels Tax
- Personal Income Tax
- Public Transportation Assistance Fund Tax
- Realty Transfer Tax
- Sales & Use Tax
- Vehicle Rental Tax

1. Select **Penalty & Interest Calculator** from the *Payments* panel on the myPATH homepage
2. Select the **Account Type** from the drop-down menu
3. Complete the required fields and select **Calculate**

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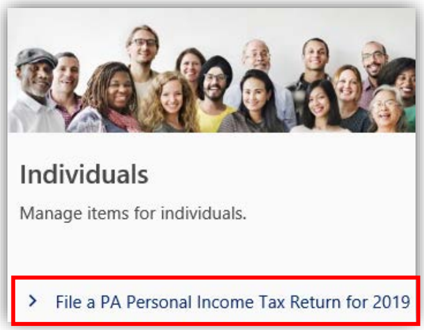
## FILING & TRACKING RETURNS & APPLICATIONS WITHOUT CREATING A PROFILE

### PERSONAL INCOME TAX RETURN

- **FILE A PA PERSONAL INCOME TAX RETURN** – File the PA-40, Personal Income Tax return directly from the myPATH homepage. You will need to provide either the **tax liability from the previous tax year** *or* **your birth date and PA Driver's License/Photo ID number and expiration date**. Some benefits of filing electronically include:
  - Instant confirmation of successful filing
  - Fast processing of refunds
  - Error-reducing automatic calculators
  - Line item guidance not available with paper filing



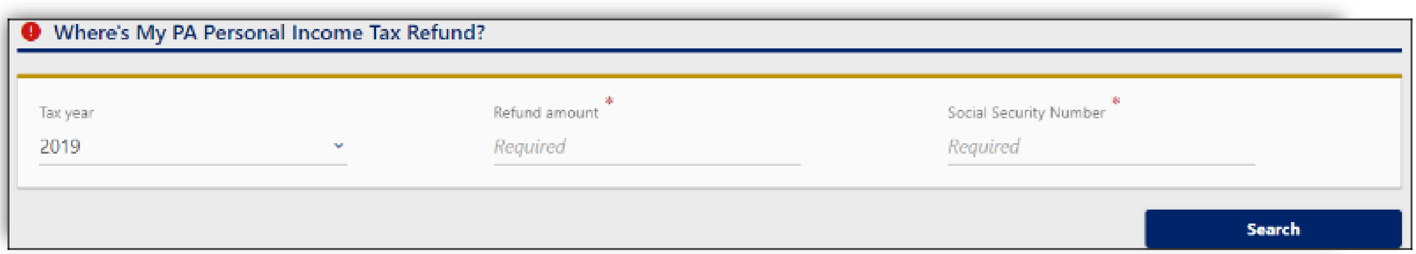

1. Select **File a Personal Income Tax Return for Year 20xx** from the *Individuals* panel on the myPATH homepage
2. Review the information in the "**Before we begin, you should know…**" section to determine if you have income, expenses, or credits that myPATH does not permit
3. Enter your **Social Security Number**
4. Enter your **last name**
5. Indicate whether you are **amending** your return
6. Indicate whether **you filed a Pennsylvania return for either of the previous two tax years**.
   a. If Yes, select a tax year and enter the tax liability amount from Line 12 of your PA-40 for that year
   b. If No, enter your date of birth, Pennsylvania Driver's License/Photo ID number and expiration date
7. Select **Next** to continue
8. Complete the required fields as necessary and select **Next** when prompted
9. Review and select **Submit** to file your return

**NOTE:** You can save your progress and file your return later by selecting the **Save Draft** option. Returns will be saved for 30 days. To complete your return, select **Find a Submission** from the myPATH homepage and enter your *Confirmation Code* and email address.

### TRACK A PERSONAL INCOME TAX REFUND

- **WHERE'S MY REFUND?** – Check the status of a refund for the current tax year or prior tax years without logging in.

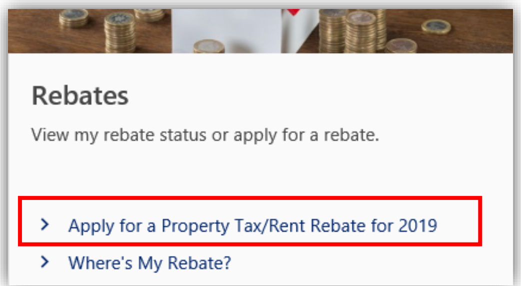
1. Select **Where's My Refund** from the *Refunds* panel on the myPATH homepage
2. Select the **Tax Year** from the drop-down menu
3. Enter the **Refund** amount
4. Enter the **Social Security Number**
5. Select **Search**

# Homepage Features – Returns & Applications

## APPLY FOR A PROPERTY TAX/RENT REBATE WITHOUT CREATING A PROFILE

- **APPLY FOR A PROPERTY TAX/RENT REBATE** – File a PA-1000, Property Tax/Rent Rebate Application directly from the myPATH homepage. **Be prepared to electronically upload supporting documentation with your application**. You will also need to provide an **email address**. Some benefits of filing electronically include:
  - Instant confirmation of successful filing
  - Fast processing of rebates with direct deposit
  - Error-reducing automatic calculators
  - User-friendly features not available with paper application

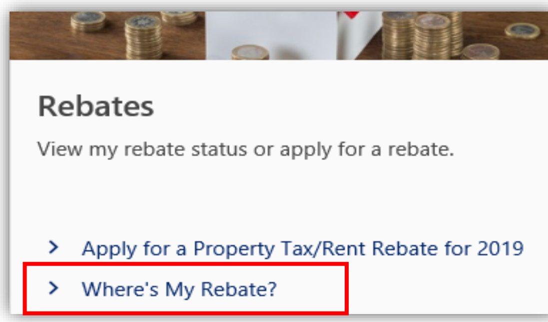


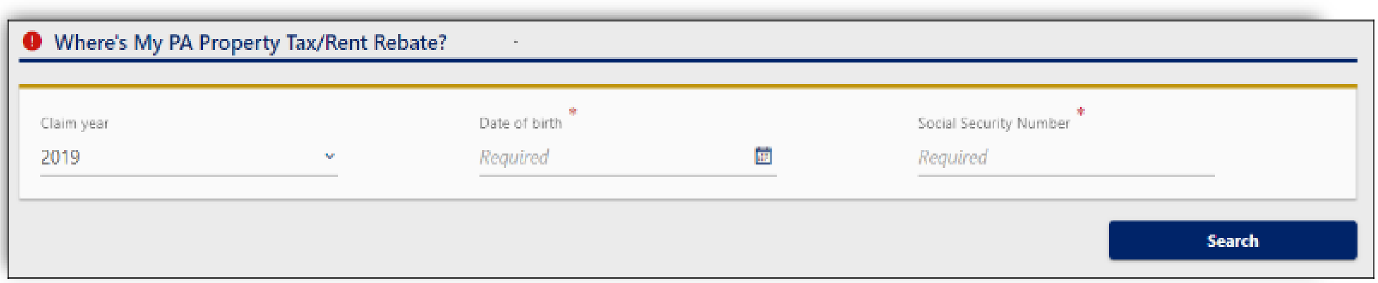

1. Select **Apply for a Property Tax/Rent Rebate for 20xx** from the *Rebates* panel on the myPATH homepage
2. Review the information in the "**Before we begin, you should know…**"
3. Select **Next** to continue
4. Enter the claimant's **date of birth**
5. Indicate whether the claimant is an **owner and/or renter**
6. Complete the required fields and select **Next** when prompted
7. Review the rebate information and select **Submit** once completed

**NOTE:** Applicants will not be able to submit an application if the system determines that they do not qualify for a rebate.

## TRACK A PROPERTY TAX/RENT REBATE

- **WHERE'S MY REBATE?** – Check the status of a rebate for the current claim year or prior claim years without logging in.
  1. Select **Where's My Rebate** from the *Rebates* panel on the myPATH homepage
  2. Select the **Claim Year** from the drop-down menu
  3. Enter the **date of birth**
  4. Enter the **Social Security Number**
  5. Select **Search**

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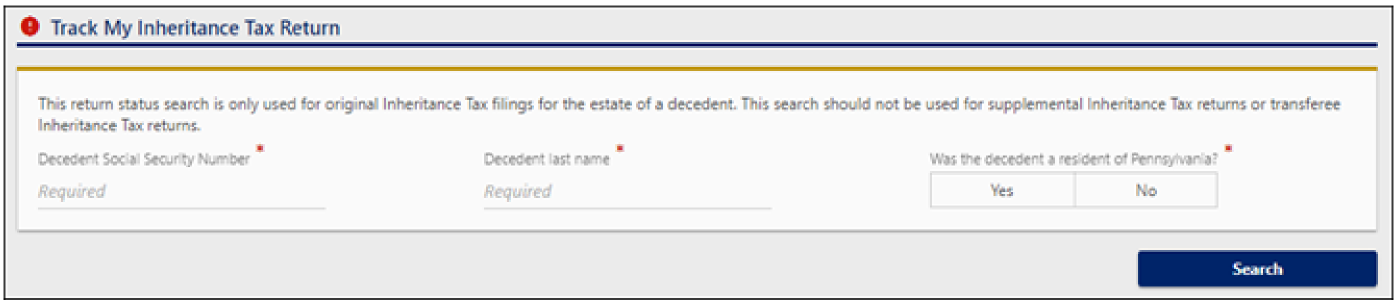
## TRACK AN INHERITANCE TAX RETURN

- **TRACK MY INHERITANCE TAX RETURN** – This return search is only for original Inheritance Tax filings for the estate of a decedent and should not be used for supplemental returns or transferee filings.

1. Select **Track My Inheritance Tax Return** from the *Inheritance* panel on the myPATH homepage
2. Enter the decedent's **Social Security Number**
3. Enter the decedent's **Last Name**
4. Indicate whether the decedent was a **resident of Pennsylvania**
5. Select **Search**

## CHANGES TO LETTERS/NOTICES

### LETTER ID

All letters and notices from the Department of Revenue have been rewritten upon the conversion to the new system to make notices easier to understand. One of the changes made is a Letter ID, which is similar to a DLN, located in the upper right-hand corner of the notice. A Letter ID is a unique identifier which is required to perform certain functions using myPATH.

**JOHN and ABIGAIL JONES**
1 MAIN ST
HARRISBURG, PA 55555

| | |
|---|---|
| Date Issued | 08/08/2019 |
| Letter ID | L000000000 |
| Social Security Number | ***-**-7876 |
| Account ID | 0000000000 |

### KEY AREAS

You will notice several key areas with this new format that are intended to make life easier for the customer. Please see the areas highlighted below:

**Why are you receiving this notice:** This section shows the customer exactly what the notice is about, explains any adjustments, and tells them how to contact the department.

**Personal Income Tax Billing Notice**

This is a billing notice of tax, penalties, interest, or fees for your Personal Income Tax account for the period referenced above. Tax periods shown below include periods that do not have a zero balance.

**Why you are receiving this notice**
If you have any questions regarding this notice, please contact the department using the information provided.

Customer Experience Center
1-888-222-9190

An adjustment was made to the return filed on the account and period referenced. A summary of these changes is included with this notice.

This has resulted in additional tax, interest, and/or penalty due on this account.

Interest will accrue in accordance with the Department's calculation method (Rev-1611) until the tax has been paid.

**Year Ending: Filing Period** December 31, 2019

| | Balance Owed |
|---|---|
| Tax | $154.00 |
| Interest | $3.95 |
| Penalties | $38.50 |
| Payments and Credits | $0.00 |
| **Total Balance Owed:** | **$196.45** |

**What you need to do:** This section tells the customer exactly what to do. If they disagree, this will show them how to appeal and if they need to send information to us, it will have the instructions for submitting through myPATH, as well as the mailing address or fax number listed.

| | |
|---|---|
| **Penalties** | |
| | Late Filing Penalty |
| | Late filing of this return has resulted in 5% penalty per month up to 25% of the total tax due. |
| | $38.50 |
| | **Forecasted Penalty:** $38.50 |
| **What you need to do** | If you disagree with this billing notice, send a detailed explanation within 30 days. If you do not reply within 30 days from the date of this notice or pay the amount due, you will be issued an assessment. An appeal may not be filed with the Board of Appeals until the assessment notice has been issued.<br><br>Please submit all correspondence online through the Submissions panel on myPATH. If you are unable to submit your correspondence online, you may fax or mail it using the information provided.<br><br>Pennsylvania Department of Revenue<br>PO Box 280431<br>Harrisburg, PA 17128-0431<br><br>Fax: (717) 705-6236 |
| **General Information** | Credits and payments may be applied according to the applicable statutes and regulations. Generally, payments are applied to current period tax, interest, penalties, and legal fees, in that order. Remaining overpayments and credits are offset against other liabilities before transfer or refund of credit is made. Unpaid balances will reduce or eliminate any future refund.<br><br>The Bankruptcy Code, 11 U.S.C. §362(b)(9)(D), permits issuance of a tax determination and payment demand. Liabilities incurred prior to filing a bankruptcy petition do not have to be paid, but all taxes for periods subsequent to the bankruptcy date should be paid. If you are in an active bankruptcy proceeding, this document is for information purposes only. |
| **How to pay** | Payments may be submitted online via *mypath.pa.gov* or by mailing the included voucher.<br><br>Credit card payments can be made through *officialpayments.com* |

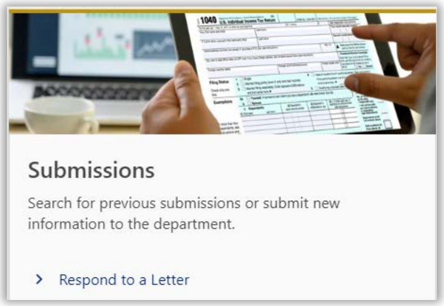
The other areas of the notice may vary depending upon the type of notice received. If there was an adjustment made to the account, the notice will have a breakdown of the reported and adjustment amounts by line item. Please see the attachments at the end of the guide for copies of notices.

# Homepage Features – Letters & Forms

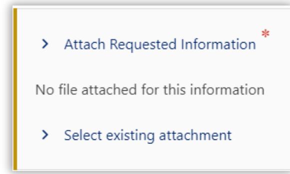
## RESPOND TO A LETTER

Customers and their representatives can submit documents directly to the department in response to a request for information. This is a non-logged in function on the myPATH homepage.

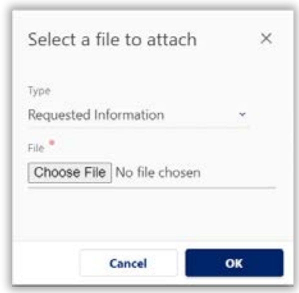
1. Select **Respond to a Letter** from the *Submissions* panel on the myPATH homepage




2. Enter the **Letter ID** and select the **ID Type** (FEIN or SSN)
3. Enter the **ID** and select **Search**
4. Select **Submit Documentation** to upload correspondence
5. Select **Attach Requested Information** to attach a file




6. Select **Choose File**, locate the document to be uploaded, select **OK** (repeat Steps 5 and 6 for each request). Select **Submit** to complete




## ID & REFUND VERIFICATION LETTERS

### ID VERIFICATION QUIZ LETTER

- **TAKE ID VERIFICATION QUIZ** – You will need the following information before you begin the quiz:

| Information | Location/Description |
|---|---|
| **Letter ID** | Located in the upper right-hand corner of your Identity Verification Letter |
| **Overpayment Amount from PA-40** | Amount from Line 29 of your PA-40 for the tax year in question on your Identity Verification Letter |

1. Select **Take ID Verification Quiz** from the *Individuals* panel on the myPATH homepage
2. Enter the **Letter ID**
3. Enter the confirm the **last 4 digits** of the **Primary Filer's SSN/ITIN**
4. Indicate whether **you (or your representative) filed the return** for the tax year on the letter or if **you did not file the return** in question
   a. If **Yes**, enter the **Overpayment Amount**. Select **Submit** to continue and complete the quiz\
   b. If **No**, provide your contact information – you will not be required to take the ID Verification Quiz. Select **Submit**

### REFUND VERIFICATION CODE LETTER

- **ENTER VERIFICAITON CODE** – You will need the following information to verify your identity:

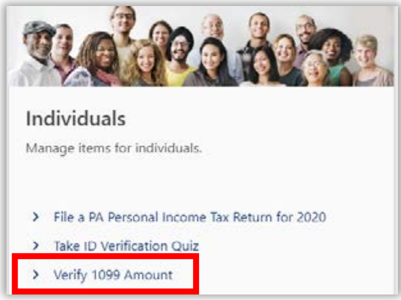
| Information | Location/Description |
|---|---|
| **Verification Code** | Located in the What you need to do section of your Identity Verification Notice |
| **Overpayment Amount from PA-40** | Amount from Line 29 of your PA-40 for the tax year in question on your Identity Verification Notice |

1. Select **Enter Verification Code** from the *Refunds* panel on the myPATH homepage
2. Enter your **Last Name**
3. Enter and confirm your **Verification Code**
4. Indicate whether **you (or your representative) filed the return** for the tax year on the letter or if **you did not file the return** in question
   a. If **Yes**, enter the **Overpayment Amount** and select **Submit**
   b. If **No**, provide your contact information - you will not be required to enter an Overpayment Amount). Select **Submit**

## FORMS

### FORMS 1099-G OVERPAYMENT & 1099-INT INTEREST

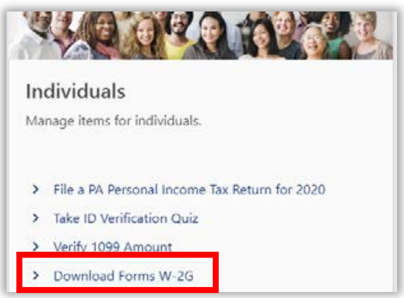
- **REQUEST 1099 AMOUNT** – Retrieve your 1099-G overpayment amount or 1099-INT interest amount for prior tax years.




1. Select **Verify 1099 Amount** from the *Individuals* panel on the myPATH homepage
2. Enter the **Last Name**
3. Enter the **Zip Code**
4. Enter the **Social Security Number**
5. Select the **Tax Year** from the drop-down menu
6. Select the **1099 Type** from the drop-down menu
7. Select **Search**

### FORMS W-2G PENNSYLVANIA GAMBLING WINNINGS

- **DOWNLOAD W-2G DOCUMENTS** – If you had gambling winnings in Pennsylvania, you may request and download copies of your Forms W-2G directly from the myPATH homepage.




1. Select **Download Forms W-2G** from the *Individuals* panel on the myPATH homepage
2. Select the **Tax Year** from the drop-down menu
3. Enter the **Social Security Number**
4. Indiciate whether you are a **Business** <u>or</u> an **Individual**
5. Enter the **Business Name** <u>or</u> **your First** and **Last Name**
6. Select **Search**

# Homepage Features – Registration & Submissions

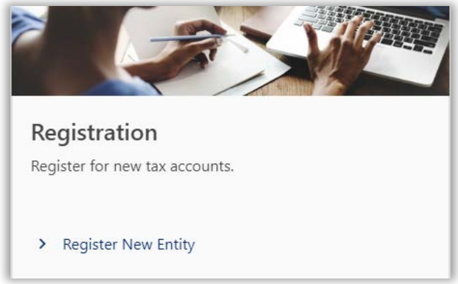
## REGISTER NEW MOTOR & ALTERNATIVE FUELS TAX ACCOUNTS

- **REGISTER NEW ENTITY** – Register for any of the following taxes:
  - o Motor Fuel Tax
  - o Alternative Fuels Tax
  - o International Fuel Tax Agreement (IFTA)
  - o Motor Carrier Road Tax
  - o Pennsylvania Fuel Transporter

You will need the following information before you begin:

- o IDs
- o Addresses
- o Start dates
- o Contact information

1. Select **Register New Entity** from the *Registration* panel on the myPATH homepage

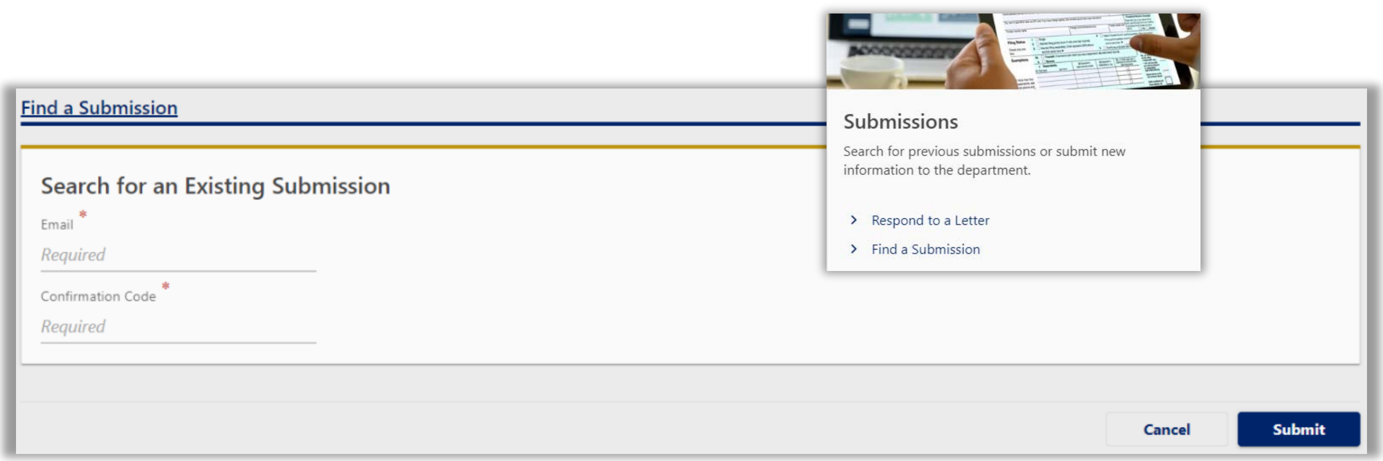



2. Select the **Entity Type** from the drop-down menu (**Business** or **Individual**)
3. Complete the required information
4. Continue to select **Next** when prompted until the application is complete

## FIND A SUBMISSION

- **FIND A SUBMISSION** – You will need the **Email Address** and **Confirmation Code** to search for transactions such as, payments, applications, or returns that were submitted via myPATH.

1. Select **Find a Submission** from the *Submissions* panel on the myPATH homepage
2. Enter the **Email** address used for the transaction
3. Enter the **Confirmation Code** from the transaction
4. Select **Submit**



# mYPATH PROFILES

Many of the non-logged in options on the myPATH homepage are also available to those that log in to their myPATH profile. However, logged in users have additional options to easily manage their returns and payments, remit payments, view letters received from the department, send messages directly to the department, grant other myPATH users access to their tax accounts, request access to other users' tax accounts, and more. This section covers the process of creating a myPATH profile and explores the features available only to logged in users.

## PROFILE TYPES

There are three different profile types within myPATH. The chart below identifies each profile type and its primary function:

| Profile Type | Description |
|---|---|
| Master Administrator ***(Primary User)*** | This is the highest type of access and should be the primary user or account holder, such as the taxpayer or claimant themself. Each customer may only have one Master Administrator but may create any number of secondary user profiles and manage the security access of secondary users and third party users associated with their profile. |
| Account Administrator ***(Secondary User)*** | All logons created by the Master Administrator are considered Account Administrators. These secondary users are generally those who perform work on behalf of the account holder. There can be several Account Administrators per customer. These users cannot manage the security access of Master Administrators but may manage the security access of third party users. |
| Account Manager ***(Third Party User)*** | This is the lowest level of access and is granted by default to those who register as a third party. Tax professionals (accountants, practitioners, or representatives) should select this profile type if using myPATH to manage tax information on behalf of their clients. Account Managers cannot manage the security access of Master Administrators or Account Administrators. |

## REQUIREMENTS

When signing up for a myPATH profile, please consider the following requirements:

- A **unique email address** that is not associated with any other myPATH profile
- **Usernames** must be a minimum of **5 characters** (no special characters)
- **Passwords** must be a minimum of **8 characters** and must contain at least one of the following: **uppercase and lowercase letters, numbers, and special characters**
- **Primary phone number**

**IMPORTANT:** View the section on how to set up two-step verification and request an Access Letter

**MASTER ADMINISTRATORS ONLY:**

You will be asked to provide either your **Social Security Number** and **Last Name** OR the **Federal Employer ID Number** and the **Business Name**. The ID and the name provided must match department records.

**NOTE:** You will not be able to sign up for a Master Administrator profile if you are a nonresident of Pennsylvania, do not have a Driver's License or Photo ID issued by Pennsylvania, or have never filed a return / registered a tax account with the Pennsylvania Department of Revenue.

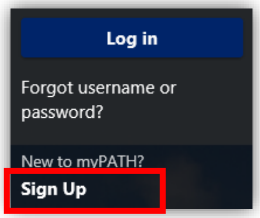
myPATH.pa.gov

# myPATH PROFILES

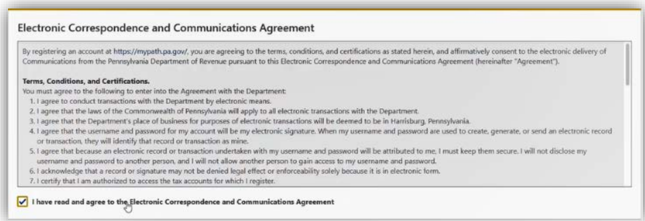
## HOW TO SIGN UP

### MASTER ADMINISTRATOR (PRIMARY USER)

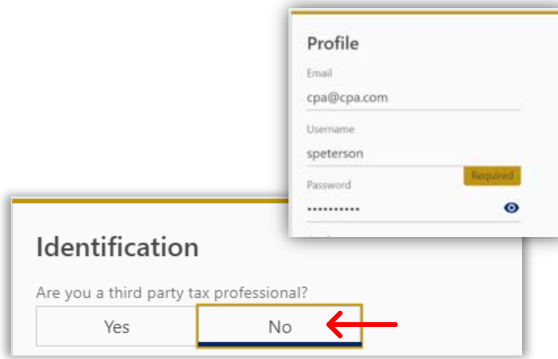
1. Navigate to the myPATH homepage
2. Select **Sign Up** from the *Log In* panel




3. Review and check the box to confirm that you have read and agree to the **Electronic Correspondence and Communications Agreement**




4. Complete the required fields in the *Profile* and *Identification* boxes and select **Submit**



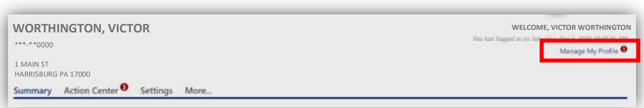

**NOTE:** To sign up as a Master Administrator, select **No** in the *Identification* panel to indicate you are not a third party tax professional. If you are a tax professional and would like to use myPATH to manage your own tax accounts and the tax accounts of your clients, you will need to **register for two separate profiles** – a Master Administrator profile and a Third Party User profile.

**IMPORTANT:** View the section on how to set up **Two-Step Verification** and requesting an **Access Letter** to complete your registration.

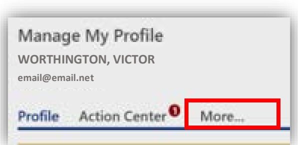
### ACCOUNT ADMINISTRATOR (SECONDARY USER)

Account Administrator profiles are created by Master Administrators. To create an Account Administrator profile:

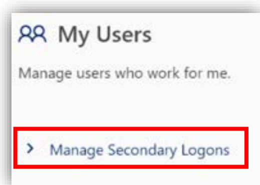
1. The **Master Administrator** must log in with their username and password
2. Select **Manage My Profile**



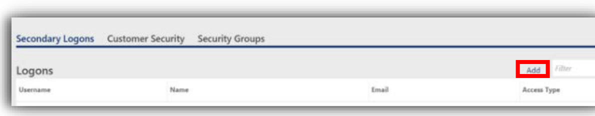

3. Select **More…**



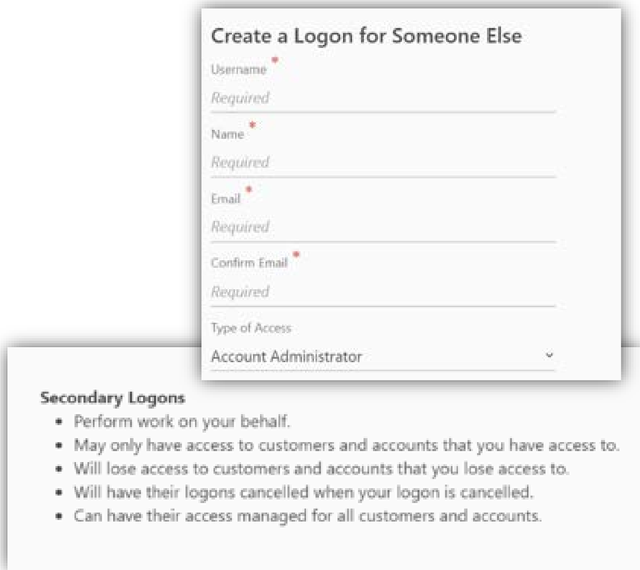

4. Select **Manage Secondary Logons** from the *My Users* panel




5. Select **Add** and enter the required information

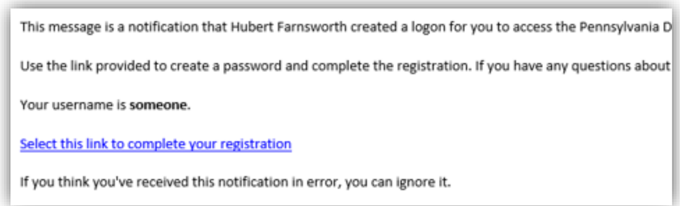


6. Select **Account Administrator** from the *Type of Access* drop-down menu




The **Account Administrator** will receive an email containing the **username** that was created by the Master Administrator and a link to complete the registration:

1. Open the email and **select the link to complete your registration**.


This message is a notification that Hubert Farnsworth created a logon for you to access the Pennsylvania D

Use the link provided to create a password and complete the registration. If you have any questions about

Your username is **someone.**

Select this link to complete your registration

If you think you've received this notification in error, you can ignore it.

2. Create and confirm a **New Password** when prompted
3. Select **Submit**

**IMPORTANT:** View the section on how to set up **Two-Step Verification** and requesting an **Access Letter** to complete your registration.

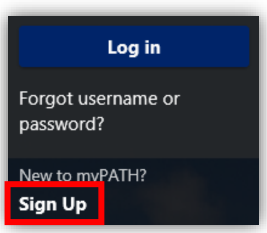
## ACCOUNT MANAGER (THIRD PARTY USER)

**Tax professionals** are encouraged to sign up for a **third party user profile** to manage their clients' tax accounts. Access to tax information must be granted to the third party user. The chart below lists the actions available to those designated as Account Managers and have access to another user's tax account:

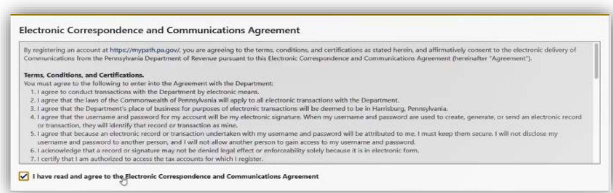
| Access Level | Description |
|---|---|
| **File Returns and Make Payments** | Allows the ability to view accounts, file returns, and make payments. |
| **File Returns** | Allows the ability to view accounts and file returns. |
| **Make Payments** | Allows the ability to view accounts and make payments. |
| **View** | Allows the ability to view accounts. |

To sign up for an **Account Manager** profile:

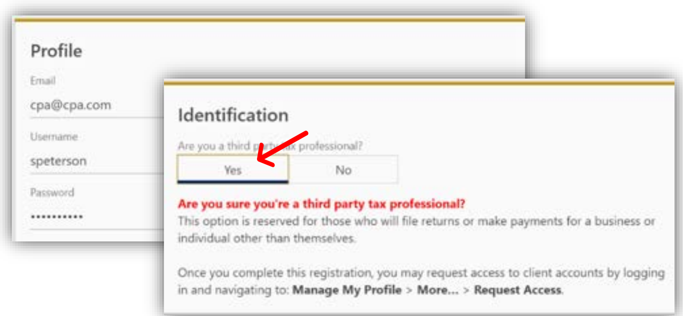
1. Select **Sign Up** from the *Log In* panel on the myPATH homepage




2. Review and check the box to confirm that you have read and agree to the **Electronic Correspondence and Communications Agreement**




3. Enter the required information in the *Profile* panel and select **Yes** to identify as a third party tax professional




**IMPORTANT:** View the section on how to set up **Two-Step Verification** and requesting an **Access Letter** to complete your registration.

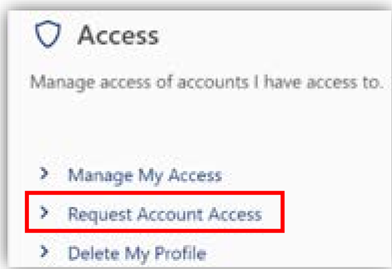
## REQUEST ACCESS TO YOUR CLIENT'S ACCOUNT

Your client is required to create a myPATH profile before you can request access to their tax information. Once your client has signed up for myPATH, follow these instructions to request access:

1. **Log in** to your third party user profile
2. Select **Manage My Profile**


3. Select **More…**

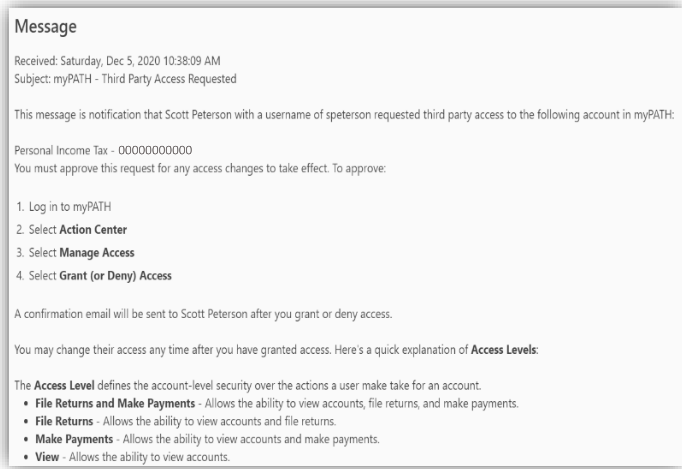

4. Select **Request Account Access** from the *Access* panel




5. Select the **Account Type** from the drop-down menu (each account type must be selected separately if the client has more than one type of tax account that you will manage on their behalf)

6. Enter the **Account ID** for your client's tax account (the Account ID is the number designated to the tax account and is available to the client when logged in to their profile and is located on letters received from the department)

7. The next time **your client** logs in to their profile, they will **receive a notification** that you have requested access to their tax account(s)




**NOTE:** The third party user must wait for their client to either Grant or Deny Access. Once access has been granted or denied, the third party user will receive a notification which can be viewed by accessing messages through the *Action Center*

# myPATH PROFILES

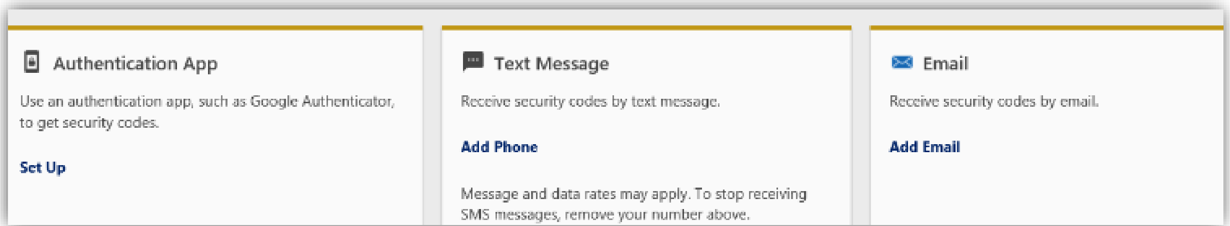
## TWO-STEP VERIFICATION & REQUESTING AN ACCESS LETTER

### TWO-STEP VERIFICATION

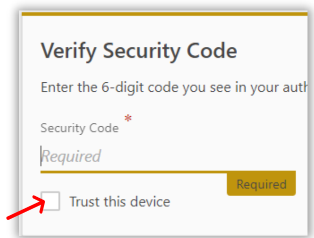
After registering for a profile, you must log in with your newly created username and password to set up two-step verification and submit a request to receive an Access Letter in the mail.

Two-step verification identifies users using two different components: something the user knows and something the user possesses. In this case, the user knows the myPATH username and password and possesses access to a designated device or email address. A unique security code is required to protect each myPATH profile. The security can be received via SMS (text message), email, or authentication app.

1. Log in with the **username** and **password**
2. Set up T**wo-Step Verification** by selecting how you would like to receive your Security Code: **authentication app, text message, or email**




3. Retrieve and enter the **Security Code** into the required field and select **Confirm**

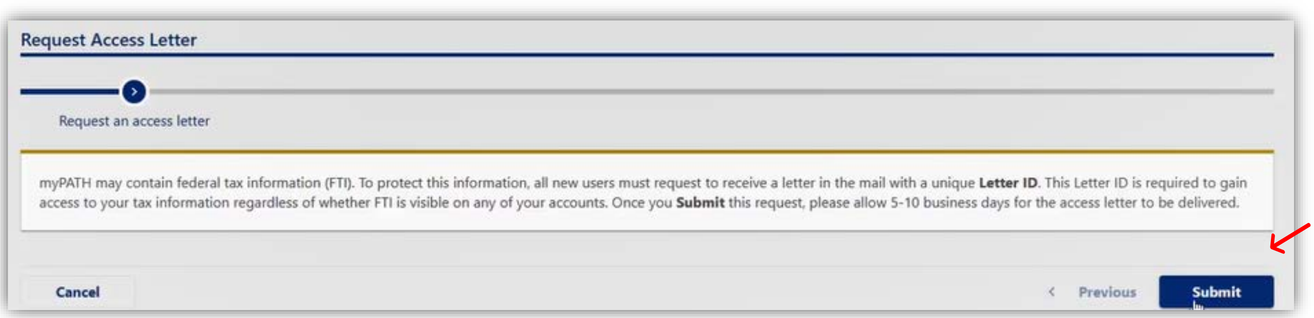



**NOTE:** By selecting **Trust this device**, you will not be required to complete the two-step verification each time you log in as long as you are using the same browser and the same device.

### REQUESTING AN ACCESS LETTER

myPATH may contain federal tax information (FTI). To safeguard this sensitive information, all new myPATH users must log in to request an Access Letter after creating a username and password. The Access Letter will contain a unique Letter ID which is required to gain access to tax information in myPATH regardless of whether FTI is visible on the account. This letter **must be mailed** to ensure confidentiality is maintained. **Agents are not permitted to provide the Letter ID over the phone or via email.** Once the letter is received, the customer may then complete the registration of their myPATH profile.

1. After setting up Two-Step Verification, you will be prompted to **Request an Access Letter**. Read the disclaimer and select **Submit**.



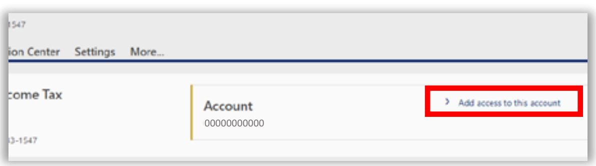
- Allow 5-10 days from the date of the initial request for a myPATH Access Letter to be received in the mail
- **Master Administrator logons** will have their Access Letter mailed to the **address currently on file** with the department
- **Secondary and third party user logons** are required to enter their **name** and **mailing address** in order to receive the Access Letter.

2. Once the letter is received, log in to enter the **Letter ID** and complete the registration process.

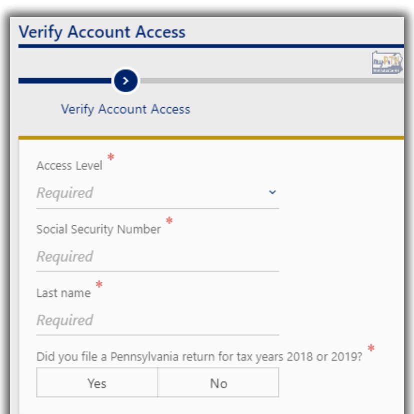

## ADD ACCESS TO TAX ACCOUNT

If you signed up for a **Master Administrator** profile, you must **add access to each tax account** associated to you in your myPATH profile to access the logged in options available including: view balances, make payments, view letters, request a payment plan, request a statement of account, and much more.

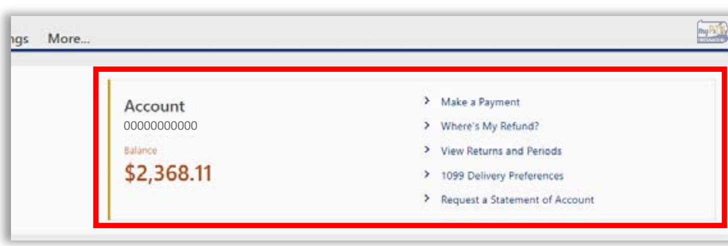
1. After entering the Letter ID from your Access Letter and completing your profile information, select **Add access to this account** located next to each tax account listed on the *Summary* page.




2. Select the **Access Level** from the drop-down menu: **Make Payments** (full access) *or* **View** (view only). You may change the Access Level at a later time. Continue to complete the required information by entering your **Social Security Number** and **Last Name**




3. Select **Yes** or **No** as your answer to the question regarding previous year tax return filing.
   a. If **Yes**, select a tax year and enter the **PA-40 Line 12 amount**.
   b. If **No**, enter your **date of birth** and **Pennsylvania Driver's license/Photo ID number**.
4. Select **Submit**. You have completed the access process and should have more options next to your tax account(s). Repeat for each tax account you would like to access.

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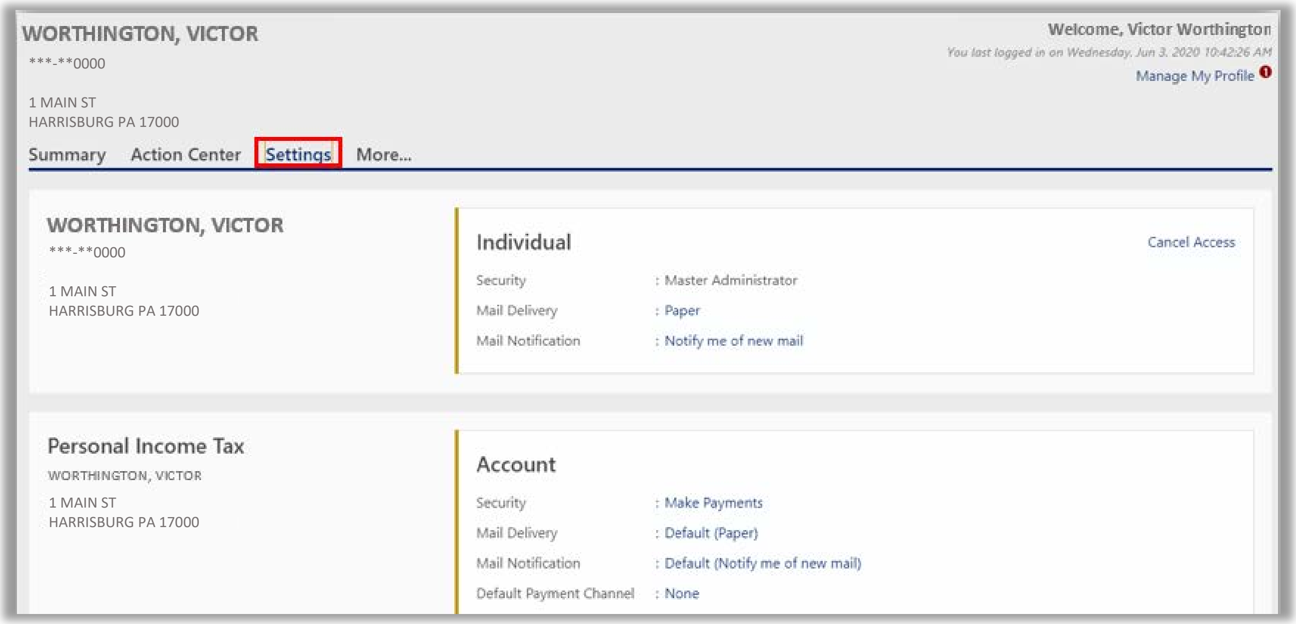
# mYPATH PROFILES

## MANAGING PREFERENCES & SETTINGS

### MAIL DELIVERY, MAIL NOTIFICATION, & DEFAULT PAYMENT CHANNEL PREFENCES

myPATH users can adjust their Mail Delivery, Mail Notification, and Default Payment Channel preferences by selecting **Settings**. Select the link next to the option you would like to update.

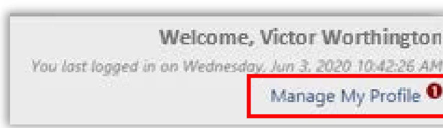
| Preference Type | Description |
| --- | --- |
| **Mail Delivery** | ***Paper* is the default** for both the individual user and each tax account. Update to **email** to receive letters from the department electronically. |
| **Mail Notification** | ***Notify me of new mail* is the default** for both the individual user and each tax account. |
| **Default Payment Channel** | ***None* is the default** option (tax accounts only). Update to **add banking information** for future use. |

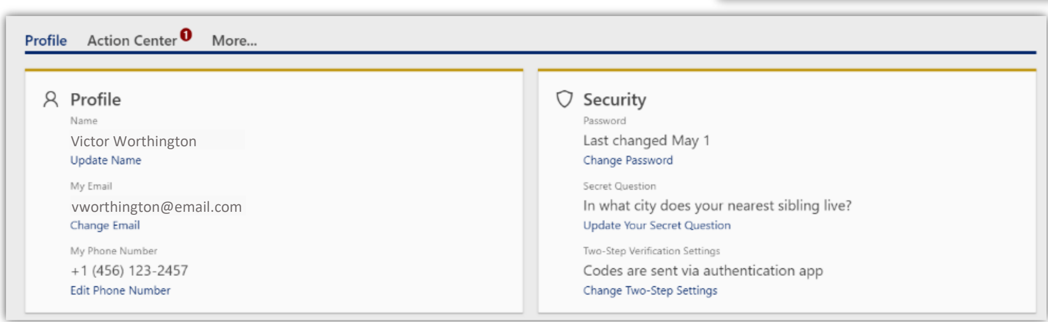



## PROFILE AND SECURITY SETTINGS

You can update your name, email address, phone number, change your password, update your secret question and answer, and change two-step verification settings:

1. Log in with your **username** and **password**
2. Select **Manage My Profile**
3. Select an option from the *Profile* or *Security* panels to change



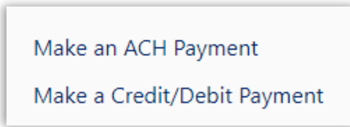
# Logged In Features

## PAYMENTS

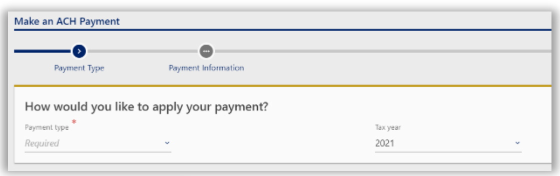
### ACCOUNT, RETURN, & EST./EXT. PAYMENTS

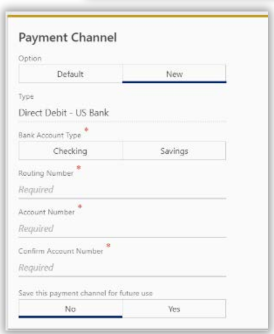
1. Log in with the **username** and **password**
2. Select **Make a Payment** next to the tax account on the *Summary* page for which you would like to pay

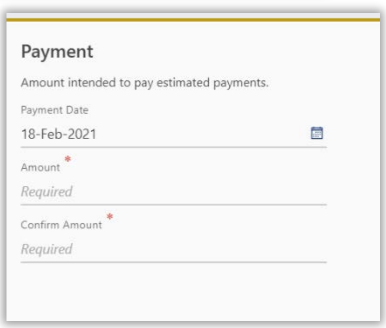

3. Select **ACH Payment** or **Credit/Debit Payment***



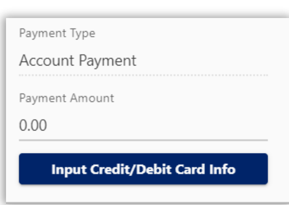

- For **ACH Payments**, select the **Payment Type** and **Tax Year** from the respective drop-own menus and select **Next** to enter the required payment information. Select **Submit** to remit the payment.



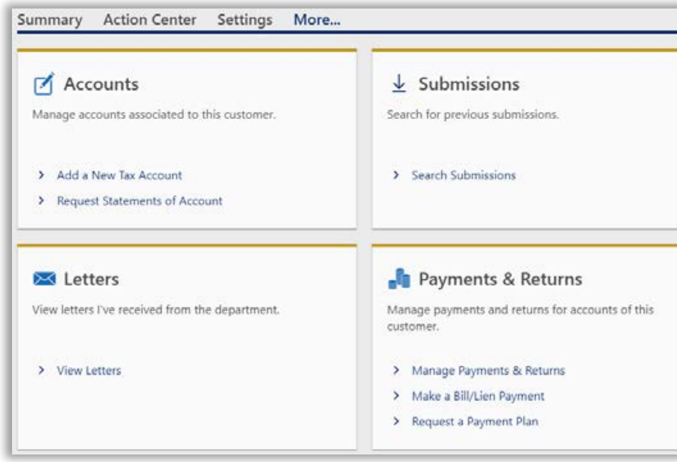

- For **Credit/Debit Payments**, enter the **Payment Amount** and select **Input Credit/Debit Card Info** to complete the transaction via *ACI Payments, Inc*.



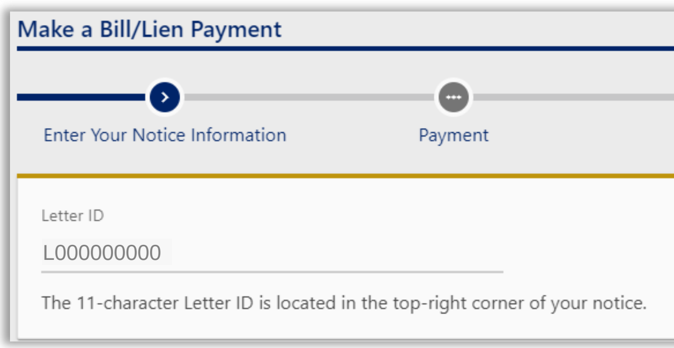

*Account payments only. Fees apply.

### MAKE A BILL/LIEN PAYMENT

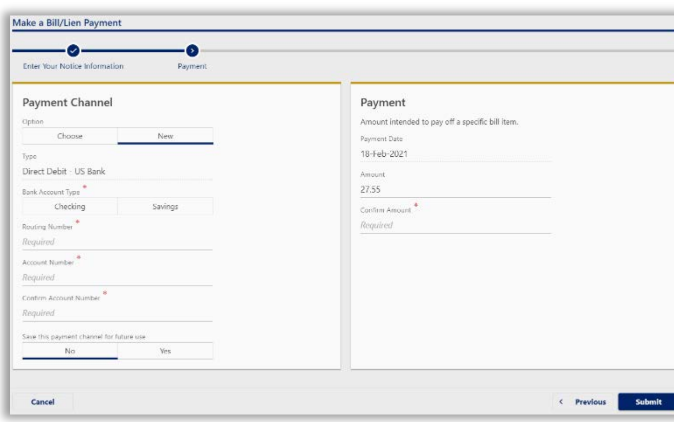
1. Select **More…**, then select **Make a Bill/Lien Payment** from the *Payments & Returns* panel




2. Enter the **Letter ID** from your letter and select **Next**



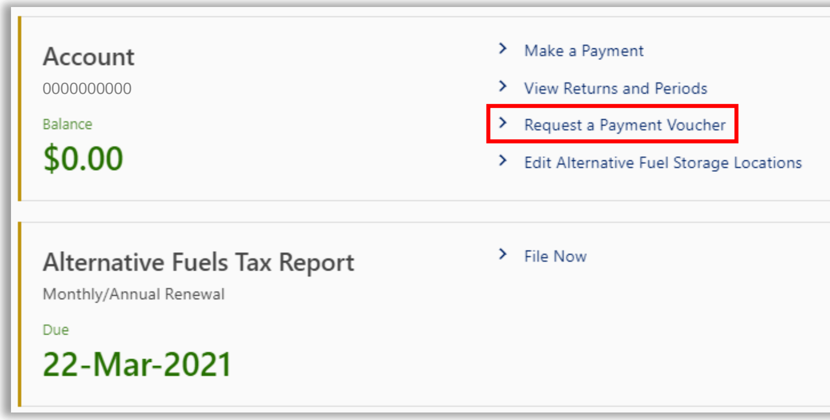

3. Select the **Bank Account Type** and enter the required banking information
4. Enter and confirm the **Payment Amount**
5. Select **Submit** to remit the payment



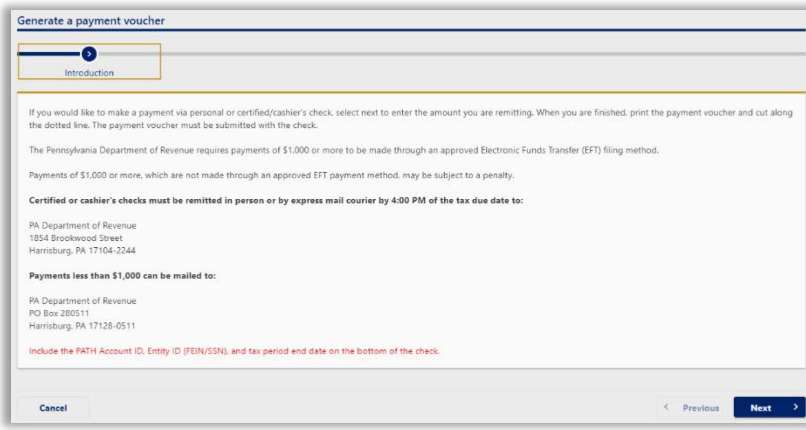
## REQUEST A PAYMENT VOUCHER

Generate and print a payment voucher to accompany a personal or certified/cashier's check for amounts less than $1,000. Payments of $1,000 or more, which are not made through an approved EFT payment method, may be subject to penalty.

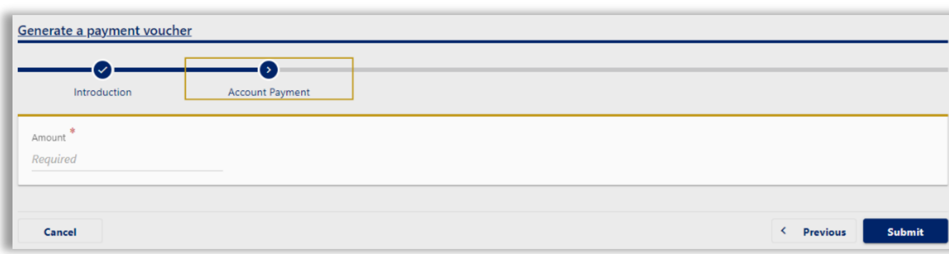
1. Log in with the **username** and **password**
2. Select **Request a Payment Voucher*** next to the tax account on the *Summary* page




3. Read the information regarding personal or certified/cashier's check payments and mailing addresses, then select **Next**




4. Enter the amount and select **Submit**



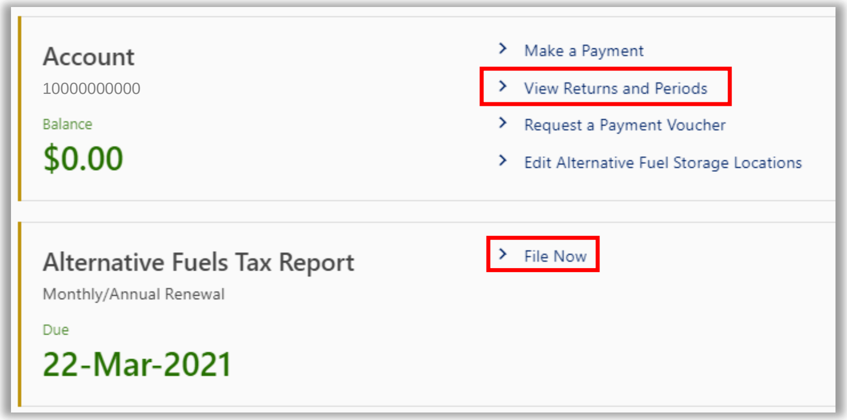

5. Print the payment voucher and cut along the dotted line. The payment voucher much be submitted with the check.

*Option only available for certain account types

## VIEW PERIODS & FILE/AMEND RETURNS

View return and period information for a specific account. Certain types of accounts may also file/amend returns if applicable.

1. Log in with the **username** and **password**
2. Select **View Returns and Periods** (account details) *or* select **File Now** (file a return/report) next to the tax account on the *Summary* page.

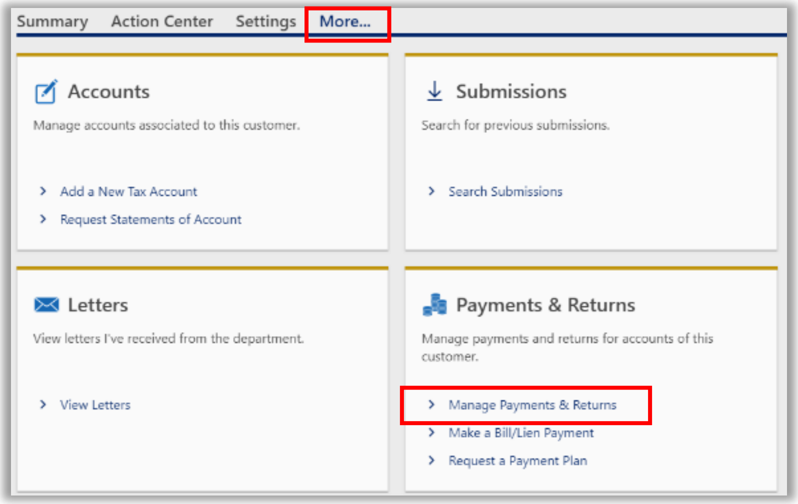



3. Detailed information can be viewed on the **Returns** and **Periods** tabs. Select a **Period** to view a summary of the activity for that period *or* select the corresponding link to file an *Expected* return/renewal/permit.

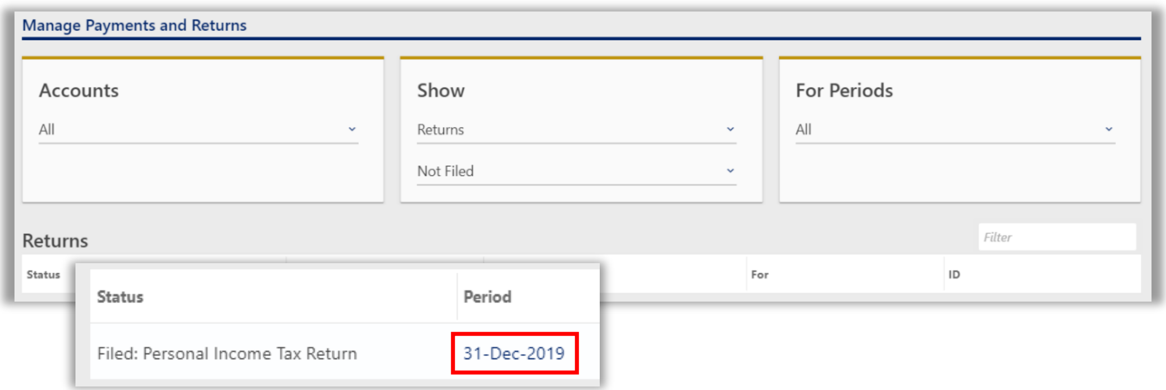
## MANAGING PAYMENTS & RETURNS

Quickly search for payments, returns, balances, or available credits. You can also view returns that are filed or outstanding:

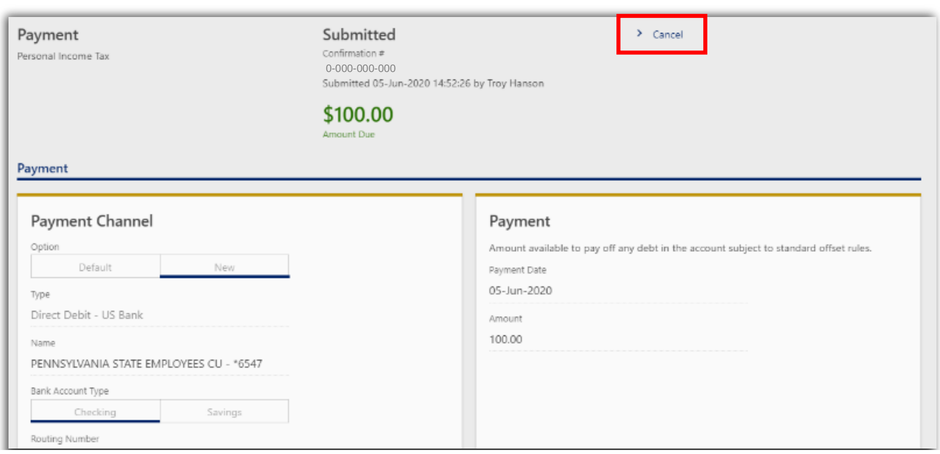
1. Select **More…**, then select **Manage Payments & Returns** from the *Payments & Returns* panel




2. Use the drop-down menu options to view payments or returns for specific accounts and/or periods. Select the **Period** link to view details of the activity for that period




3. Payments and returns that are in a **Pending** status may be canceled by selecting the specific payment or return and selecting **Cancel** at the top of the submission

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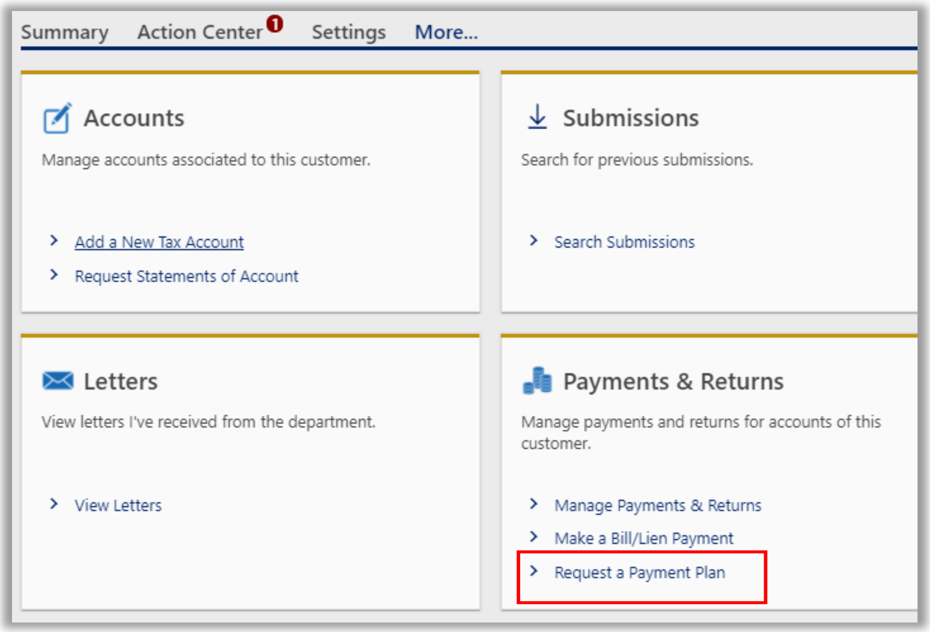
## REQUEST A PAYMENT PLAN

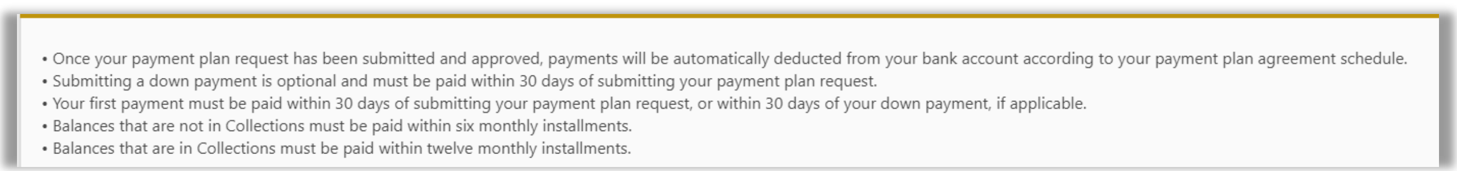
Request a payment plan for qualifying balances that are in a Billing or Collections status. Payment plans are not available if:

- You do not have any qualifying balances (not in a Billing or Collections status)
- You already have an active payment plan
- You are currently in a Garnishment or Bank Attachment process with the department
- You are currently in a Bankruptcy process

1. Select **More…**, then select **Request a Payment Plan** from the *Payments & Returns* panel

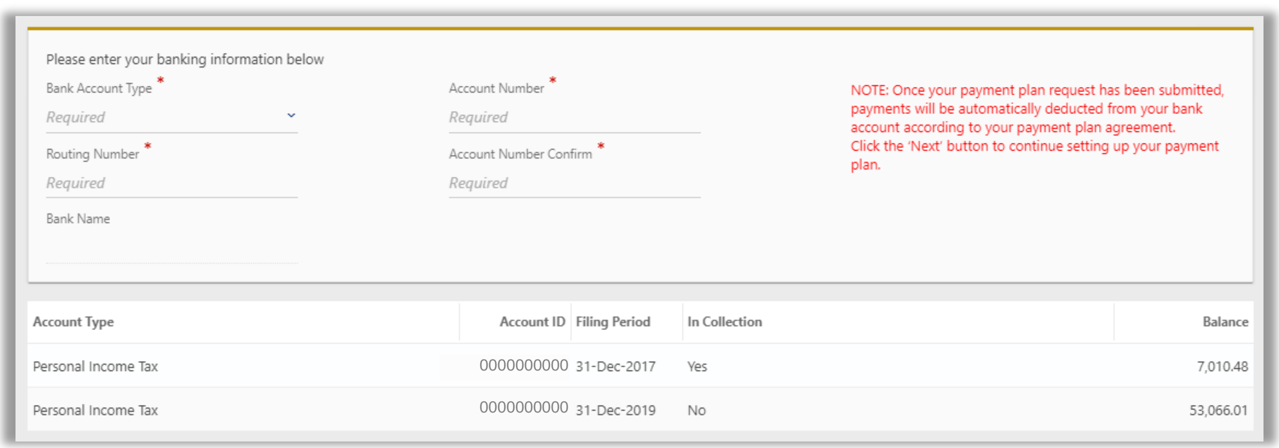



2. Review the **Payment Plan Terms** and select **Next** to set up your payment plan



- Once your payment plan request has been submitted and approved, payments will be automatically deducted from your bank account according to your payment plan agreement schedule.
- Submitting a down payment is optional and must be paid within 30 days of submitting your payment plan request.
- Your first payment must be paid within 30 days of submitting your payment plan request, or within 30 days of your down payment, if applicable.
- Balances that are not in Collections must be paid within six monthly installments.
- Balances that are in Collections must be paid within twelve monthly installments.

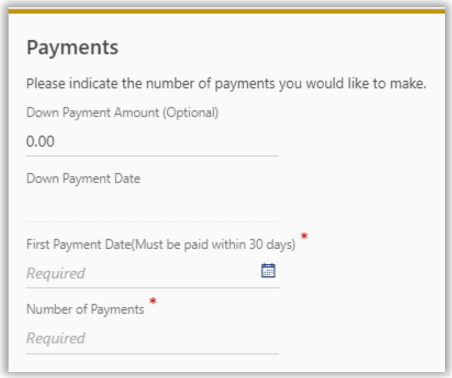
3. Enter your banking information, review the qualifying balance(s), and select Next to continue




| Account Type | Account ID | Filing Period | In Collection | Balance |
|---|---|---|---|---|
| Personal Income Tax | 0000000000 | 31-Dec-2017 | Yes | 7,010.48 |
| Personal Income Tax | 0000000000 | 31-Dec-2019 | No | 53,066.01 |

4. Enter a **Down Payment Amount and Date** (optional). If selecting to remit a down payment, the down payment date should be **within 30 days of submitted your request** for a payment plan.

5. Enter the **First Payment Date** and the **Number of Payments**. The first payment date should be within 30 days of submitting your request, or within 30 days of the down payment if applicable. Select **Next** to continue.
    a. Balances in a Billing status must be paid within 6 monthly installments
    b. Balances in a Collections status must be paid within 12 monthly installments



Payments

Please indicate the number of payments you would like to make.

Down Payment Amount (Optional)

0.00

Down Payment Date

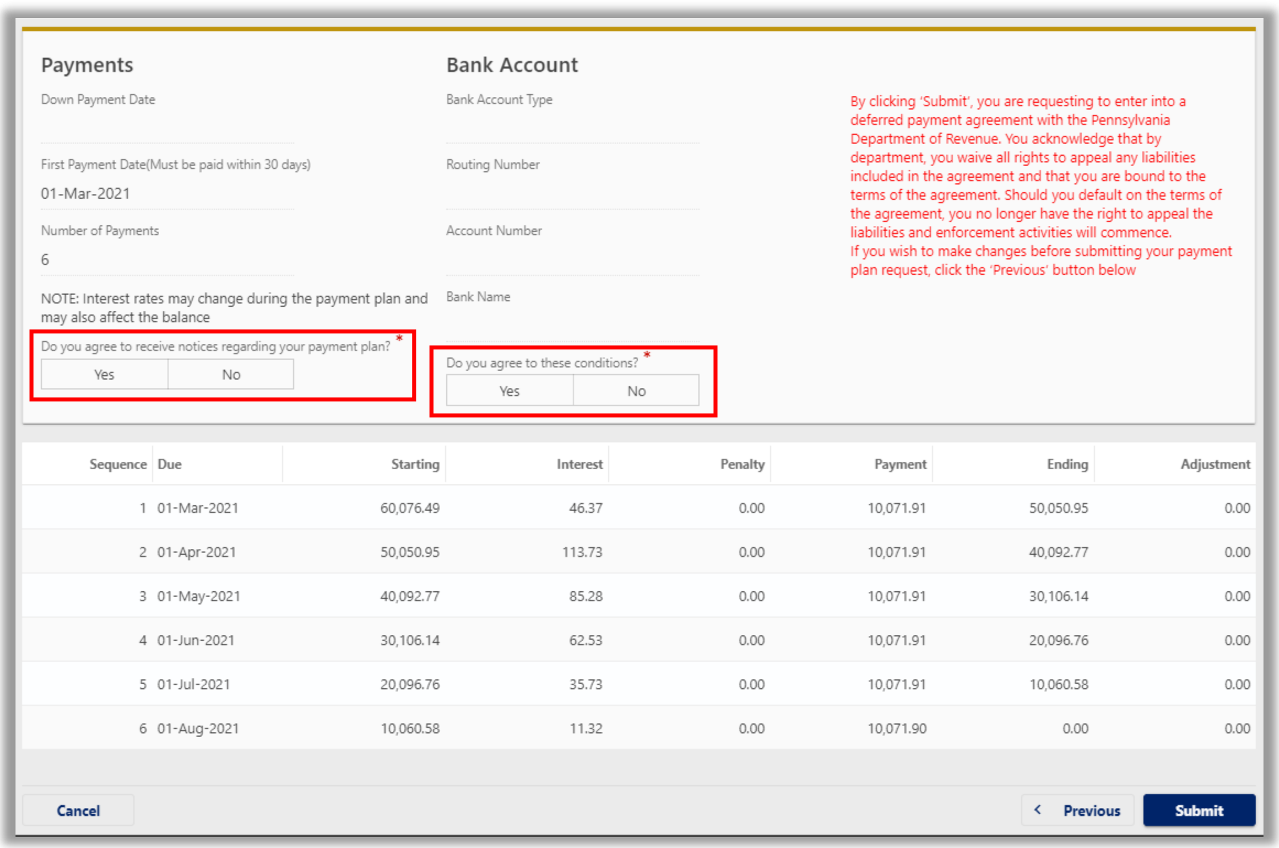
First Payment Date(Must be paid within 30 days) *

Required

Number of Payments *

Required

6. Review your **Payment Plan** summary and select **Yes** to **agree to receive notices** regarding your payment plan and **Yes** to **agree to the conditions** of the payment plan. Select **Submit** to activate your payment plan.



Payments

Down Payment Date

First Payment Date(Must be paid within 30 days)

01-Mar-2021

Number of Payments

6

NOTE: Interest rates may change during the payment plan and may also affect the balance

Do you agree to receive notices regarding your payment plan? *

Yes No

Bank Account

Bank Account Type

Routing Number

Account Number

Bank Name

Do you agree to these conditions? *

Yes No

By clicking 'Submit', you are requesting to enter into a deferred payment agreement with the Pennsylvania Department of Revenue. You acknowledge that by department, you waive all rights to appeal any liabilities included in the agreement and that you are bound to the terms of the agreement. Should you default on the terms of the agreement, you no longer have the right to appeal the liabilities and enforcement activities will commence.
If you wish to make changes before submitting your payment plan request, click the 'Previous' button below

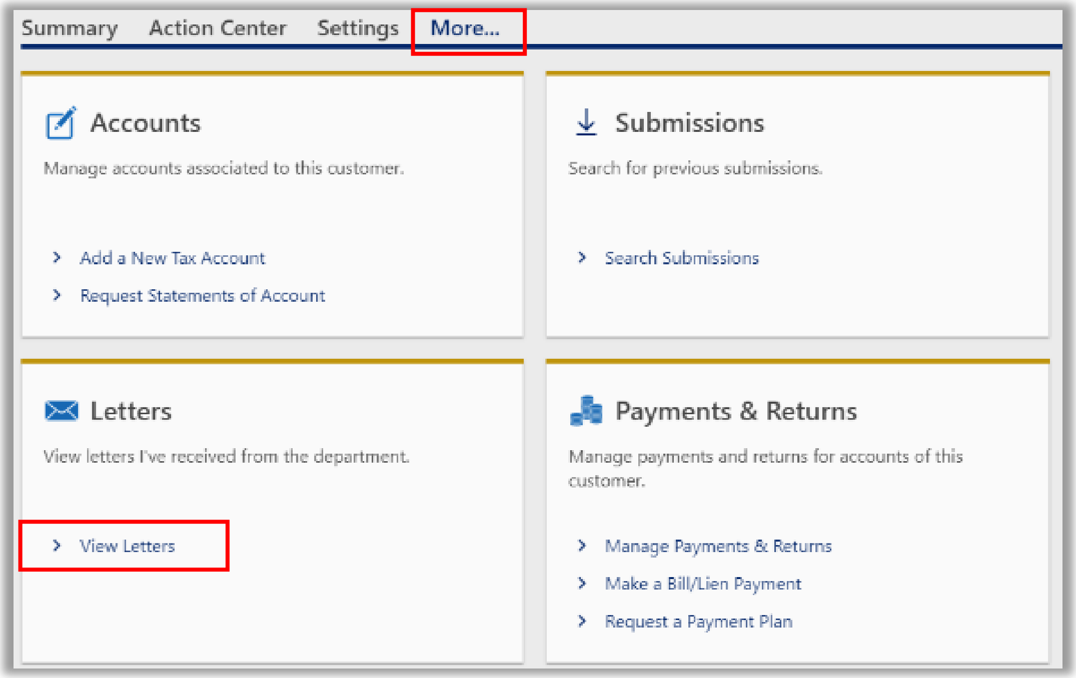
| Sequence | Due | Starting | Interest | Penalty | Payment | Ending | Adjustment |
|---|---|---|---|---|---|---|---|
| 1 | 01-Mar-2021 | 60,076.49 | 46.37 | 0.00 | 10,071.91 | 50,050.95 | 0.00 |
| 2 | 01-Apr-2021 | 50,050.95 | 113.73 | 0.00 | 10,071.91 | 40,092.77 | 0.00 |
| 3 | 01-May-2021 | 40,092.77 | 85.28 | 0.00 | 10,071.91 | 30,106.14 | 0.00 |
| 4 | 01-Jun-2021 | 30,106.14 | 62.53 | 0.00 | 10,071.91 | 20,096.76 | 0.00 |
| 5 | 01-Jul-2021 | 20,096.76 | 35.73 | 0.00 | 10,071.91 | 10,060.58 | 0.00 |
| 6 | 01-Aug-2021 | 10,060.58 | 11.32 | 0.00 | 10,071.90 | 0.00 | 0.00 |

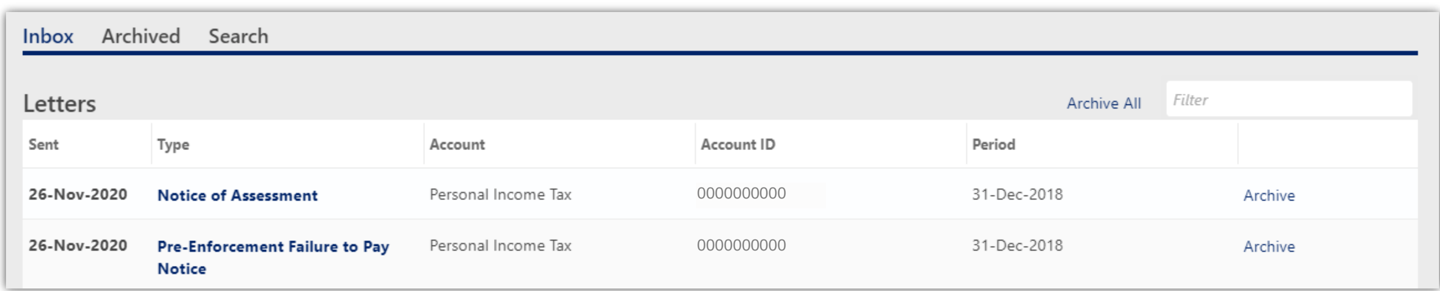
Cancel

< Previous Submit

## VIEW LETTERS

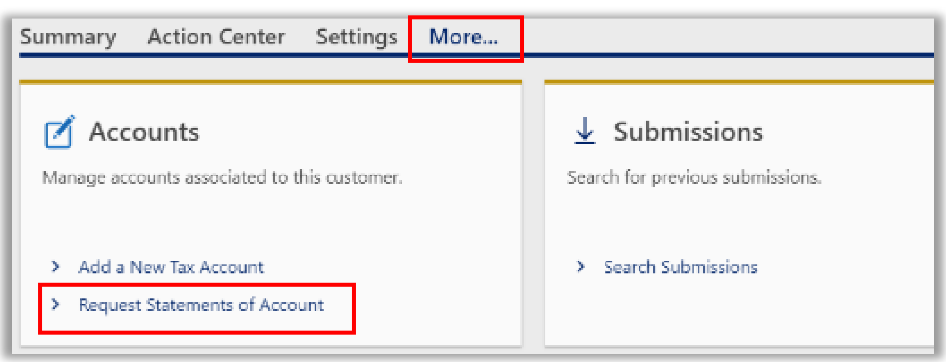
You can view letters you received from the department. To view your letters, select **More…**, then select **View Letters** from the *Letters* panel:




## REQUEST A STATEMENT OF ACCOUNT

Select **More…**, then select **Request a Statements of Account** from the *Accounts* panel. **Choose the account(s)** for which you would like to request a statement and select **Submit**. The statement of account will be available with your other letters **within 24 hours**.



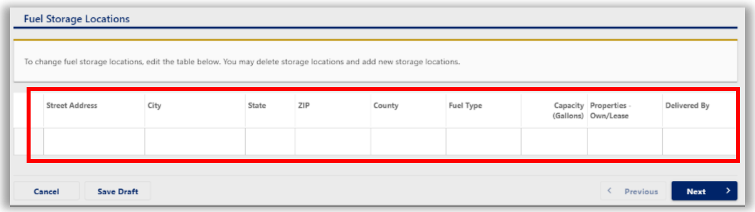
# Logged In Features

## MOTOR AND ALTERNATIVE FUEL TAX

### EDIT FUEL STORAGE LOCATIONS:

1. Log in with the **username** and **password**
2. Select **Edit Alternative/Motor Fuel Storage Locations** next to the tax account on the *Summary* page.


3. Enter the location information into the table and select **Next**, then **Submit**

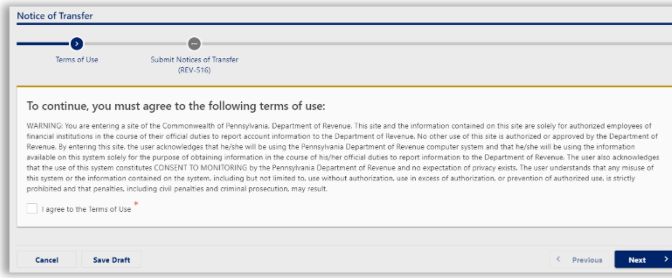



## FINANCIAL INSTITUTION INHERITANCE REPORTING

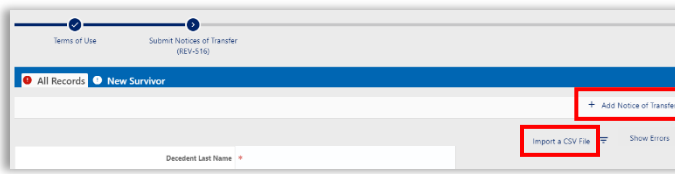
### NOTICE OF TRANSFER/DECEDENT ACCT. STATUS

1. Log in with the **username** and **password**
2. Select **Submit Notice of Transfer** next to the tax account on the *Summary* page.

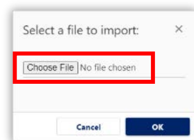

3. Agree to the **Terms of Use** and select **Next**




4. Select **Add Notice of Transfer/Add Notice of Decedent Account Status** and complete required information

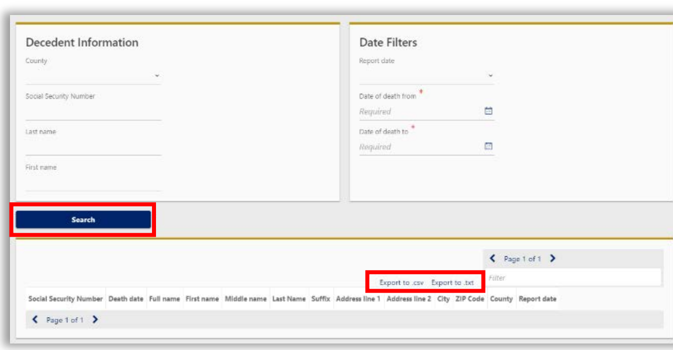



5. Select **Import a CSV File**, then select **Choose File** and select **OK** to upload a file




### SEARCH DECEDENT LISTING

1. Select **Search Decedent Listing** next to the tax account on the *Summary* page
2. Agree to the **Terms of Use** and select **Continue**
3. Enter the information and select **Search**. Results may be exported.

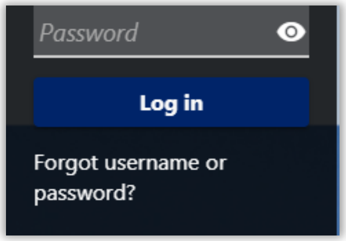


pennsylvania
DEPARTMENT OF REVENUE
www.revenue.pa.gov

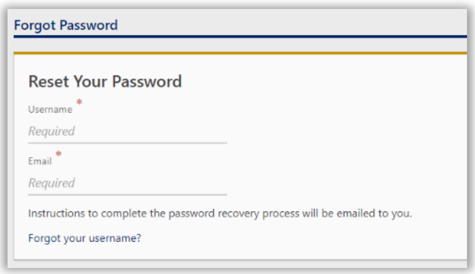
# Troubleshooting & Resources

## FORGOT USERNAME

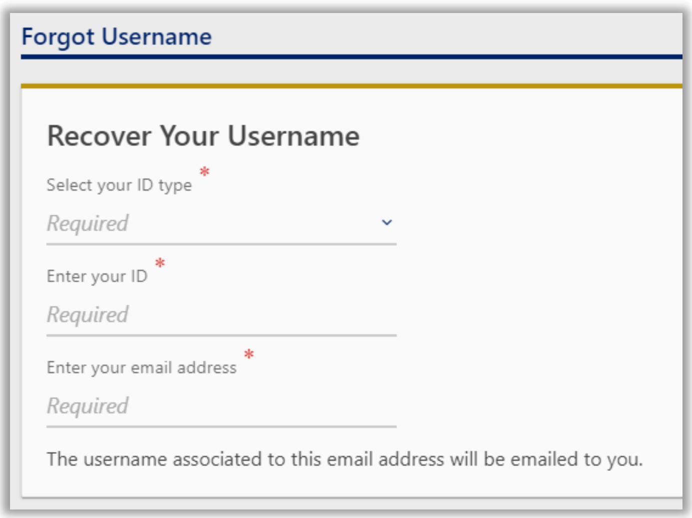
- To recover your username, select **Forgot username or password?** from the *Log In* panel




- Select **Forgot your username?**

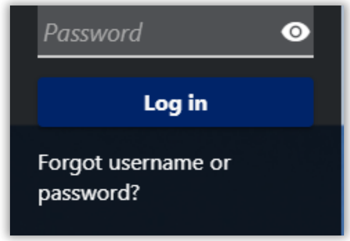



- Select the **ID Type** from the drop-down menu (Social Security Number or Federal Employer ID Number) and enter your **ID**
- Enter the **email address** associated to your profile to have the **username emailed to you.**

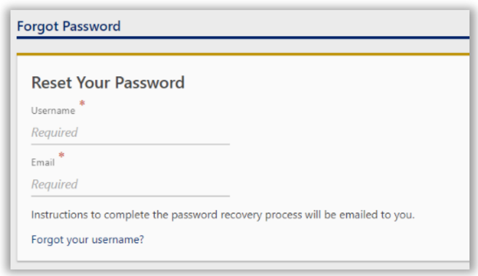



## FORGOT PASSWORD

- To reset your password, select **Forgot username or password?** from the Log In panel




- Enter your **Username** and the **email address** associated with your profile
- Select **Submit** to have password recovery instructions to emailed to you




**IMPORTANT:** You will not be able to reset your password if you have **not received and verified the Letter ID from your myPATH Access Letter** and have not set up your **Secret Question and Answer**. See the **Resources** section below for assistance from an agent.

## LOCKED OUT:

myPATH will lock users out **after too many unsuccessful attempts** to enter information. Typically, users that are locked out of myPATH are **reset within 24 hours**. However, if you are locked out of your **myPATH profile**, you may **contact the department** for assistance. See the **Ways to Contact Us** section on the next page.

^
RETURN TO TABLE OF CONTENTS

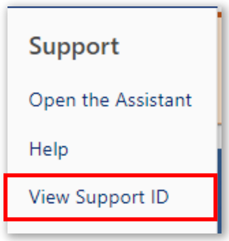
## CONTACTING THE DEPARTMENT

### OBTAINING THE SUPPORT ID

The best way to receive assistance from the Department of Revenue is to obtain your Support ID. The Support ID is a provided to you through myPATH which can allow a department representative to view your myPATH interactions and pinpoint the source of any technical difficulties.

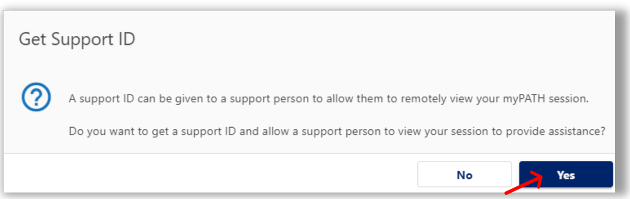
1. Click on the  **icon** in the top right-hand corner.

2. Under the Support menu, click on **View Support ID.**

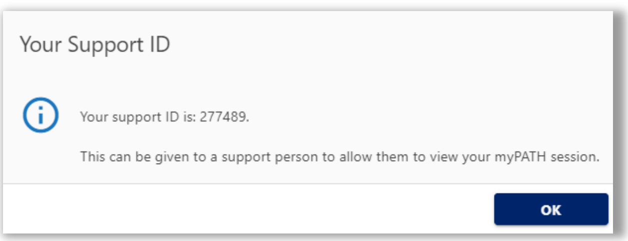



3. You will receive a pop-up screen stating “A support ID can be given to a support person to allow them to remotely view your myPATH session. Do you want to get a support ID and allow a support person to view your session to provide assistance?”

   Click, **yes**.




4. Once you receive the Support ID number, provide it to the department representative and then click **OK**.




### WAYS TO CONTACT US

**myPATH FAQs:** **[Online Customer Service Center]**

**Email:** myPATH@pa.gov

**Call: 717-425-2495** ext. **PATH1**