



# Getting Started with myPATH: Financial Institutions

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# PENNSYLVANIA TAX HUB

## Getting Started with myPATH: Financial Institutions

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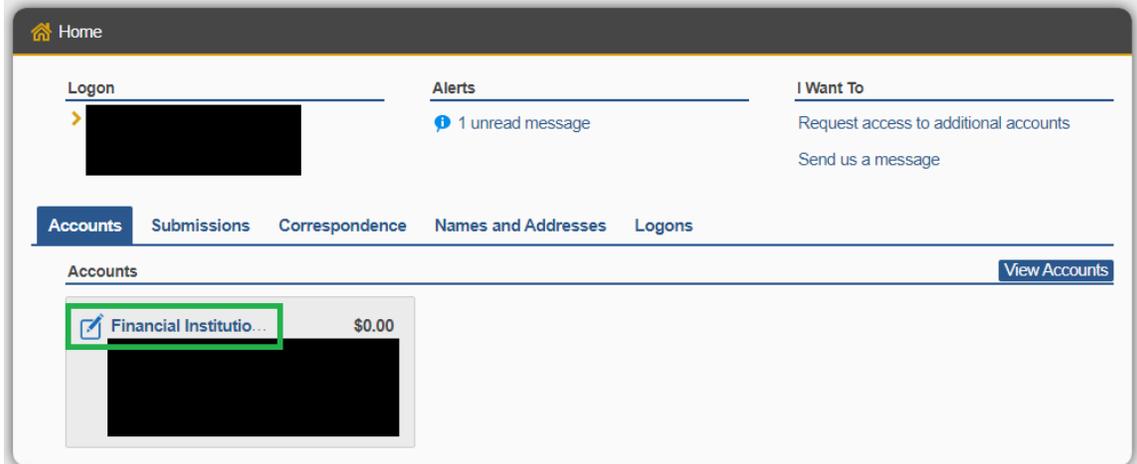
### Registration

1. Navigate to **mypath.pa.gov** in your web browser
2. Click **Sign Up for myPATH** to begin registration
3. Provide profile and user information as instructed
4. Have your **Account ID Number** ready and enter it upon instruction; you should have received a physical welcome letter in the mail from the Pennsylvania Department of Revenue containing this information
5. If all information is valid, submit the registration request and sign in on the main page of **mypath.pa.gov**

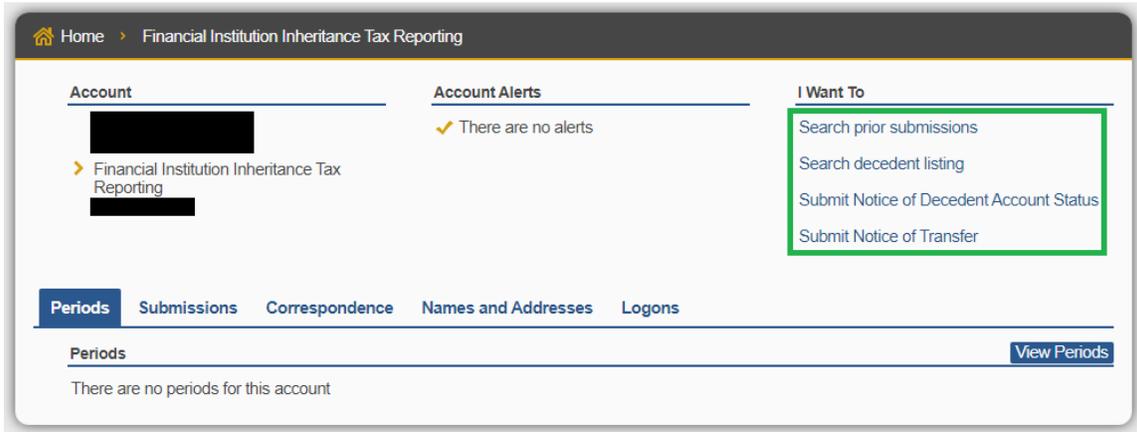
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## Locating your Account

1. On the first screen after logging in, click the **Financial Institution Inheritance Tax Reporting** account link



2. Your screen should now look similar to the screenshot below. Notice that there are four possible actions that can be taken in the **I Want To** section to the right of the screen



## Search Decedent Listing

1. Click the Search decedent listing link
2. Enter search criteria and click **Search**
3. This data can be printed from your browser, exported to a CSV file by clicking **Export to .csv**, or exported to a TXT file by clicking **Export to .txt**

Home > Financial Institution Inheritance Tax Reporting > Account

Terms of Use **Search decedent listing**

**Decedent Info**

Last Name  First Name  Social Security Number  County

**Search By Dates**

Report Dates  Date of Death From  Date of Death To  **Search**

Required when a report date is not selected

**Export to .csv** **Export to .txt** **Filter**

1 of 1 No rows to display.

SSN	Death Date	Full Name	First Name	Middle Name	Last Name	Suffix	Address Line 1	Address Line 2	City	Zip	County	Report Date
1 of 1 No rows to display.												

## Submit Notices of Decedent Account Status (REV-1549)

1. Click the Submit Notice of Decedent Account Status link
2. You may manually enter information by clicking **Add Notice of Decedent Account Status**
  - a. You may include additional transferees for a single decedent by clicking **Copy row** and editing the **Transferee Information** of the new row
  - b. You may include additional accounts for a single decedent by clicking **Copy row** and editing the **Account Information** and **Transferee Information** of the new row

### Submit Notices of Decedent Account Status (REV-1549)

**Import a CSV file**

**Decedent Account Status**

**All Records** **Add Notice of Decedent Account Status**

Decedent Last Name
Decedent First Name
Decedent Middle Name
Decedent SSN
Decedent Date of Death

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- You may import a CSV file by clicking the **Import button** located to the bottom-right of the page

Survivor Address Line 1  
*Required*

Survivor Address Line 2

Survivor City  
*Required*

Survivor State  
*Required*

Survivor ZIP Code  
*Required*

Delete Notice of Decedent Account Status Copy row Add Notice of Decedent Account Status

Save Draft Cancel Previous Submit

Import

- You may view all records in a table view by clicking the **All Records** tab to the top-left corner of the page **All Records**
- Submit the request when ready; you may edit this submission for the next 24 hours until it is processed

## Submit Notices of Transfer (REV-516)

- Click the Submit Notice of Transfer link
- You may manually enter information by clicking **Add Notice of Transfer**
  - You may include additional transferees for a single decedent by clicking **Copy row** and editing the **Transferee Information** of the new row
  - You may include additional accounts for a single decedent by clicking **Copy row** and editing the **Account Information** and **Transferee Information** of the new row

Submit Notices of Transfer (REV-516)

Import a CSV file

Notice of Transfer

All Records Add Notice of Transfer

Decedent Last Name
Decedent First Name
Decedent Middle Name
Decedent SSN
Decedent Date of Death

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3. You may import a CSV file by clicking the **Import button** located to the bottom-right of the page

Survivor Address Line 1  
*Required*

Survivor Address Line 2

Survivor City *Required* Survivor State *Required* Survivor ZIP Code *Required*

Delete Notice of Transfer Copy row Add Notice of Transfer

Save Draft Cancel < Previous Submit

**Import**

4. You may view all records in a table view by clicking the **All Records** tab to the top-left corner of the page **All Records**
5. Submit the request when ready; you may edit this submission for the next 24 hours until it is processed

## Search Prior Submissions

1. Click the Search prior submissions link
2. Enter a decedent **Social Security Number** and click **Search**

Home > Financial Institution Inheritance Tax Reporting > Search prior submissions

**Search prior submissions** Terms of Use

Decedent Name Institution Name Social Security Number *Required* Search

Account List

Account	Balance	Account Type	Status	Submit Date
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Add Notice of Decedent Account Status Add Notice of Transfer

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3. If a result is returned, you may view the prior submission by clicking the **Account** number in the left-most column.

Home > Financial Institution Inheritance Tax Reporting > Search prior submissions

**Search prior submissions** Terms of Use

Decedent Name [Redacted] Institution Name [Redacted] Social Security Number [Redacted] Search

**Account List**

Account	Balance	Account Type	Status	Submit Date
1	1.00	Capital Stock	Submitted	29-Nov-2019

Add Notice of Decedent Account Status Add Notice of Transfer

4. You may **View**, **Edit**, or **Delete** the submission by clicking one of the links in the **I Want To** section to the right of the screen. Note: submissions may only be edited or deleted within the first 24 hours after submission.

Home > Financial Institution Inheritance Tax Reporting > Search prior submissions > Notice of Transfer

**Submission** [Redacted]  
Financial Institution Inheritance Tax Reporting  
[Redacted]  
> Submission  
Notice of Transfer

**Status**  
✔ Submitted  
Confirmation # [Redacted]  
Submitted 29-Nov-2019 12:47:04

**I Want To**  
View Submission  
Edit Submission  
Delete Submission

5. You have the option to search for a Decedent SSN (as is done in Step 2), and pre-populate the decedent Social Security Number and decedent name into a new Notice of Decedent Account Status or Notice of Transfer submission.
  - a. To do so, click **Add Notice of Decedent Account Status** or **Add Notice of Transfer**

Home > Financial Institution Inheritance Tax Reporting > Search prior submissions

**Search prior submissions** Terms of Use

Decedent Name [Redacted] Institution Name [Redacted] Social Security Number [Redacted] Search

**Account List**

Account	Balance	Account Type	Status	Submit Date
1	1.00	Capital Stock	Submitted	29-Nov-2019

Add Notice of Decedent Account Status Add Notice of Transfer