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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 some of the department’s e-Services. 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?

Please refer to the chart below to see what taxes and programs are available in myPATH:

- Alternative Fuels Tax
- Cigarette Fire Safe Certification
- Cigarette PACT Act Reporting
- Cigarette Stamping Agent
- Cigarette Wholesaler
- Cooperative Agriculture Association Tax
- Electric Cooperative Corporation Tax
- Fuel Transporter
- Inheritance Tax
- International Fuel Tax (IFTA)
- Medical Marijuana Tax
- Motor Carrier Road Tax (MCRT)
- Motor Fuels Tax
- Realty Transfer Tax
- Pass-Through Entity
- Personal Income Tax
- Property Tax/Rent Rebate
- Pari-Mutuel Wagering Tax
- Tavern Games Distributor Tax
- Tavern Games Licensee Tax

### CAPABILITIES BY TAX TYPE

<table>
<thead>
<tr>
<th>Tax/Program Type</th>
<th>File Returns &amp; Reports</th>
<th>Check Status</th>
<th>Remit Payments</th>
<th>Register New Account</th>
<th>Request Certifications, Permits, Stamps</th>
<th>View Notices &amp; Submit Correspondence</th>
<th>Penalty &amp; Interest Calculator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternative Fuels</td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Cigarette Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Cooperative Agriculture Association Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Electric Cooperative Corporation Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Fuel Transporter</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Inheritance Tax</td>
<td>X¹</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>International Fuel Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Medical Marijuana Tax</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Motor Carrier Road Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Motor Fuels Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Pari-Mutuel Wagering Tax</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Pass-Through Entity</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Personal Income Tax</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Property Tax/Rent Rebate</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Realty Transfer Tax</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Tavern Games Tax</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

2 Only payments for nonresidents can be made via myPATH. Residents must file and pay with the Register of Wills.
3 Estimated and extension payments for Personal Income Tax only.
4 Cigarette Fire Safe Certifications and Cigarette Stamps (stamping agents) 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**

**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:

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*
  - Pass-through Entity**
  - Personal Income Tax

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

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.

---

*Cannot remit estimated payments
**Cannot remit return voucher payments
## Wage Garnishment Payments

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

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter ID</td>
<td>Located on the upper right-hand corner of the notice</td>
</tr>
<tr>
<td>Garnishment ID</td>
<td>Located in the Garnishment Information of the notice</td>
</tr>
<tr>
<td>Employee Wages</td>
<td>Required to determine payment amount</td>
</tr>
<tr>
<td>Banking Information</td>
<td>Bank type, routing number, account number</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter ID</td>
<td>Located in the upper right-hand corner of the Order to Seize Funds notice</td>
</tr>
<tr>
<td>Garnishment ID</td>
<td>Located in the Garnishment Information of the notice</td>
</tr>
<tr>
<td>Banking Information</td>
<td>Bank type, routing number, account number</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Docket Number</td>
<td>Located in the upper right-hand corner of the Certified Copy of Lien notice</td>
</tr>
<tr>
<td>Letter ID</td>
<td>Located in the upper right-hand corner of the Certified Copy of Lien notice</td>
</tr>
<tr>
<td>Banking Information</td>
<td>Bank type, routing number, account number</td>
</tr>
</tbody>
</table>

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
**TRACING 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:

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carry Forward Credit amount from prior year</td>
<td>Amount listed as a carry over credit on the prior year tax return</td>
</tr>
<tr>
<td>Amount of an Estimated Payment paid for the current tax year</td>
<td>Bank/personal records</td>
</tr>
</tbody>
</table>

**CALCULATE PENALTY & INTEREST**

- **PENALTY & INTEREST CALCULATOR** – Determine if you owe any penalty or interest for the following tax types:
  - Consumer Cigarette Use/Excise Tax
  - Consumer Fireworks Tax
  - Cooperative Agriculture Association
  - Corporation Tax
  - Inheritance Tax
  - Motor & Alternative Fuels Tax
  - Personal Income Tax
  - Public Transportation Assistance Fund Tax
  - Realty Transfer Tax
  - Sales & Use Tax
  - Tavern Games Distributor Tax
  - Tavern Games Licensee Tax
  - Vehicle Rental Tax

You will need one of the following:

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** or the amount of carry forward credit requested from the prior tax year
6. Select **Search**
Filing & Tracking Returns & Applications

File a Personal Income Tax Return

- **FILE A PA PERSONAL INCOME TAX RETURN** – File the PA-40, Personal Income Tax return directly from the myPATH homepage. In addition to being available in English, the PA-40 **is also available in Spanish** for the first time beginning with the 2021 filing season.

- 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 to 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 (SSN)** or **Individual Tax Identification Number (ITIN)**
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**
Apply for a Property Tax/Rent Rebate

- 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:
  o Instant confirmation of successful filing
  o Fast processing of rebates with direct deposit
  o Error-reducing automatic calculators
  o User-friendly features

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
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**
HOMEPAGE FEATURES
- LETTERS, FORMS,
REGISTRATION,
& SUBMISSIONS
HOMEPAGE FEATURES - LETTERS, FORMS, REGISTRATION, & SUBMISSIONS

CHANGES TO LETTERS

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 ***-**-0000
Account ID 000000000

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.
**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.

---

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.
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

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

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter ID</td>
<td>Located in the upper right-hand corner of your Identity Verification Letter</td>
</tr>
<tr>
<td>Overpayment Amount from PA-40</td>
<td>Amount from Line 29 of your PA-40 for the tax year in question on your Identity Verification Letter</td>
</tr>
</tbody>
</table>

1. Select Take ID Verification Quiz from the Identity Verification 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

• ENTER VERIFICATION CODE – You will need the following information to verify your identity:

<table>
<thead>
<tr>
<th>Information</th>
<th>Location/Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verification Code</td>
<td>Located in the What you need to do section of your Identity Verification Notice</td>
</tr>
<tr>
<td>Overpayment Amount from PA-40</td>
<td>Amount from Line 29 of your PA-40 for the tax year in question on your Identity Verification Letter</td>
</tr>
</tbody>
</table>

1. Select Enter Verification Code from the Identity Verification 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 1099-G Overpayment & 1099-INT Interest**

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

1. Select **Verify 1099-G or 1099-INT 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. Indicate whether you are a **Business** or an **Individual**
5. Enter the **Business Name** or your **First** and **Last Name**
6. Select **Search**
**REGISTER NEW ENTITY** – Register for any of the following taxes:
- Motor Fuel Tax
- Alternative Fuels Tax
- International Fuel Tax Agreement (IFTA)
- Motor Carrier Road Tax
- Pennsylvania Fuel Transporter

You will need the following information before you begin:
- IDs
- Addresses
- Start dates
- 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**

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**

**Search for an Existing Submission**

- **Email**
  - Required
- **Confirmation Code**
  - Required

**Cancel**

**Submit**
This section covers the process of creating a myPATH profile and explores the features available only to logged in users. If you create a username and password to use myPATH as a tax account holder by providing your SSN/FEIN at the time of registration, your profile gives you full access to your own tax account information with the ability to also grant access to other myPATH users. If you create a profile as a third party tax professional, your profile allows you to access tax account information for your client once access has been granted by that client. When access is granted to another myPATH user, there are different types of access that define the customer-level security access assigned to that user. The chart below describes each access type and its purpose:

### ACCESS TYPES

<table>
<thead>
<tr>
<th>Access Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Master Administrator** | If you created a profile as a tax account holder, your profile is automatically assigned this access type. As the Master Administrator, you have full control of your own tax account information and profile settings. You can grant access to other myPATH users, such as an accountant or representative, and manage their ability to view, file, or pay on your behalf at any time. When granting access to another myPATH user, you may select to assign that user's access type as either Account Administrator or Account Manager, but you cannot assign them the Master Administrator access type. You can also create secondary logons that:  
  • Perform work on your behalf.  
  • May only have access to tax accounts that you have access to.  
  • Will lose access to tax accounts that you lose access to.  
  • Will have their profile cancelled if your profile is cancelled.  
  If you registered to use myPATH as a third party tax professional, you are not able to create secondary logons. Your third party user profile allows you to request access to your clients to manage tax information on their behalf. |
| **Account Administrator** | This is the suggested access type to assign to any other myPATH users who perform work on your behalf and can also manage the access other users have to your tax information. |
| **Account Manager** | This access type differs from the Account Administrator type by not having the ability to manage the security access other users have to your tax information. However, you may assign the Account Administrator access type to any myPATH user, including a third party tax professional, if you choose to allow them to also manage the security access of other users on your behalf. |

### 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 your **Social Security Number** and **Last Name**, **Federal Employer ID Number** and the **Business Name**, or **PATH ID** and **Customer 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.
HOW TO SIGN UP

Tax Account Holder (Master Administrator)

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

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

Secondary Logon

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

NOTE: To sign up as a Master Administrator, select No in the Identification panel to indicate you are not a third party 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.

continued on next page
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**

   ![Create a Logon for Someone Else](image)

   **Secondary Logons**
   - Perform work on your behalf
   - May only have access to customers and accounts that you have access to
   - Will lose access to customers and accounts that you lose access to
   - Will have their logons cancelled when your logon is cancelled
   - Can have their access managed for all customers and accounts

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.

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

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

   ![Log In](image)

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

   ![Electronic Correspondence and Communications Agreement](image)

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

   ![Profile](image)

**Third Party Tax Professional**

**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 a third party user by the Master Administrator (tax account holder). There are four different access levels the Master Administrator can assign to other users when managing or granting access to their tax account information.

The following chart lists the actions available to each access level:

<table>
<thead>
<tr>
<th>Access Level Description</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows the ability to view accounts, file returns, and make payments</td>
<td>File Returns and Make Payments</td>
</tr>
<tr>
<td>Allows the ability to view accounts and file returns</td>
<td>File Returns</td>
</tr>
<tr>
<td>Allows the ability to view accounts and make payments</td>
<td>Make Payments</td>
</tr>
<tr>
<td>Allows the ability to view accounts</td>
<td>View</td>
</tr>
</tbody>
</table>

**IMPORTANT:** View the section on how to set up **Two-Step Verification** and requesting an **Access Letter** to complete your registration.
Your client is required to create a Master Administrator 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.
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 code can be received via SMS (text message), email, or authentication app.

1. Log in with the **username** and **password**
2. Set up **Two-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.

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.

3. 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.
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

<table>
<thead>
<tr>
<th>Preference Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mail Delivery</strong></td>
<td><em>Paper</em> is the default for both the individual user and each tax account.</td>
</tr>
<tr>
<td></td>
<td>Update to email to receive letters from the department electronically.</td>
</tr>
<tr>
<td><strong>Mail Notification</strong></td>
<td><em>Notify me of new mail</em> is the default for both the individual user and each</td>
</tr>
<tr>
<td></td>
<td>tax account.</td>
</tr>
<tr>
<td><strong>Default Payment Channel</strong></td>
<td><em>None</em> is the default option (tax accounts only). Update to add banking</td>
</tr>
<tr>
<td></td>
<td>information for future use.</td>
</tr>
</tbody>
</table>
Profile & 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

Welcome, Victor Worthington
You last logged in on Wednesday, Jun 3, 2020 10:43:26 AM

Manage My Profile

Profile   Action Center   More...

Profile
Name: VICTOR WORTHINGTON
Update Name
My Email: vworthington@email.com
Change Email
My Phone Number: +1 (456) 123-2457
Edit Phone Number

Security
Password
Last changed: May 1
Change Password
Secret Question
In what city does your nearest sibling live?
Update Your Secret Question
Two-Step Verification Settings
Codes are sent via authentication app
Change Two-Step Settings
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

   **Account**
   
   0000000000
   
   **Balance**
   
   $8,170.35

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

   *For ACH Payments*, select the **Payment Type** and **Tax Year** from the respective drop-down 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.**

Make a Bill/Lien Payment

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

   **Summary**
   
   **Action Center**
   
   **Settings**
   
   **More...**

   **Payments & Returns**
   
   **Submissions**
   
   **Letters**
   
   **Accounts**
   
   Manage accounts associated to this customer.
   
   **Add a New Account**
   
   **Request Statements of Account**
   
   **Search for previous submissions.**
   
   **Search Submissions**

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

   **Make a Bill/Lien Payment**

   **Enter Your Notice Information**

   **Letter ID**
   
   L000000000
   
   The 11-character Letter ID is located in the top-right corner of your notice.

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

Return to Table of Contents
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 must be submitted with the check.

*Option only available for certain account types
LOGGED IN FEATURES

VIEW RETURNS & PERIODS

View return and period information for a specific account. For certain types of accounts you may also file/amend returns.

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.
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
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

   Please enter your banking information below:

   - Bank Account Type * Required
   - Routing Number * Required
   - Bank Name

   Account Number * Required
   Account Number Confirm * Required

   Account Type | Account ID | Filing Period | In Collection | Balance
   PERSONAL INCOME TAX | 00000000000000 | 31-Dec-2017 | Yes | 7,010.48
   PERSONAL INCOME TAX | 00000000000000 | 31-Dec-2019 | No | 53,068.01

   NOTE: Once your payment plan request has been submitted, payments will be automatically deducted from your bank account according to your payment plan agreement. Click the ‘next’ button to continue setting up your payment plan.
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 submitting 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

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

**LOGGED IN FEATURES**

**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:

1. Select More...
2. Select Request Statements of Account from the Accounts panel.
3. 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.

**REQUEST A STATEMENT OF ACCOUNT**

Select More..., then select Request 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.
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

Notice of Transfer/Decedent Account Status

1. Log in with the username and password
2. Select Submit Notice of Transfer or Submit Notice of Decedent Account Status 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
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 with 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 emailed to you

**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 Resources section below.

**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.
A myPATH Support ID is a unique code that allows our support staff to view a user’s current myPATH session while providing technical assistance. To retrieve your Support ID:

1. Select the ? icon from the top right-hand corner to open the Support menu.
2. Select View Support ID. A pop-up screen will appear.
3. By selecting Yes on the pop-up screen, a unique Support ID will be generated. You can provide this Support ID to an agent at the Department of Revenue to allow them to view your current myPATH session for technical assistance.

**Get Support ID**

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?

[Yes] [No]

**myPATH FAQs**

Online Customer Service Center
https://revenue-pa.custhelp.com/app/answers/list/c/307

Email
myPATH@pa.gov

Call
717-425-2495 ext. PATH1 (72841)