Getting Started with myPATH: Financial Institutions

Version: 1
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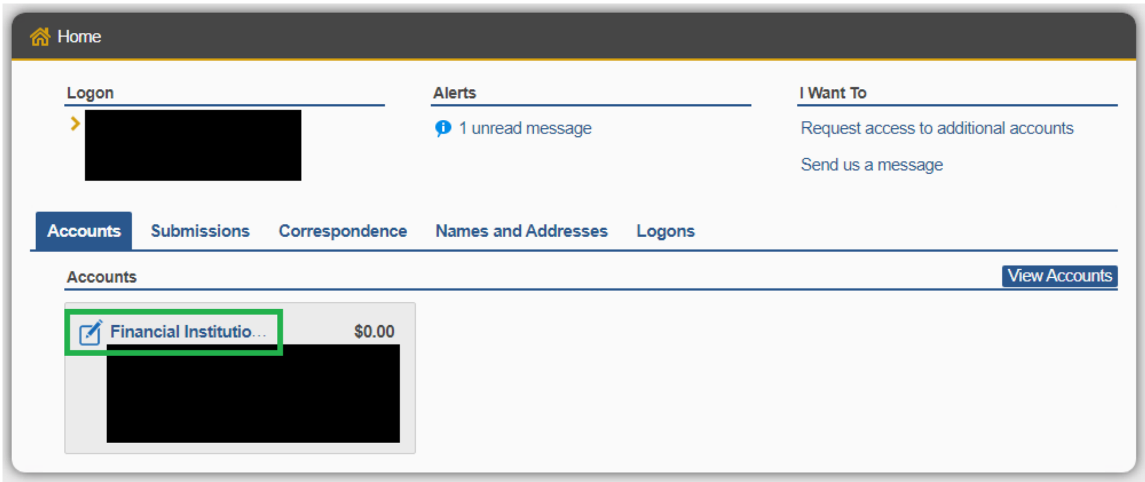
Registration

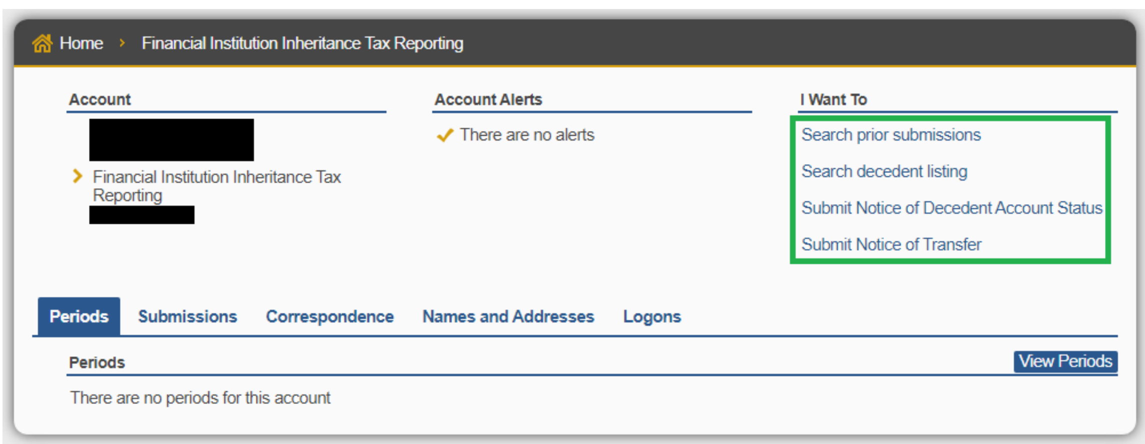
1. Navigate to **mypath.pa.gov** in your web browser
2. Click **Sign Up for myPATH** to begin registration
3. Provide profile and user information as instructed
4. Have your **Account ID Number** ready and enter it upon instruction; you should have received a physical welcome letter in the mail from 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**

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

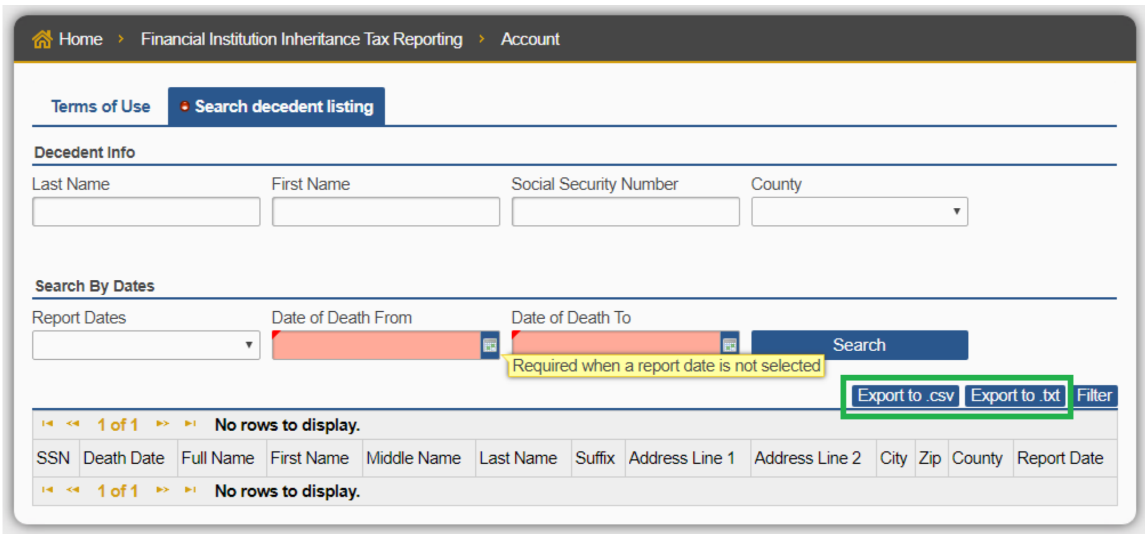


Search Decedent Listing

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**

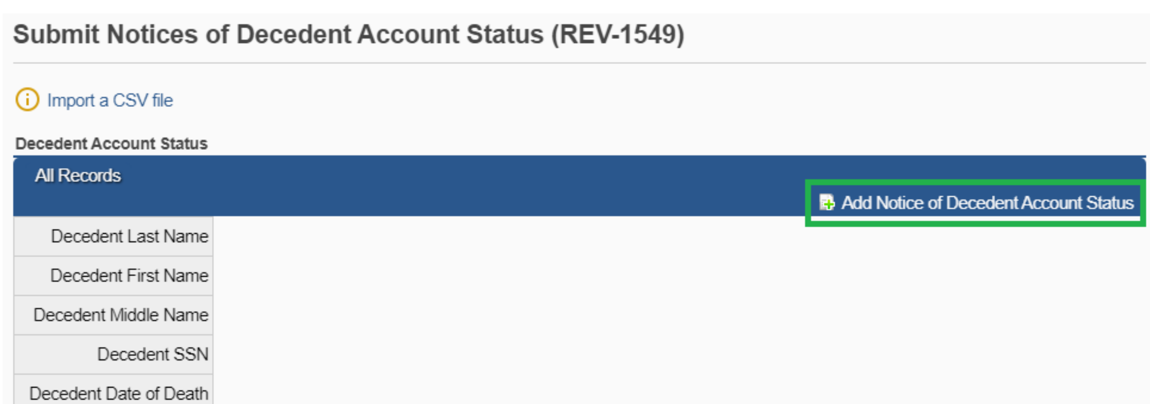


Submit Notices of Decedent Account Status (REV-1549)

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



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

4. You may view all records in a table view by clicking the **All Records** tab to the top-left corner of the page 

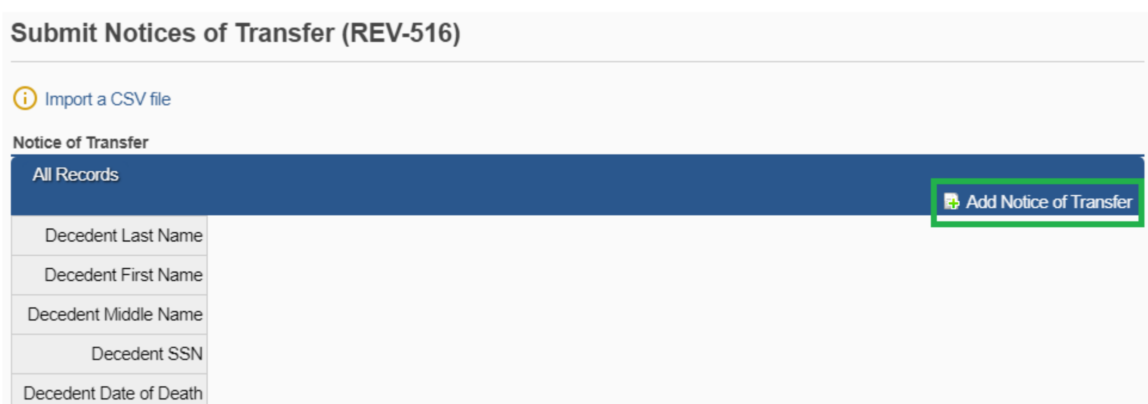
5. Submit the request when ready; you may edit this submission for the next 24 hours until it is processed

Submit Notices of Transfer (REV-516)

1. Click the Submit Notice of Transfer link

2. You may manually enter information by clicking **Add Notice of Transfer**

   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



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

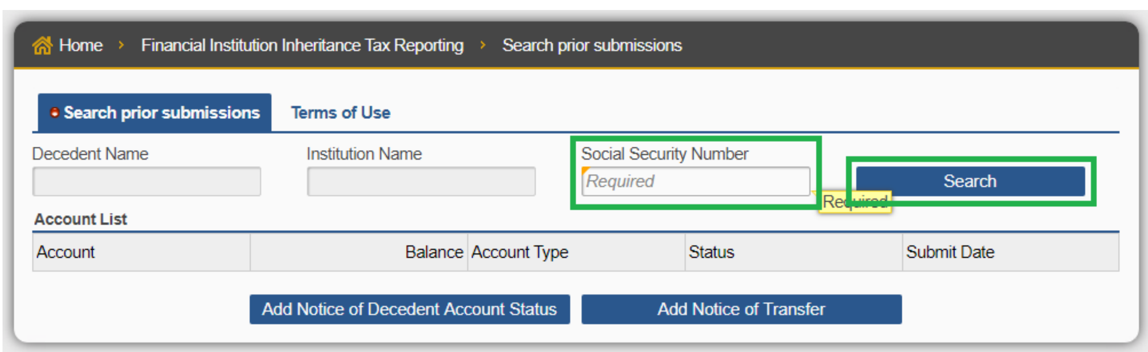
4. You may view all records in a table view by clicking the **All Records** tab to the top-left corner of the page 

5. Submit the request when ready; you may edit this submission for the next 24 hours until it is processed

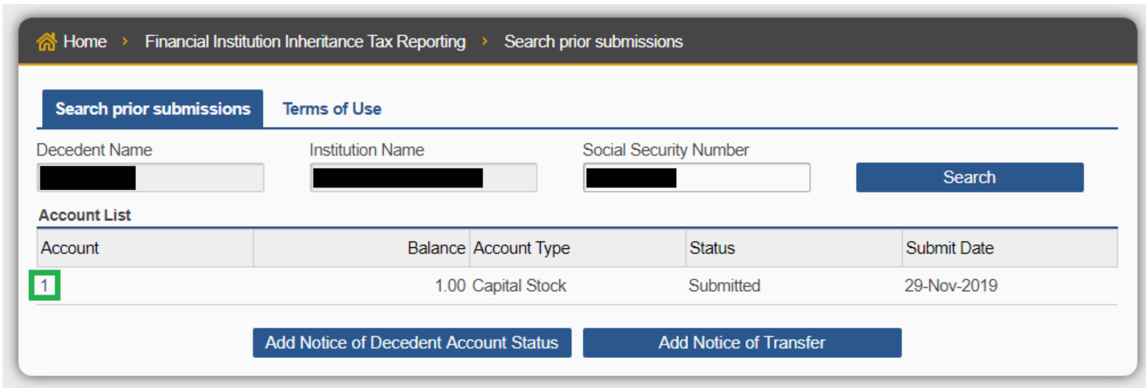
Search Prior Submissions

1. Click the Search prior submissions link

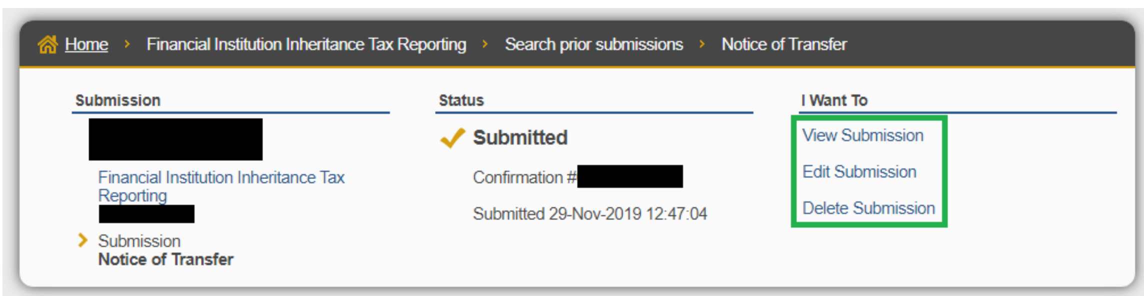
2. Enter a decedent **Social Security Number** and click **Search**



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



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.



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**