

# VERIFYING PAYMENTS AND CREDITS

The Pennsylvania Department of Revenue has several options that allow you to easily verify your client’s estimated payments, extension payments, and carry forward credits. These options apply to those practitioners who handle Fiduciary Tax Returns, Nonresident Consolidated Returns, Pass Through Entities and Personal Income Tax Returns.

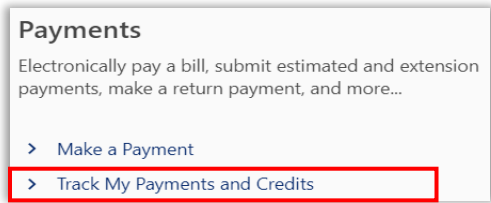
## myPATH

As a tax practitioner, we recommend that you create a Third-Party User Profile in myPATH and request access to your client’s account. Once this access is granted, you will have the ability to view all returns, payments or credits on the specific tax account in question.

If you are unable to create a user profile or you need access to this information immediately, you can verify payments or credits as a non-logged in function directly from the myPATH homepage. To do so, you will need to have the following:

- Client’s full social security number
- AND**
- Payment amount for any payment made for the tax year you are verifying
- OR**
- Amount of carry forward credit from the previous tax year

1. Visit the myPATH home page at [mypath.pa.gov](http://mypath.pa.gov).
2. Go to the **Payments** panel and click on **Track My Payments and Credits**.



3. Select the **tax year** for which you are verifying the payments as well as the **account type**. You will also need to enter the client’s **SSN or EIN** and if it was their **first-year** filing.

Tax year  
2020

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Account type  
Personal Income Tax

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Identification type \*

Social Security Number

Individual Taxpayer ID Number

Identification Number

4. You will also need to select if this is the first year your client has filed a PA tax return or not.

### FIRST TIME FILERS

If you selected **Yes** to it being the first year your client filed a tax return in PA, then you will only be able to use the amount of a payment made for that tax year.

First time filing PA return tax?

Yes

No

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In order for us to search for all your payments submitted to

Payment amount \*

*Required*

### RECURRING FILER

#### INDIVIDUALS/FIDUCIARY

If your client has filed in prior years, you will have the option to use **either** a payment from the requested tax year or using the carry forward credit from a prior year.

Search using a submitted payment for this tax year? *		Payment amount
Yes	No	0.00
Search using credit carry forward credits requested from prior year? *		Prior Credit Carry Forward amount
Yes	No	0.00

### NONRESIDENT CONSOLIDATED/PASS-THROUGH

Returning Nonresident Consolidated customers can search using an extension payment submitted to PA for the tax year in question.

Search using a submitted payment for this tax year? Payment amount \*

Yes

No

*Required*

5. After filling in the required information and hitting **search**, a screen will appear below listing all payments for the requested tax year.

## AUTOMATED PHONE LINE

To check the payments over the phone you will need the following:

- Client's full social security number  
**AND**
- Payment amount for first estimated payment made during the year you are verifying  
**OR**
- Original tax liability from the prior year tax return

- 1.) Call **1-888-PATAXES (888-728-2937)**
- 2.) Select **option 1** for verifying Personnel Income Tax return status and estimated/extension payments.
- 3.) Enter in the **SSN/EIN** and tax year you are inquiring about and then hit the # sign.
- 4.) Enter in the **tax year** for which you are calling then hit the # sign.
- 5.) You will then be asked if your client has filed their tax return for that year (**1 for yes, 2 for no**)

### OPTION 1: RETURN HAS BEEN FILED

If you select this option, you will only receive a status update on whether the return has been received/accepted and the returns current processing stage.

To verify estimated payments for a return already filed, you will need to use either:

- Visit the myPATH home page at [mypath.pa.gov](http://mypath.pa.gov).
- Go to the **Payments** panel and click on **Track My Payments and Credits**.

#### Payments

Electronically pay a bill, submit estimated and extension payments, make a return payment, and more...

- > Make a Payment
- > **Track My Payments and Credits**

- Then follow the prompts.  
**OR**
- Select option #2 on the Automated Phone Line and follow the necessary prompts.

### OPTION 2: RETURN HAS NOT YET BEEN FILED

If a return has not yet been filed, you will be given two options on how to verify your client. When entering payment amounts, only use whole dollar amounts and do not account for cents.

**Option 1:** Enter in the amount of the **first quarter payment** for the year you are inquiring about.

**Note:** If your client did not make a payment in the first quarter, do not use this option as the system does not accept \$0 as a valid amount.

**Option 2:** Enter in the amount of the **previous tax years** liability.

Once confirmed, the system will then give you the payment amounts made for the tax year.