

PTIN RENEWAL & SUBMISSION

ACCESS PTIN RENEWAL THROUGH IRS WEBSITE

TYPE WWW.IRS.GOV IN BROWSER

Click on Tax Pros in top right corner



UNDER PTIN SYSTEM

Click on Register or Renew

ØIRS		Help News Lang	Jage 🗸 Charities & Nonprof	Q its Tax Pros
File Pay	Refunds Credi	ts & Deductions	Forms & Instructions	
12 > Tax Professionals	5			Fnglish
inrolled Agents Innual Filing Season Program ^a articipants Enrolled Retirement Plan Agents	e-Services	inals Access E	-Services PTI	N System tus: Online iew or register for 0 by Dec. 31
Certified Professional Employer Organization (CPEO)				Renew or Register
Enrolled Actuaries	Donular			
E-File Providers	Popular	Propager Tay Ide	ntification Number	NHC .
Modernized e-File	Industry Industry	Privater Tak Ide (PTIN) Guidance Power Of Attorns Notice or Letter Fraud or Scam Where to File	ey (POA) Earling Verian More More More More More More More More	Ivreporting laces Form W-2 fication Code re News

ACCESSING PTIN ACCOUNT

 Renewing PTIN holders – login using credentials (username is email address used to create PTIN account)

IRS Tax Professiona	al PTIN System	
This online system allows you to sign-up an your continuing education credits, and rec SYSTEM STATUS: Sign-up and Renewal a	nd renew your Preparer Tax Identification Number (P eive communications from the IRS Return Preparer Offi pplications for the 2020 calendar year are now availu	TIN), keep your account information current, vie e. able.
Returning User User ID: Username Password: Password	New User You should only create a PTIN account if you 1) prepare federal tax returns for compensation, 2) are an enrolled agent, or 3) intend to become an enrolled agent.	Frequently Asked Questions How do Laccess my online account? How do Lenew my PTIN? How do Lsign up for a new PTIN PTIN? Lsigned up for a new PTIN but how do Lkow my PTIN Status?
Sign In Forgot password2	Create Account	Do I need a PTIN2 How do I submit a name change request2 What is the Annual Filting Season

 If you do not remember password, Complete FORGOT Password steps New PTIN registrants will create a PTIN account

WIRS

IRS Tax Professional PTIN System

This online system allows you to sign-up and renew your **Preparer Tax Identification Number (PTIN)**, keep your account information current, view your continuing education credits, and receive communications from the IRS Return Preparer Office. **SYSTEM STATUS: Sign-up and Renewal applications for the 2020 calendar year are now available.**



PTIN ACCOUNT MAIN MENU

- 2020 Renewal Option
- Click on SELECT Button

		Logged i	140 DOE, JANE
		Latt	ogin Information I Log
		My PTIN Information	Show Details
tion you wish to perform.		PTIN: PTIN Status: A	P01234567 ctive
2020 Renewal	Select		
	ton you wish to perform. 2020 Renewal	ton you wish to perform.	Logged A Edit L ton you wish to perform. 2020 Renewal Select

- NOTE: New Registrants most often will select **2020 PTIN signup with SSN**
 - If one of the other options address certain situations relevant to you:
 - Have never filed tax return or do not have SSN, select the appropriate option

ANSWER SUITABILITY QUESTIONS

Felony Conviction

Renewal - F	Felony I	informa	tion
-------------	----------	---------	------

Felony Information

Disclose your felony convictions below (if any).

Each year, applicants are required to fully disclose any information concerning felony convictions. A felony conviction may not necessarily discussify you from cotaming a PTIN. However, generally, a perion who is currently incarcerated for any from conviction will not be permitted to other on renew a PTIN.

Use the space below to provide details of ran felony conviction(s). Providing failse or micreading information on this application is a criminal offense that may result in protection and criminal preatities. All facts and circumstances will be considered. You will be constabled of addressal information is needed.

Fields marked with ""are required

•	Have you been convicted of a falony in the last 10 years?	⊙ Yes ⊛ No
	Felony Explanation: 🧕	
	Previous Next	Cancel

• Tax Compliance

Renewal - Tax Compliance

Tax Compliance

Indicate your individual and business tax compliance below.

As a PTIN holder, you are expected to be in compliance with federal tax laws and timely file all returns and pay all taxes, or make acceptable payment arrangements.

Answer the question below. If you select "No", use the space provided to explain the details of your tax compliance issue(s), including the steps you have taken to resolve the issue. Providing faite or misleading information on this application is a orminal offense that could result in prosecution and criminal penalties. All facts and circumstances will be considered, hou will be contacted if additional information is needed. If you have never field a U.S. includual income fax return because you are not negarised to do so, solid-if 'yes' below.

Fields marked with "" are required. Are you current with your fiderail moviesal and business taxes including any corporate and employment tax colepations?

if no, please provide an explanation:

Previous Next Cancel

CONFIRM INFORMATION

Review all sections to verify information is accurate.

Pay close attention to the business address listed and update if needed.

EFIN field should be BLANK – if EFIN is listed, please remove it from your PTIN record.

 Click EDIT button in the appropriate section to make necessary change

Renewal - Review Your Information Carefully review your information below. If it is correct, select "Next" Application Application Date: 10/17/2017 Full Name: Edit Personal Jane Doe Information Social Security Number Birthdate: 1/1/1974 Personal Mailing Address 24 ARBOR LANE Contact Edit Information Calhoun, GA 30701 US 706-602-0597 Phone Number: Email: sherim@ptstax.com **Business Address** 113 N Park Avenue Calhoun, GA 30701 US Business Edit Information **Business Name Dusiness Web Site:** Are you self-employed or an owner or partner or officer of a tax preparation business? If yes, provide the numbers below as applicable. Yes

SIGN YOUR APPLICATION

- Click YES to electronically sign application
- Click SUBMIT

2020 Renewal - Sign Your Ap	oplication
Review and agree to the statement below	w before submitting.
Under penalty of perjury, I declare that I is	have examined this application and read all accompanying information and, to my best
knowledge and belief, the information on	ovided is true, correct and complete. I understand any false or misleading information may result
in criminal penalties and/or the denial or	termination of a PTIN.
Yes - I have read and agree to the	e statement above.
No - I do not agree to the statement	ent above.
Previous Submit	Cancel

VIEW SUMMARY REPORT

Click VIEW SUMMARY REPORT

@IRS	
P01234567	Loggest in and DOE, JANE Main Menn 1 Life Login Information 1 Login
Summary Report Congratuational Your PT/IV renewal application has been successfully submitted. Sets Your "Active" PTIN and its updated Expression Date are provided at the top-right come You must use this number on any fax return or clerin for refund you sign as a paid law enable to you within 24 nous.	ct "Vew PDF Summary Report" to print a copy for your records. of the Nam Manu. Your PTIM is now valid for the 2017 and 2018 calendar years. elum preparer. A veloance letter containing your PTIN and additional guidance will be
Main Many View PDF Summary Report	ur ⁴
4	
U	

 Select DOWNLOAD option in top right corner



PTIN WELCOME LETTER

 Email notification will arrive within 24 – 48 hours of PTIN renewal/registration

Reply G	Reply All SForward Tue 10/17/2017 4:46 PM TaxPro_PTIN@irs.gov PTIN Renewal Welcome Letter oe	SAM	PLE
Dear Tax F	Professional,	EMAIL	
You have a into your P you are log your user I screen.	a new message in your online PTIN accou TIN account and enter your user ID and p gged in, select "View Your Messages" fron D or password, select "Forgot User ID" or	nt mailbox. To view the message, log assword under "returning users". Once n the Main Menu. If you do not remember "Forgot Password" from the login	
*** Note: T This messa otherwise p immediatel	his is an automated email. Do NOT reply t age is for the designated recipient only an private information. If you have received th ly. Any other use of the email by you is pro	to this message. d may contain privileged, proprietary, or his email in error, please delete it hibited.	

- Login PTIN account
- Click SELECT beside VIEW MESSAGES
 on main menu



DOWNLOAD PTIN WELCOME LETTER

• Click OPEN to view pdf letter



Click DOWNLOAD in top right corner



- File will be saved in Download file on PC
- NOTE: consider renaming file using following format; Name EFIN 2020 PTIN (our example would label record: Jane Doe 876543 2020 PTIN)

SUBMIT PTIN TO PTS

PTIN information MUST BE RECEIVED to allow access to

2019 Tax Program

VISIT SUNSET UNIVERSITY SITE

- sunset.ptsuniversity.com
- Select 2020 PTIN Submission from menu bar

Sunset University - Home × +
← → C ☆ ③ Not secure sunset.ptsuniversity.com
HOME TAX CHAT 2020 TAX COMMITMENT SUNSET FINANCE WEBSITE SUNSET ELECTRONIC TITLE PROCESSING WEBINAR
AUTHORIZATION OF SERVICES AND DISCLOSURE TAX TIP 2017-06 2017 SUR FY 2020 PTIN SUBMISSION P B GATEWAY RCI
2019 NETSPEND PREPAID DEBIT CARD TRAINING 2019 NETSPEND PREPAID CARD QUICK REFERENCE PTS RESCUE
Welcome to Sunset University

PROVIDE DATA



All fields are necessary to assure login credentials in 2019 tax program allow access to correct location.



List office email address to assure receipt of login credentials.

UPLOAD PTIN WELCOME LETTER

Click BROWSE FILES to attach PTIN
 welcome letter

or	ffice	123456			
	FIN *	6 digits			
Pr	reparer	Jane	Doe		
N	ame *	First Name and	Last Name as listed on PTIN	registration	
P	TIN *	P01234567			
P ² E2	TIN kpires *	2018 12/31/YYYY			
E-	mail *	ABC.AL@wester	 No 		
W	umber of	2			
ye provide the second sec	ears reparing xes	Click Bi select do PTIN wo	rowse Files - wnloaded elcome letter		
	pload our file ere.	Brows	se Files		
			Submit		11

- Look in DOWNLOAD files on your PC
- Select correct document to attach *renaming the file will simplify identifying your letter

Open				×	- 0	×
- ← → · · ↑ 🗣 > This PC > Downloads			✓ Ö Search Down	oads 🔎		
Organize 👻 New folder						A .
^ Name	Date modified	Туре	Size	^		
Quick access Ded76167-8c26-48e6-9452-e8965edb2a60	10/19/2017 10:26	Adobe Acrobat D	137 KB			
OneDrive - PTS 2 0ed76167-8c26-48e6-9452-e8965edb2a60	10/17/2017 5:09 PM	Adobe Acrobat D	137 KB			
a PTS						
PTS Tax - Docum						
🛃 PTS Tax Admin 4						
This PC						
Desktop						-
Documents						
👆 Downloads					1000	
h Music						
E Pictures						
Videos						
🛀 OS (C:)					,	
File name: 0cd76167-9c26-49c6-9452-e9965cdb2560			All Filer	~		
The nume 064/0107-0020-4060-5432-60505602800						
			Open	Cancel		
First year Ves	NO					
with PT3?						
Number of 2						
years						
taxes						

VERIFY INFORMATION PROVIDED

• Assure appropriate file has been attached



- Confirm valid office email is listed
- Once verification is complete, click SUBMIT

• Scroll through record to assure all data is correct

Preparer Name *	Jane Doe First Name and Last Name as listed on PTIN registration	
PTIN *	P01234567	
PTIN Expires *	2018	
E-mail *	ABC AL@westernshamrockcorp.com	
First year with PTS7	🕐 Yes 🔹 No	
Number of years preparing taxes	20	
Upload your file	Browse Files	
Dee.	Suffret Auto-Beachart of 198	

SUBMISSION CONFIRMATION

• Notice of submission of records



• Email notification



CONGRATULATIONS!

You have completed the PTIN renewal and submission process!