

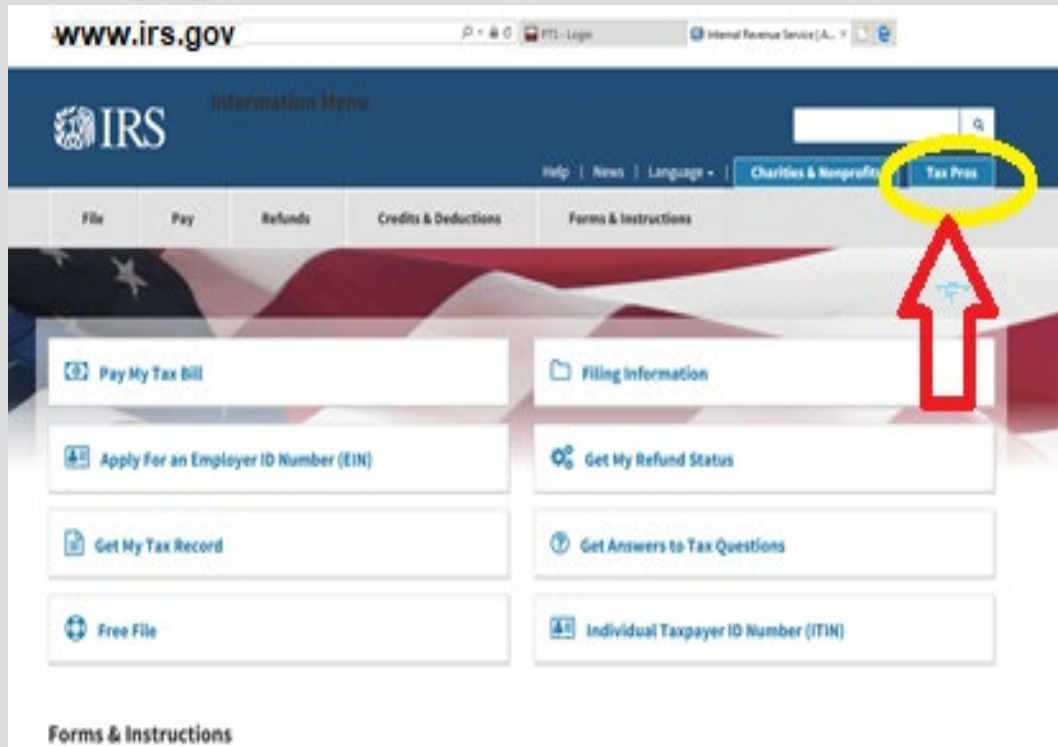
PTS TAX

PTIN RENEWAL & SUBMISSION

ACCESS PTIN RENEWAL THROUGH IRS WEBSITE

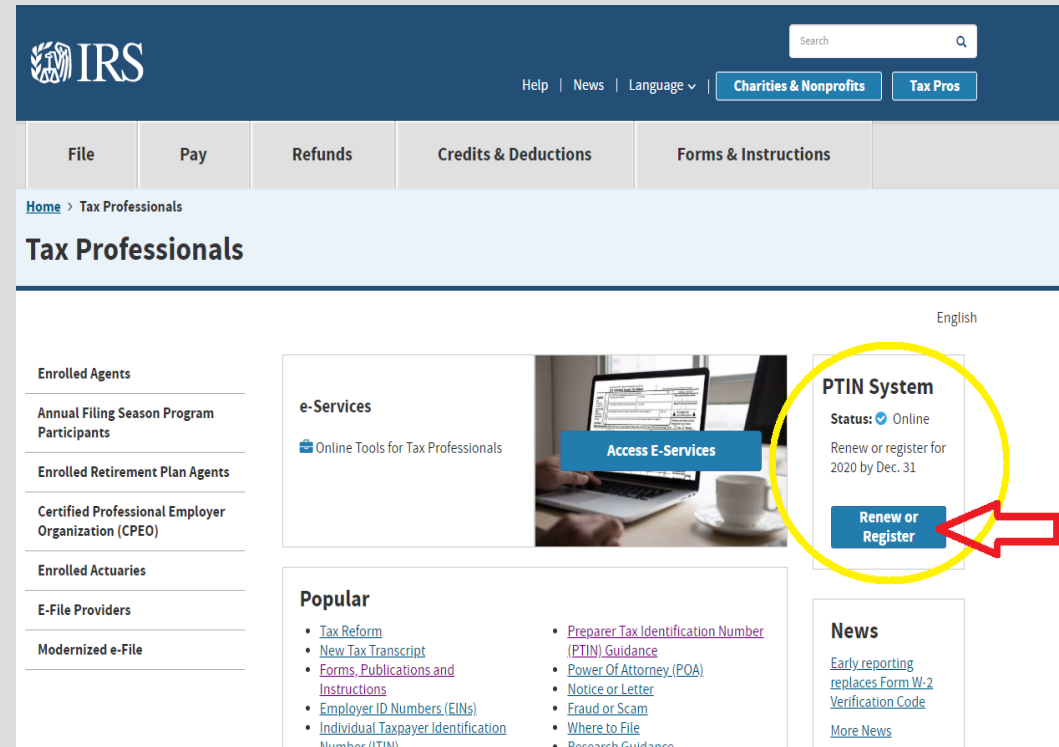
TYPE [WWW.IRS.GOV](http://www.irs.gov) IN BROWSER

- Click on Tax Pros in top right corner



UNDER PTIN SYSTEM

- Click on Register or Renew



ACCESSING PTIN ACCOUNT

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

- New PTIN registrants will create a PTIN account

IRS

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.

Returning User

User ID:
Username

Password:
Password

[Sign In](#)

[Forgot password?](#)
[Forgot user ID?](#)
[Forgot or cannot access email?](#)

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.

[Create Account](#)

Frequently Asked Questions

- [How do I access my online account?](#)
- [How do I renew my PTIN?](#)
- [How do I sign up for a new PTIN?](#)
- [I signed up for a new PTIN but how do I know my PTIN status?](#)
- [Do I need a PTIN?](#)
- [How do I submit a name change request?](#)
- [What is the Annual Filing Season Program?](#)

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- [What is the Annual Filing Season Program?](#)

- If you do not remember password, Complete FORGOT Password steps

PTIN ACCOUNT MAIN MENU

- 2020 Renewal Option
- Click on SELECT Button

The screenshot displays the IRS PTIN Account Main Menu. At the top left is the IRS logo. On the right, it shows the user is logged in as 'DOE, JANE' with links for 'Edit Login Information' and 'Logoff'. Below this is the 'Main Menu' section with the instruction 'Choose from the options below for the function you wish to perform.' Underneath, there is a section titled 'Manage My PTIN Account' with a dropdown menu. The dropdown menu is open, showing the '2020 Renewal' option highlighted with a yellow circle. A red arrow points to the 'Select' button next to the '2020 Renewal' option. To the right of the dropdown menu is a 'My PTIN Information' box with a 'Show Details' button. The PTIN number is #P01234567 and the PTIN Status is Active.

- **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 - Felony Information

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 disqualify you from obtaining a PTIN. However, generally, a person who is currently incarcerated for any felony conviction will not be permitted to obtain or renew a PTIN.

Use the space below to provide details of any felony conviction(s). Providing false or misleading information on this application is a criminal offense that may result in prosecution and criminal penalties. All facts and circumstances will be considered. You will be contacted if additional information is needed.

Fields marked with "*" are required.

Have you been convicted of a felony in the last 10 years? Yes No

Felony Explanation:

- 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 false or misleading information on this application is a criminal offense that could result in prosecution and criminal penalties. All facts and circumstances will be considered. You will be contacted if additional information is needed. If you have never filed a U.S. individual income tax return because you are not required to do so, select "Yes" below.

Fields marked with "*" are required.

Are you current with your federal individual and business taxes including any corporate and employment tax obligations? Yes No

If no, please provide an explanation:

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
Personal Information	Full Name: Jane Doe <input type="button" value="Edit"/> Social Security Number: ***** Birthdate: 1/1/1974
Contact Information	Personal Mailing Address: 24 ARBOR LANE Calhoun, GA 30701 US <input type="button" value="Edit"/> Phone Number: 706-602-0597 Email: sherim@ptstax.com Business Address: 113 N Park Avenue Calhoun, GA 30701 US
Business Information	Business Name: <input type="button" value="Edit"/> Business 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 Application

Review and agree to the statement below before submitting.

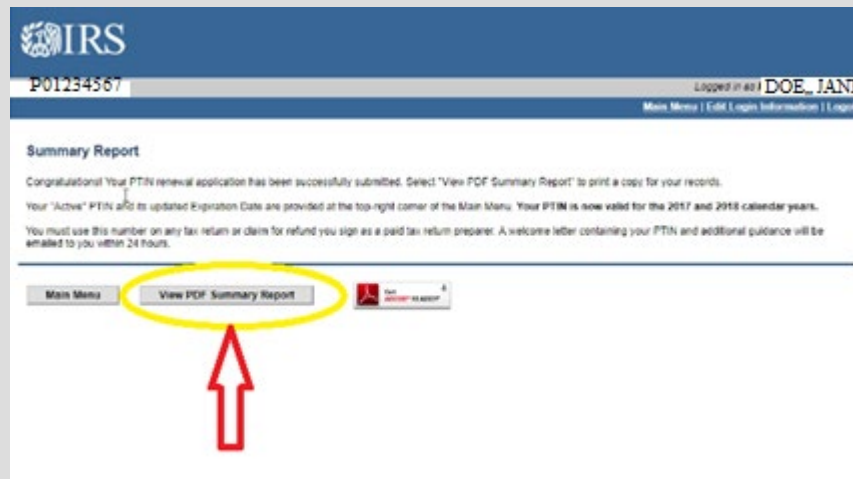
Under penalty of perjury, I declare that I have examined this application and read all accompanying information and, to my best knowledge and belief, the information provided is true, correct and complete. I understand any false or misleading information may result in criminal penalties and/or the denial or termination of a PTIN.

Yes - I have read and agree to the statement above.
 No - I do not agree to the statement above.

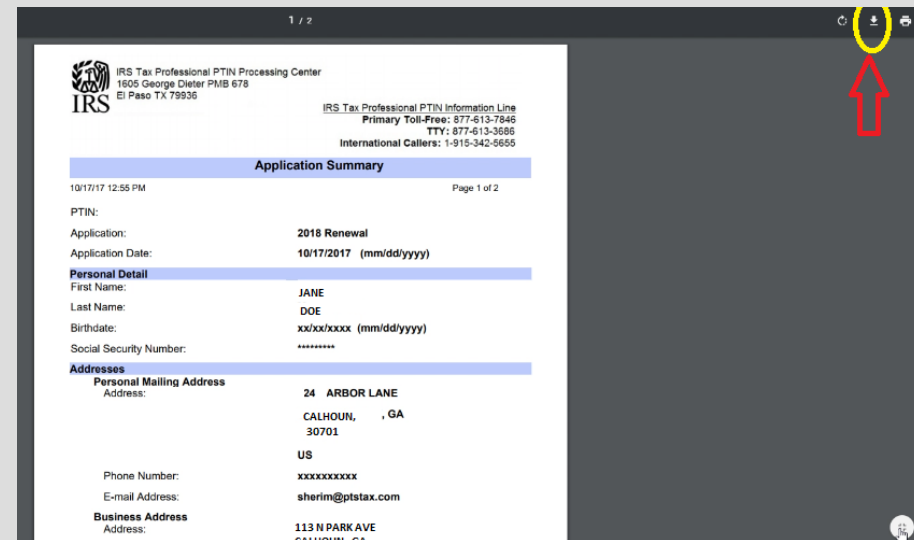


VIEW SUMMARY REPORT

- Click **VIEW SUMMARY REPORT**

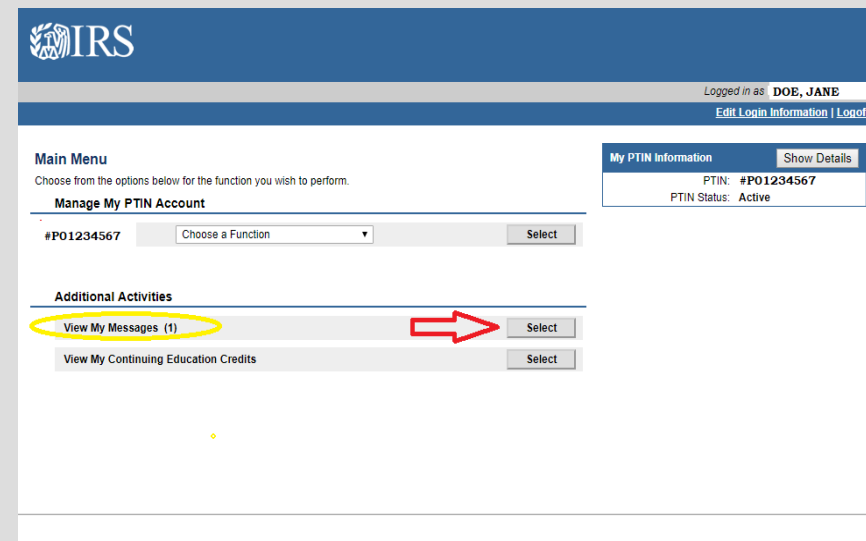


- Select **DOWNLOAD** option in top right corner



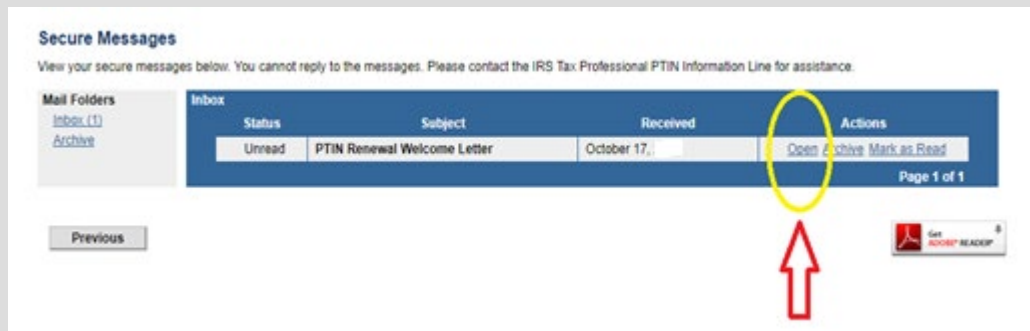
PTIN WELCOME LETTER

- Email notification will arrive within 24 – 48 hours of PTIN renewal/registration
- Login PTIN account
- Click **SELECT** beside **VIEW MESSAGES** on main menu

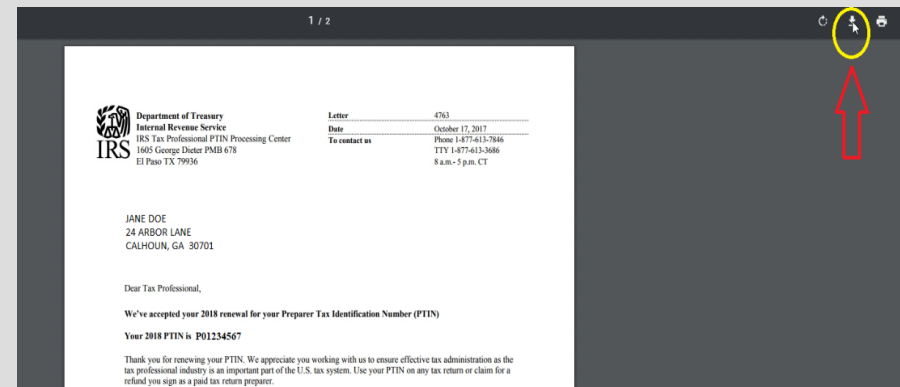


DOWNLOAD PTIN WELCOME LETTER

- Click OPEN to view pdf letter



- Click DOWNLOAD in top right corner



- File will be saved in Download file on PC

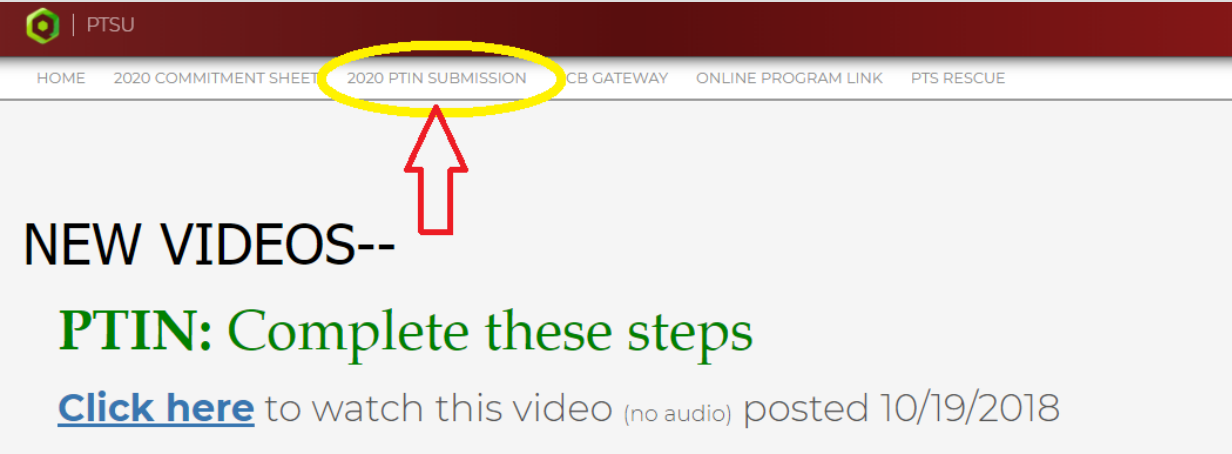
- NOTE: consider renaming file using following format; Name EFIN 2020 PTIN (our example would label record: Jane Doe 876543 2020 PTIN)

SUBMIT PTIN TO PTS

PTIN information **MUST BE RECEIVED** to allow access to
2019 Tax Program

VISIT PTS UNIVERSITY SITE

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



The screenshot shows the website's navigation bar with the following items: HOME, 2020 COMMITMENT SHEET, 2020 PTIN SUBMISSION, CB GATEWAY, ONLINE PROGRAM LINK, and PTS RESCUE. The '2020 PTIN SUBMISSION' link is circled in yellow, and a red arrow points to it from below. Below the navigation bar, the text 'NEW VIDEOS--' is displayed, followed by a green link 'PTIN: Complete these steps' and a blue link 'Click here' with the text 'to watch this video (no audio) posted 10/19/2018'.

PTSU

HOME 2020 COMMITMENT SHEET 2020 PTIN SUBMISSION CB GATEWAY ONLINE PROGRAM LINK PTS RESCUE

NEW VIDEOS--

PTIN: Complete these steps

[Click here](#) to watch this video (no audio) posted 10/19/2018

PROVIDE DATA



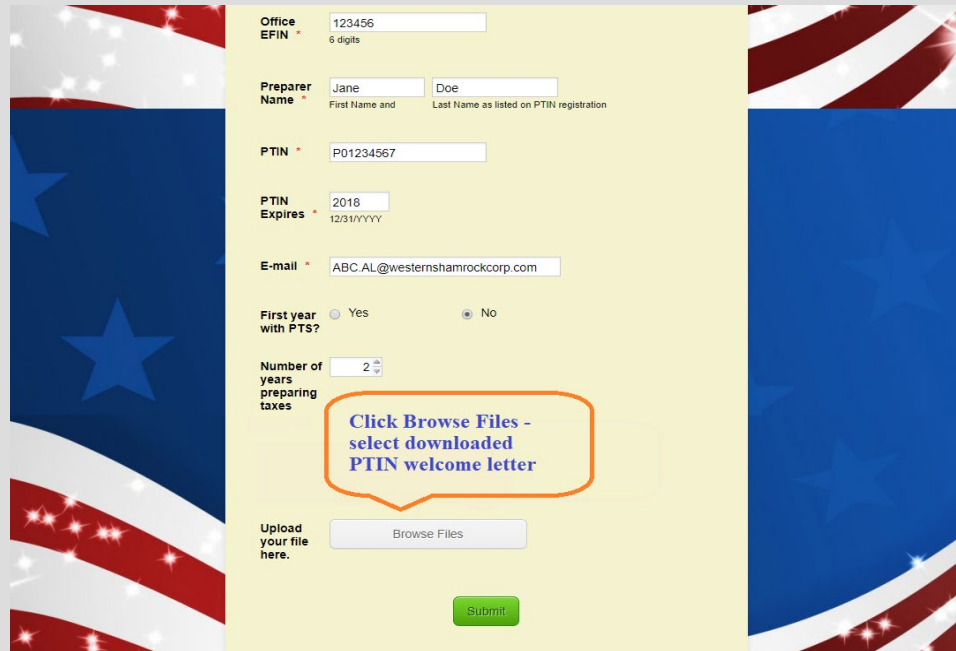
All fields are necessary to assure login credentials in 2019 tax program allow access to correct location.



List office email address to assure receipt of login credentials.

UPLOAD PTIN WELCOME LETTER

- Click **BROWSE FILES** to attach PTIN welcome letter

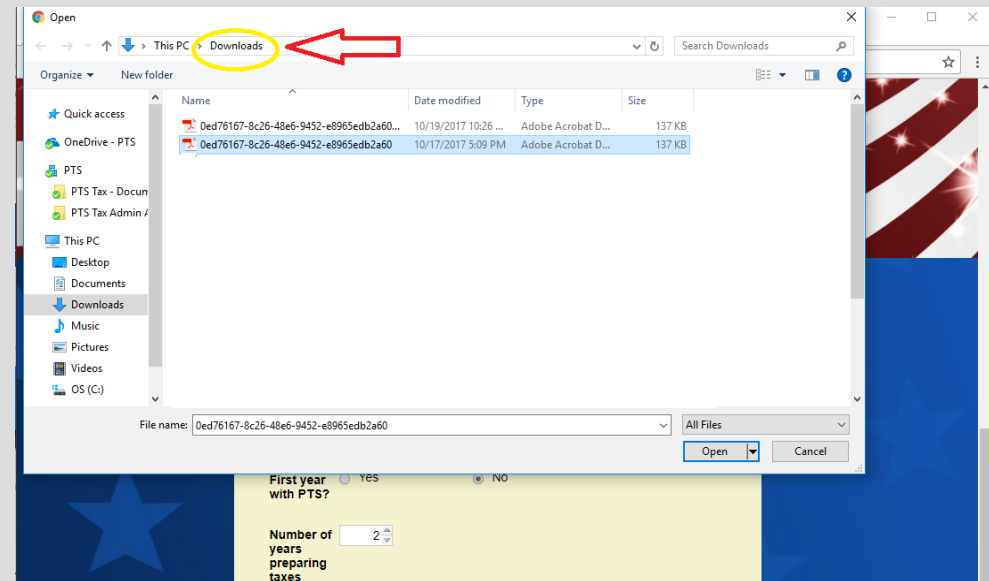


The screenshot shows a registration form with the following fields:

- Office EFIN: 123456 (6 digits)
- Preparer Name: Jane Doe (First Name and Last Name as listed on PTIN registration)
- PTIN: P01234567
- PTIN Expires: 2018 (12/31/YYYY)
- E-mail: ABC.AL@westernshamrockcorp.com
- First year with PTS?: Yes No
- Number of years preparing taxes: 2

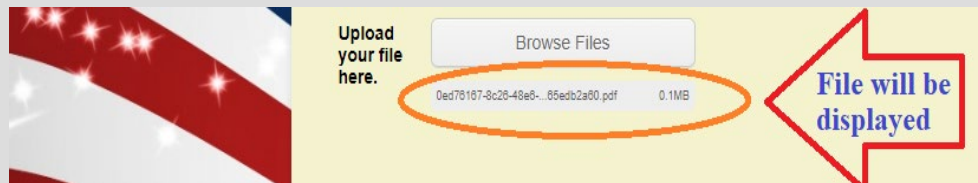
A callout box with an orange border contains the text: "Click Browse Files - select downloaded PTIN welcome letter". Below the callout is a "Browse Files" button. At the bottom right is a "Submit" button.

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

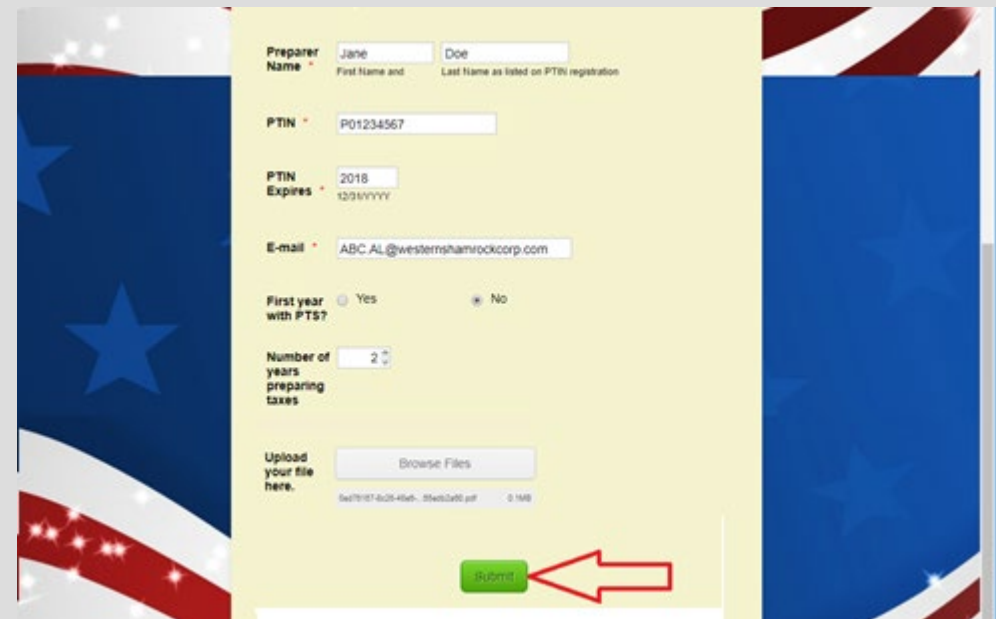


VERIFY INFORMATION PROVIDED

- Assure appropriate file has been attached



- 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
12/31/YYYY

E-mail * ABC.AL@westernshamrockcorp.com

First year with PTS? Yes No

Number of years preparing taxes 2

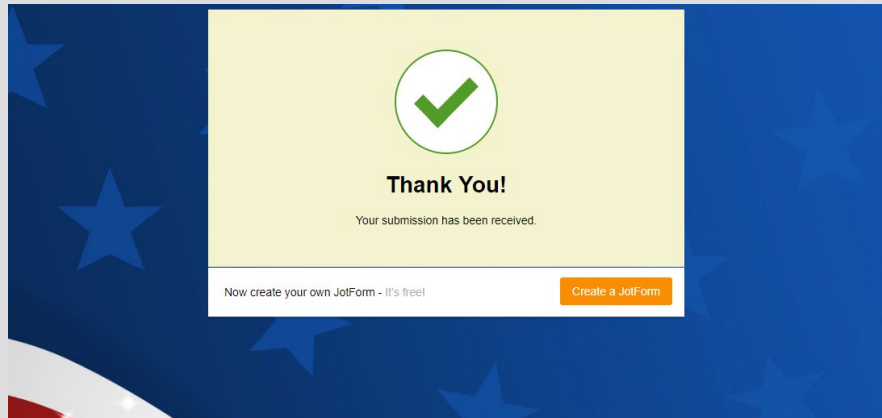
Upload your file here. Browse Files
0ed78167-8c26-48e8-...05edb2a00.pdf 0.1MB

Submit

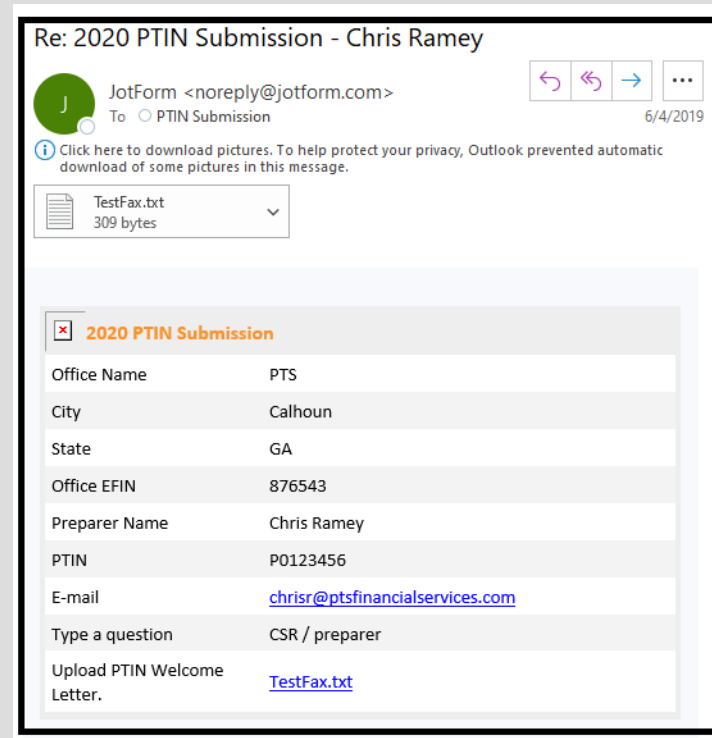
- Confirm valid office email is listed
- Once verification is complete, click **SUBMIT**

SUBMISSION CONFIRMATION

- Notice of submission of records



- Email notification



CONGRATULATIONS!

You have completed the PTIN renewal and submission process!