

# PTS TAX

PTIN RENEWAL & SUBMISSION

# ACCESS PTIN RENEWAL THROUGH IRS WEBSITE

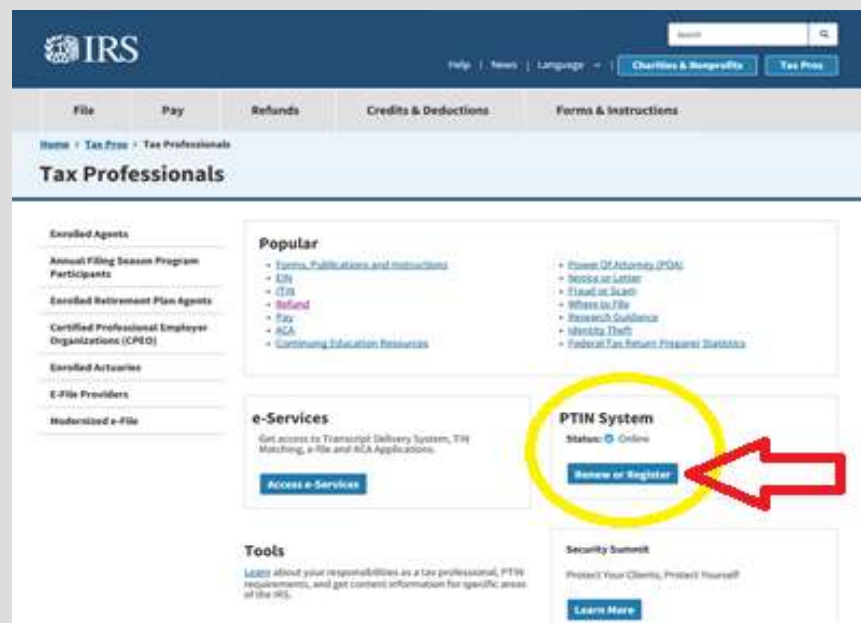
TYPE [WWW.IRS.GOV](http://www.irs.gov) IN BROWSER

- 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



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

## PTIN ACCOUNT MAIN MENU

- 2018 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 'Logout'. The main content area is titled 'Main Menu' and includes the instruction 'Choose from the options below for the function you wish to perform.' Below this is a section for 'Manage My PTIN Account' with a text input field containing '#P01234567'. A yellow circle highlights the '2018 Renewal' option, and a red arrow points to the 'Select' button next to it. To the right, a 'My PTIN Information' box shows 'PTIN: #P01234567' and 'PTIN Status: Active' with a 'Show Details' link.

# ANSWER SUITABILITY QUESTIONS

- Felony Conviction

**2018 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

**2018 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

**2018 Renewal - Review Your Information**  
Carefully review your information below. If it is correct, select "Next".

<b>Application</b>	Application Date: 10/17/2017	
<b>Personal Information</b>	Full Name: Jane Doe Social Security Number: ***** Birthdate: 1/1/1974	<input type="button" value="Edit"/>
<b>Contact Information</b>	Personal Mailing Address: 24 ARBOR LANE Calhoun, GA 30701 US Phone Number: 706-602-0597 Email: sherim@ptstax.com Business Address: 113 N Park Avenue Calhoun, GA 30701 US	<input type="button" value="Edit"/>
<b>Business Information</b>	Business Name: 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.	<input type="button" value="Edit"/> <input checked="" type="checkbox"/> Yes

# SIGN YOUR APPLICATION

- Click YES to electronically sign application
- Click SUBMIT


**2018 Renewal - Sign Your Application**

Review and agree to the statement below before submitting.

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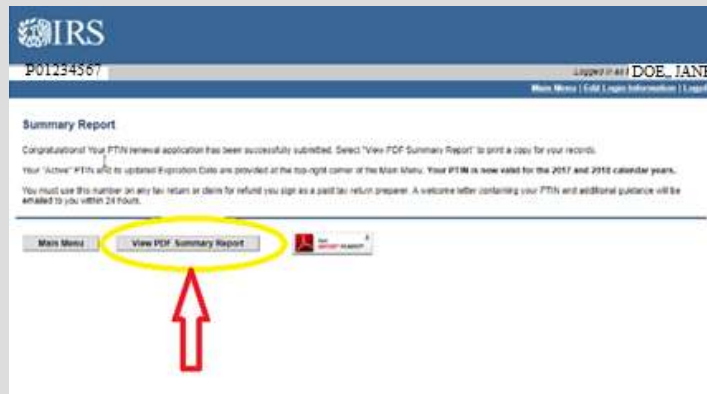
Under penalty of perjury, I declare that I have examined this application and read all accompanying information and, to my best knowledge and belief, the information provided is true, correct and complete. I understand any false or misleading information may result in criminal penalties and/or the denial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

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

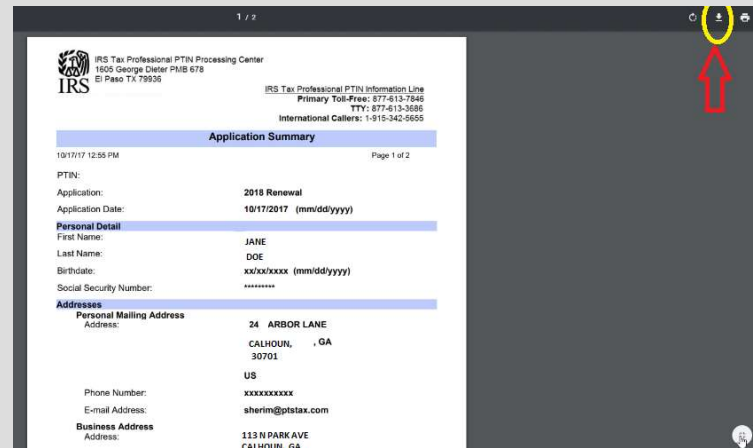


# VIEW SUMMARY REPORT

- Click VIEW SUMMARY REPORT

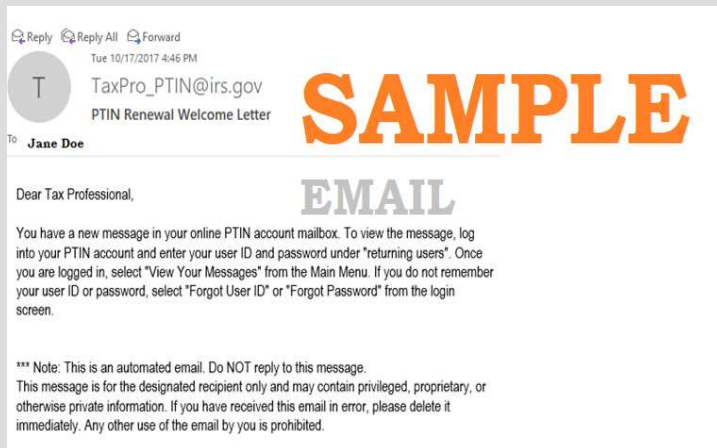


- Select DOWNLOAD option in top right corner

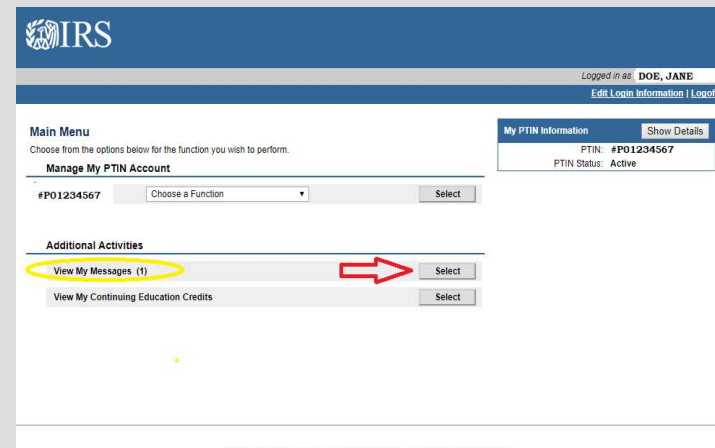


# PTIN WELCOME LETTER

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

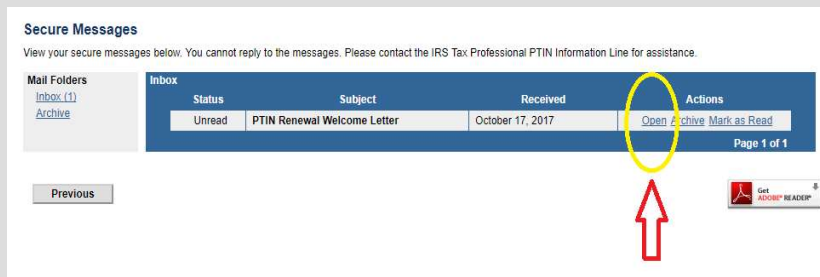


- Login PTIN account
- Click **SELECT** beside **VIEW MESSAGES** on main menu

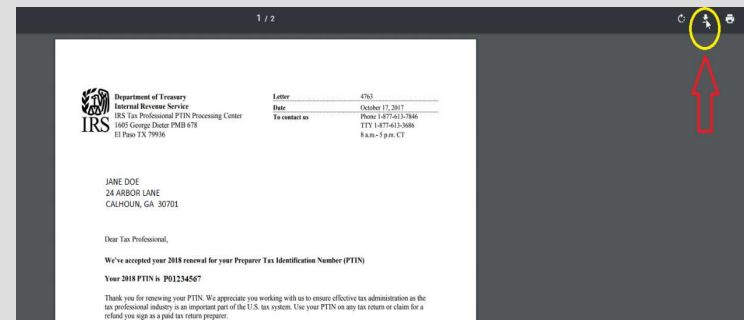


# DOWNLOAD PTIN WELCOME LETTER

- Click OPEN to view pdf letter



- Click DOWNLOAD in top right corner



- File will be saved in Download file on PC

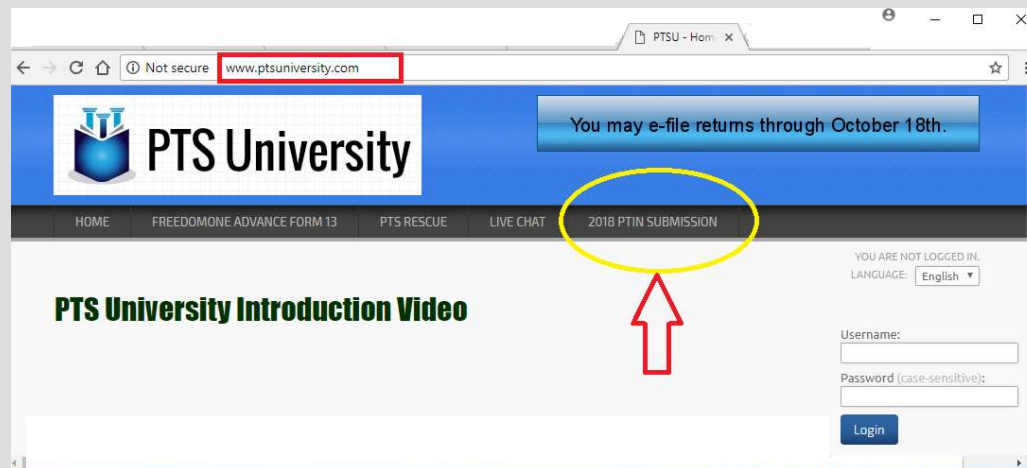
- NOTE: consider renaming file using following format; Name EFIN 2018 PTIN (our example would label record: Jane Doe 876543 2018 PTIN)

# SUBMIT PTIN TO PTS

PTIN information **MUST BE RECEIVED** to allow access to  
2017 Tax Program

## VISIT PTS UNIVERSITY SITE

- [www.ptsuniversity.com](http://www.ptsuniversity.com)
- Select 2018 PTIN Submission from menu bar



## PROVIDE DATA

All fields are necessary to assure login credentials in 2017 tax program allow access to correct location.

List office email address to assure receipt of login credentials.

JotForm X PTSU - Home X

Secure | <https://form.jotform.com/72776434859170>

**PTSTAX**  
PERSONAL TAX SERVICES

English (US)

### 2018 PTIN Submission

Enter the PTIN registration information from your IRS letter.

Company   
(ex. ABC-XYZ Finance Company)

District Manager   
or Supervisor Name

Office Name \*   
(ex. ABC Tax Shoppe #32)


City \*

State \*   
(ex. AL, GA, TX, etc.)

Enter company field

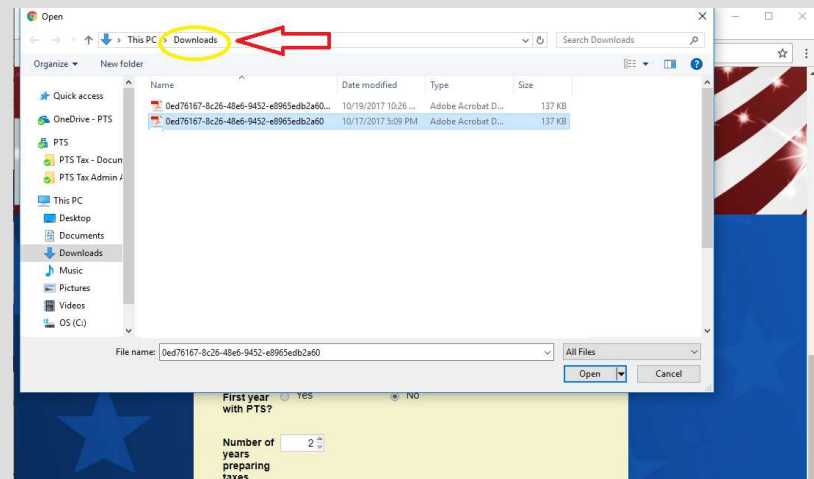
# UPLOAD PTIN WELCOME LETTER

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



The screenshot shows a web form for PTIN registration. The form includes fields for Office EFIN (123456), Preparer Name (Jane Doe), PTIN (P01234567), PTIN Expires (2018), E-mail (ABC.AL@westernshamrockcorp.com), and First year with PTS? (No). A callout box with a blue border and white background 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  
03/1/YY

E-mail \* ABC.AI@westernhamrockcorp.com

First year with PTS?  Yes  No

Number of years preparing taxes 2

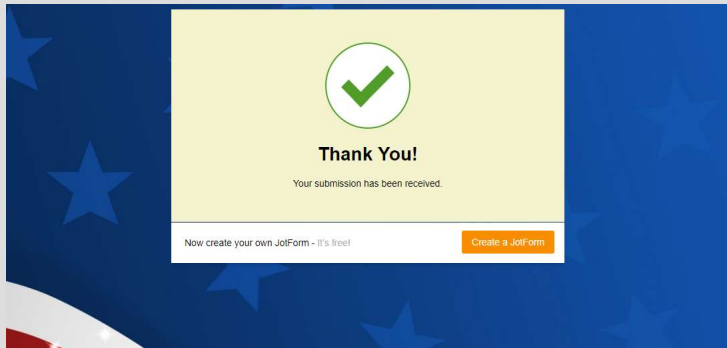
Upload your file here.   
0ed78187-8c28-48e8-...55edb2a90.pdf 0.1MB

Submit

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

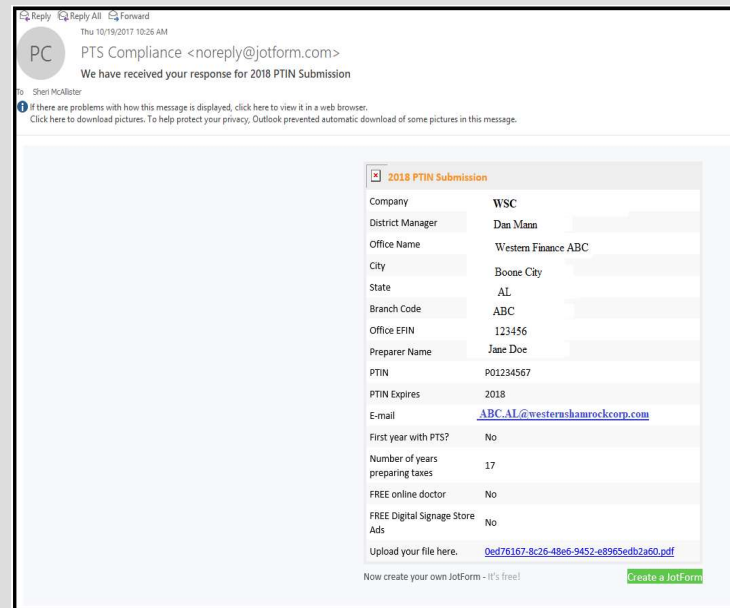
# SUBMISSION CONFIRMATION

- Notice of submission of records



- Forward email notification to Supervisor

- Email notification



**CONGRATULATIONS!**

You have completed the PTIN renewal and submission process!