

Page 2 – Main Menu for non-credentialed, active PTIN holders who have obtained enough CE for Annual Filing Season Program eligibility (*New* ability to renew PTIN and elect AFSP participation during one log-in)

Page 3 – Instructions to complete your PTIN renewal first if Circular 230 consent is chosen before PTIN has been renewed

Pages 4 – Annual Filing Season Program Circular 230 consent for non-credentialed PTIN holders

Pages 5-6 – Annual Filing Season Program election to consent for credentialed PTIN holders

Page 7 – Main Menu for new PTIN applicants

Pages 8-12 – *New* online PTIN application process for people with an SSN who haven't filed a U.S. federal tax return in the past 4 years (previously would have required a paper Form W-12). Note: *New* online PTIN application process for people **without** an SSN works similarly.

Pages 13-14 – *New* online prior year renewal process (previously would have required a paper Form W-12)

Pages 15-18 – *New* online Name Change process

Page 19 – Returns Filed Per PTIN

Page 20 – View My Continuing Education Credits

Page 21 – Update My PTIN Account (to update contact info, business info, credentials, and 1040 question)



Main Menu

Choose from the options below for the function you wish to perform.

Renew My PTIN

P#####	2017 Renewal	Select
--------	--------------	--------

Additional Steps

P#####	AFSP Record of Completion - Circular 230 Consent	Select
--------	--	--------

Manage My PTIN Account

P#####	Choose a Function Inactivate PTIN Reactivate PTIN for 2016 Reactivate PTIN for 2017 Opt Out of Preparer Directory Submit a Name Change Request Update My PTIN Account Information Upload a Document	Select
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Additional Activities

View Next Steps	Select
Make Payment	Select
View My Messages (2)	Select
View Returns Filed Per PTIN	Select
View My Continuing Education Credits	Select

PTIN Information

[Hide Details](#)

PTIN: **P#####**
PTIN Status: **Active**
PTIN Expiration: **12/31/2016**
File Number: **#####**
Professional Credential:



PTIN #PXXXXXXXX

Logged in as **Doe, John**

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Gather Your Information

Complete Your Renewal

AFSP Record of Completion - Circular 230 Consent - Complete Your Renewal

You have completed the required amount of continuing education for the 2017 Annual Filing Season Program.

However, in order to participate, you must renew your PTIN for 2017 before you can complete this step to sign the consent to subpart B and section 10.51 of Treasury Department Circular No. 230.

Return to the Main Menu to renew your PTIN. After you complete your PTIN renewal, return to this screen to continue your election to participate in the Annual Filing Season Program.

Press "Cancel" to cancel Application.

Previous

Cancel



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Gather Your Information

AFSP Record of Completion - Circular 230 Consent - Consent Form

Consent Form

Review Your Information

Provide Your Consent

In order to receive a 2017 Annual Filing Season Program - Record of Completion, I agree to abide by the duties and restrictions relating to practice before the IRS in [subpart B and section 10.51 of Treasury Department Circular No. 230](#) for the entire period covered by the Record of Completion.

I understand that failing to comply with the duties and restrictions relating to practice before the IRS in these sections may result in the revocation of my Annual Filing Season Program - Record of Completion, and I may be prohibited from participating in the Annual Filing Season Program in the future.

* Do you consent to the statement above? Yes No

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[Cancel](#)



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Overview

Consent Form

Review Your Information

AFSP Record of Completion - Elect to Participate - Gather Your Information

You have met the continuing education requirements of the 2017 Annual Filing Season Program. The Annual Filing Season Program was created to recognize the efforts of non-credentialed return preparers who voluntarily obtain continuing education credits and meet certain other requirements.

Our records indicate you are an authorized Department of Treasury Circular 230 practitioner. As an attorney, certified public accountant, enrolled agent, enrolled retirement plan agent, or enrolled actuary subject to all Circular 230 rights and responsibilities, an Annual Filing Season Program Record of Completion serves no additional purpose. However, if you want to participate and obtain a 2017 Annual Filing Season Program Record of Completion, select Next.

Next

Cancel



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Overview

AFSP Record of Completion - Elect to Participate - Consent Form

Consent Form

Review Your Information

Confirm Your Election to Participate

Fields marked with "" are required.*

* I elect to participate in the 2017 Annual Filing Season Program and obtain a Record of Completion.

Yes No

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Cancel



Main Menu

Choose from the options below for the function you wish to perform.

Apply for a PTIN

Select the option for the year when you will first prepare tax returns. If you select 2016, you will be required to pay again to renew your PTIN for the 2017 calendar year. Select "Without SSN" only if you do not have a Social Security Number and you reside outside of the United States.

PTIN Information

No PTIN Information Available

2017 PTIN Sign-up (With SSN)

2017 PTIN Sign-up (Without SSN)

2016 PTIN Sign-up (With SSN)

2016 PTIN Sign-up (Without SSN)

PTIN Sign-up (With SSN - No Recent Tax Return)



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Gather Your Information

- Verify Status
- Year of Application
- Personal Information
- Contact Information
- Business Information
- Professional Credentials
- 1040 Filer
- Felony Information
- Tax Compliance
- Supporting Information
- Review Your Information

PTIN Sign-up (With SSN - No Recent Tax Return) - Gather Your Information

You have initiated a new PTIN application option that is for one or more of the following criteria only:

- You have never filed a U.S. Individual Income Tax Return
- You have not filed a U.S. Individual Income Tax Return within the past four years
- You file your tax returns with the Departamento de Hacienda (Puerto Rico) instead of with the U.S. Internal Revenue Service

Before you begin this PTIN application, you will need:

- Personal information (name, mailing address, date of birth)
- Business information (name, mailing address, telephone number)
- Explanations for felony convictions (if any)*
- Explanations for problems with your U.S. federal tax obligations (if any)*
- Credit or debit card for the application fee
- If applicable, U.S. professional credential information (CPA, attorney, enrolled agent, enrolled actuary, enrolled retirement plan agent, state regulated tax preparer, certifying acceptance agent) including certification number, jurisdiction of issuance, **and expiration date**
- **Notarized or certified** copies of documents that verify your identity. You must submit a notarized or certified original copy of a social security card along with one other government-issued document that contains a current photo ID and name that are consistent with the information provided on the PTIN application.

If you wish to end at any time, select Cancel.

If you need any assistance throughout the process, call the [IRS Tax Professional PTIN Line](#).

Next **Cancel**



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- Verify Status**
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PTIN Sign-up (With SSN - No Recent Tax Return) - Verify Status

The PTIN Sign-up (With SSN - No Recent Tax Return) option is intended for applicants for whom at least one of the following criteria applies:

- You have never filed a U.S. Individual Income Tax Return
- You have not filed a U.S. Individual Income Tax Return within the past four years
- You file your tax returns with the Departamento de Hacienda (Puerto Rico) instead of with the U.S. Internal Revenue Service

If you have filed a U.S. Individual Income Tax Return within the past four years, you should select "Cancel" below and choose the "PTIN Sign-up (With SSN)" option.

Question	Answer
Have you filed a U.S. Individual Income Tax Return within the past four years? [Answer no if you file your tax returns with the Departamento de Hacienda (Puerto Rico).]	<input type="radio"/> Yes <input type="radio"/> No

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Next
Cancel



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PTIN Sign-up (With SSN - No Recent Tax Return) - Year of Application

Confirm the Year for Which You Want a PTIN

PTINs are issued for a specific calendar year, and you are applying for a 2017 PTIN, which enables you to prepare tax returns for compensation from January 1 - December 31, 2017. Select **2017** below.

Fields marked with "" are required.*

* Confirm the year for which you would

like to apply for a PTIN:

- [Previous](#)
- [Next](#)
- [Cancel](#)

The next 7 screens allow the user to enter PTIN application information as shown in the left hand menu.



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- Tax Compliance
- Supporting Information**
- Review Your Information

PTIN Sign-up (With SSN - No Recent Tax Return) - Supporting Information

Upload notarized or certified copies of documents that verify your identity. You must submit a notarized or certified copy of your social security card along with one other government-issued document that contains a current photo ID and name.

Examples of acceptable government-issued supporting documents verifying identity:

- Passport
- Civil birth certificate
- U.S. State ID card
- Military ID card
- Driver's license
- National ID card

Notarized photocopies must be notarized by a U.S. notary public. To do this, the notary must see the valid, unaltered, original documents and verify that the copies conform to the original. You must upload the copy that bears the mark (stamp, signature, etc.) of the notary.

Certified copies must have a stamp and/or an ink seal. All certifications must be included when the documents are uploaded.

Please allow 4-6 weeks for the IRS to review. Once the identity documents have been verified and approved, you will be notified to log in and finish the online PTIN application process.

Files must be less than 2 MB in size. The following document extensions are acceptable: .pdf, .doc, .docx, .rtf, .txt, .gif, .jpeg, .jpg, and .png.

Locate a file with the "Browse" button and select "Attach" or "Remove" as is required.

Fields marked with "" are required.*

<Note: This section is displayed once a file is chosen and the "Attach" button is pressed. Selecting the 'Remove' hyperlink deletes the attached file from the application>

Files Uploaded		
Social Security Card.png	Remove	Identification Document
Passport.png	Remove	Identification Document

Total Size of Attached Files in Bytes: #####

<Note: This is the end of the section referenced above>

* File Name: No file chosen

* Description:

-



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Summary Report

If a "Pay Now" option is not provided below, carefully review your list of outstanding actions and select "Fix Problems" to go back through your application to fix the errors. You may return to view this list by selecting "View Next Steps" from the Main Menu.

Fees

Application Fee: \$50.00

Total Amount Due: \$50.00

You have required outstanding actions or next steps. They are listed below.

- 1. Identity Verification Outstanding:** You have uploaded supporting identity documents. Please allow 4-6 weeks for the IRS to review. Once the identity documents have been verified and approved, you will be notified to log in and finish the online PTIN application process.
2. (deficiency)
- 3. Payment Outstanding:** You must pay your PTIN application fee.

[Fix Problems](#)

[View PDF Summary Report](#)



The user is able to proceed with the payment step in the application process once the manual identity verification process is complete.



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Gather Your Information

Return Preparation

Review Your Information

Prior Year Renewal for YYYY - Gather Your Information

Anyone who prepares or assists in preparing federal tax returns for compensation must have a valid PTIN. All enrolled agents must also have a valid PTIN in order to maintain their EA credential. If your PTIN has been expired for more than a full calendar year, you must renew for each previously expired year during which you prepared returns or were an enrolled agent.

This is the Prior Year Renewal process for YYYY. You will be prompted to attest whether or not returns were prepared during YYYY without a valid PTIN. If so, you are required to retroactively pay the renewal fee for YYYY. Select Next to proceed.

If you wish to end at any time, select Cancel.

If you need any assistance throughout the process, call the [IRS Tax Professional PTIN Line](#).

Next

Cancel



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Gather Your Information

Return Preparation

Review Your Information

Prior Year Renewal for YYYY - Return Preparation

Indicate Whether You Prepared Returns during the YYYY Calendar Year

If you prepared or assisted in the preparation of any tax returns for compensation or were an Enrolled Agent (EA) during the YYYY calendar year, you must select 'Yes' and will be prompted to pay the PTIN renewal fee for the specific calendar year.

* Did you prepare or assist in the preparation of federal tax returns for compensation or were an Enrolled Agent (EA) during YYYY? Yes No

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Cancel



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Gather Your Information

Personal Information

Name Change

Upload Files

Review Your Information

Submit a Name Change Request - Gather Your Information

All name change requests must include one of the documents listed below. A written response will be issued to your online account within 4-6 weeks. Requests received without acceptable documentation will be rejected.

We will accept the following documents for name change requests:

- Marriage certificate
- Divorce decree
- Court ordered legal name change
- Certificate of naturalization
- Certificate of citizenship
- Social Security card
- Government issued photo identification

Next

Cancel



PTIN #PXXXXXXXXX

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Gather Your Information

Submit a Name Change Request - Personal Information

Personal Information

Your current name on file is below. Press "Next" to proceed with entering requested name change information.

Name Change

Upload Files

Review Your Information

First Name: **John**

Middle Name:

Last Name: **Doe**

Suffix:

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Cancel



PTIN #PXXXXXXXXX

Logged in as Doe, John

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Gather Your Information

Personal Information

Name Change

Upload Files

Review Your Information

Submit a Name Change Request - Name Change

Enter your name change request details

Fields marked with "" are required.*

* First Name:

Middle Name:

* Last Name:

Suffix:

Previous

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Cancel



PTIN #PXXXXXXXX

Logged in as Doe, John

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Gather Your Information

Personal Information

Name Change

Upload Files

Review Your Information

Submit a Name Change Request - Upload Files

All name change requests must include one of the documents listed below. A written response will be issued to your online account within 4-6 weeks. Requests received without acceptable documentation will be rejected.

We will accept the following documents for name change requests:

- Marriage certificate
- Divorce decree
- Court ordered legal name change
- Certificate of naturalization
- Certificate of citizenship
- Social Security card
- Government issued photo identification

Upload a file below. Files must be less than 2 MB in size. The following document extensions are acceptable: .pdf, .doc, .docx, .rtf, .txt, .gif, .jpeg, .jpg, and .png.

Locate a file with the "Browse" button and select "Attach" or "Remove" as is required.

Fields marked with "" are required.*

<Note: This section is displayed once a file is chosen and the "Attach" button is pressed. Selecting the 'Remove' hyperlink deletes the attached file from the application>

Files Uploaded

Passport.png	Remove	Identification Doc
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Total Size of Attached Files in Bytes: #####

<Note: This is the end of the section referenced above>

* File Name: No file chosen

* Description:



Returns Filed Per PTIN

See the chart below for the number of tax returns with your PTIN processed by the IRS this year. The data is updated monthly and includes only Form 1040 series returns **processed** through the date specified.

If the number is **substantially higher** than the number of tax returns you've prepared and you suspect possible misuse of your PTIN, complete [Form 14157](#).

If the number is **substantially lower** than the number of tax returns you've prepared, you need to verify that you are entering your PTIN correctly on returns. The most common cause of this problem is the entry of an incorrect PTIN during tax preparation software set up.

Note: A minimum of 50 returns must be processed for data to be shown. At this time the data is only available for enrolled agents, CPAs, attorneys, and participants in the IRS Annual Filing Season Program, but will be expanded to other PTIN holders in the future.

Definitions:

- Processing Year: the current calendar year
- Tax Year: the tax year of the returns
- 1040s Processed: includes **only** 1040 series returns (1040, 1040-PR, 1040-SS, 1040A, 1040EZ, 1040EZ-T, 1040NR, and 1040NR-EZ)

51 Returns as of 10/14/2016

Processing Year	Tax Year	1040s Processed
2016	2015	49
	2014	2

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View My Continuing Education Credits

Your continuing education (CE) credits are displayed below. View your completed programs by clicking on "expand".

If your programs aren't listed or there are any discrepancies with the information listed, you will need to contact your CE provider directly. Common reasons for missing CE include:

- You may have provided an incorrect PTIN or name to the CE provider. Contact your provider to confirm they have your correct PTIN and name.
- Your provider may not yet have sent the data to the IRS. If you provided your correct PTIN and name to your provider and your completed program(s) is not displayed here, contact your provider.

***NOTE*: The information displayed below will not be updated beginning Sept. 14 for approximately one month while we transition to a new CE provider reporting system. Check back in early November for the latest information regarding your CE credits.**

Select Year: ▼

Category		Total Credits Earned			
FEDERAL TAX LAW		10			collapse
Provider Name	Program Title	Program Number**	Program Completion Date	Credits Earned	
Abc Education	Federal Tax Law	123123	10/10/2016	10	
FEDERAL TAX LAW UPDATES		6			collapse
Provider Name	Program Title	Program Number**	Program Completion Date	Credits Earned	
Abc Education	2016 AFTR Course	321321	10/10/2016	6	
ETHICS		2			expand

* Annual Federal Tax Refresher (AFTR) courses are included in the Federal Tax Updates category. Note: AFTR course credits do not qualify for enrolled agent CE requirements.

** What is a [program number](#)?

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Gather Your Information

Contact Information

Business Information

Professional Credentials

1040 Filer

Review Your Information

Update My PTIN Account Information - Gather Your Information

Name change requests must include documentation supporting the change. To submit a name change request, go to the main menu and under the 'Manage My PTIN Account' section select 'Submit a Name Change Request' from the drop down menu. Follow the online prompts to submit a name change request and upload the required supporting documents.

Press Next to proceed with address, business, and/or professional information updates to your PTIN account.

Next

Cancel