

# ATX™ Learning Portal

## Securing your PTIN


The IRS has a few broad guidelines for paid tax preparers. They must 1) use professional tax software that allows them to sign the return as a paid preparer and 2) e-file the return as an Electronic Return Originator (ERO). To be a paid preparer they must register to be assigned a Preparer Tax Identification Number (PTIN).

### Preparer Tax Identification Number (PTIN)

One of the first things that a professional tax preparer will need, a PTIN is required for anyone who is paid to prepare – or assist – in preparing federal tax returns. To apply for your PTIN online, you must:

- Create a PTIN account
- Apply for your PTIN
- Pay Your Fee
- Get Your PTIN

Most first-time PTIN applicants can obtain a PTIN online in about 15 minutes. The current fee is \$30.75 and this fee is non-refundable.

 All PTIN correspondence is delivered through secure online messaging in your PTIN account.

If you prefer to apply or renew your PTIN by paper, you can do so using Form W-12, IRS Paid Preparer Tax Identification Number (PTIN) Application. This process can take 4 – 6 weeks. For additional information review the [instructions](#) for this form.

### Create PTIN Account

To create a PTIN account:

1. Go to: <https://www.irs.gov/tax-professionals>
2. Click the **PTIN System Renew or Register** button.



3. From the IRS Tax Professional PTIN System page, click **CREATE AN ACCOUNT**.

### Online PTIN Account

PTIN applications and renewals for 2023 are now being processed.

If you have previously created an online PTIN account, select "Log In". If you do not remember your User ID or Password, you will have the option to select the Forgot Password or Forgot User ID links on the Login window.

Only select "Create an Account" if you have never previously applied for a PTIN.

LOG IN

CREATE AN ACCOUNT

4. On the Welcome to PTIN System page, select all that apply and click **Next**.

### Welcome to the PTIN system!

You only need to create an account if you prepare U.S. Federal Income Tax Returns for compensation, are an Enrolled Agent, or intend to become an Enrolled Agent. You do not need a PTIN for your own personal taxes.

Select all that apply to you:

☒ I will prepare U.S. Federal Income Tax Returns for compensation. ⓘ

☐ I am an Enrolled Agent or planning to become one.

☐ Neither of these scenarios applies to me.

< Back

Next

5. On the Create your online PTIN account page, enter your first name, last name, and email address. You will have to rekey your email address for confirmation, and then click **Create Account**.

### Create your online PTIN account

Enter your information in the fields below. You will receive emails from the IRS with general preparer-related program information and reminders of upcoming program requirements at the email address you provide. **Your User ID will be the email address you provide.**

The Internal Revenue Service will never solicit personal information from you via email.

**If you already have an online PTIN Account, do not create a second account.** Click Back to return to the Home Page and log in to your existing account. If you do not remember your User ID or Password, you will have the option to select the Forgot Password or Forgot User ID links on the Login window.

First Name\*

Last Name\*

Email\*

Confirm Email\*

< Back

Create Account

6. Once the IRS creates your PTIN account you will see a confirmation message on screen along with your name and User ID, which happens to be the same as the email you used.

### All done!

You now have an online account for the Tax Professional PTIN System with the following information:

Name

Email/User ID

7. You will receive an email that contains a temporary password and further instructions. Click **Done**.

### Next Steps

You will receive an email that contains a temporary password and further instructions.

Done

8. You are then redirected to back to the Online PTIN Account page, Click **Login**.

### Online PTIN Account

PTIN applications and renewals for 2023 are now being processed.

If you have previously created an online PTIN account, select "Log In". If you do not remember your User ID or Password, you will have the option to select the Forgot Password or Forgot User ID links on the Login window.

Only select "Create an Account" if you have never previously applied for a PTIN.

LOG IN

CREATE AN ACCOUNT

9. Enter your login credentials. This is your email address and the temporary password you received via email. Click Login.

### Enter your login credentials.

Log in

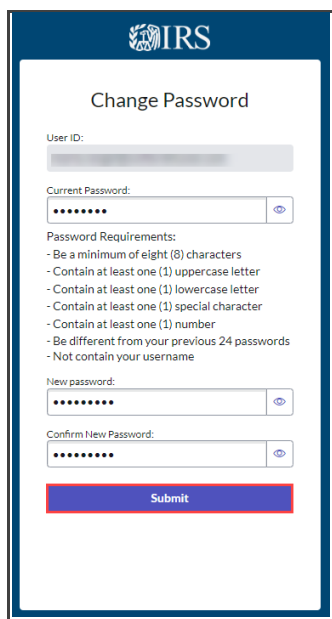
[Forgot Password ?](#)  
[Forgot User ID?](#)

Log in

On the next page you must click the "Request Code via Email" link.  
This action will send a code to the email address to complete the login process.

Back

10. You will then be prompted to change your password. Enter your current password, and then enter and rekey your new password. Click **Submit**.



The screenshot shows the IRS 'Change Password' form. At the top is the IRS logo. Below it is the title 'Change Password'. The form contains the following fields and sections:


- User ID:** A text input field with a greyed-out placeholder.
- Current Password:** A text input field with masked characters (dots) and a toggle icon for visibility.
- Password Requirements:** A list of requirements:
  - Be a minimum of eight (8) characters
  - Contain at least one (1) uppercase letter
  - Contain at least one (1) lowercase letter
  - Contain at least one (1) special character
  - Contain at least one (1) number
  - Be different from your previous 24 passwords
  - Not contain your username
- New password:** A text input field with masked characters and a toggle icon.
- Confirm New Password:** A text input field with masked characters and a toggle icon.
- Submit:** A blue button with the word 'Submit' in white text, highlighted with a red border.

## Apply for your PTIN

Once you create your online PTIN account, you can move forward with your PTIN Application.

To do so:

1. From the Online PTIN Account page, enter your email address and password, and click **Login**.
2. On the Verify your identity page, click the **Receive a code via email** link.



### Verify your identity


Click the "Receive a code via email" link below.  
A 6 digit code will be sent to your email on file.  
Enter that code below to complete your login.

6-digit code

[Receive a code via email](#)

**Log in**

3. Retrieve the 6-digit code you received via email, enter in the code field, and click **Log in**.



### Verify your identity

Click the "Receive a code via email" link below.  
A 6 digit code will be sent to your email on file.  
Enter that code below to complete your login.

6-digit code

[Receive a code via email](#)


**Log in**


4. Click the **Register for a PTIN** button.


Welcome, [redacted] .

What would you like to do today?

Select the 'Register for a PTIN' tile if you've never been issued a PTIN and need to register for the first time.  
Select the 'Link my Existing PTIN' tile if you have been issued a PTIN and have historically maintained your account via paper.

  
Register for a PTIN

  
Link my Existing PTIN

  
Edit Account Information

5. The registration process begins with a series of questions. First you are asked to verify that you have a Social Security Number. Remember that having an SSN is one of the few requirements for registering for a PTIN. Select Yes and click Next.

**Do you have a Social Security Number?**

We need to verify your identity before a PTIN can be issued. This is an important step! Please select which of the below criteria applies to you.

Yes

No

< Back

Next

6. The next question is asking if you have filed a federal tax return using this Social Security number. For the purpose of this lesson, select **Yes**, and click **Next**.

**Have you recently filed a U.S. Federal Income Tax Return under your Social Security Number?**

Have you filed a U.S. Federal Income Tax Return for the 2022, 2021, 2020, and/or 2019 tax years?

Note:

- If you were claimed as a dependent on someone else's tax return for all the tax years above, select "No".
- If you have been issued an ITIN, you do not qualify for a PTIN. Do not proceed with the PTIN application.

Yes

No

< Back

Next

7. Next, complete your personal information, and click **Next** .

**Let's start with the basics. Complete the information below.**

We will use your tax return information to verify your identity. Make sure to enter your name exactly as it appears on your previous year's U.S. Federal Income Tax Return.

<b>Full Name* (without punctuation)</b> <input type="text"/> Type Middle Name <input type="text"/> Range <input type="text"/> Type Suffix <input type="text"/> <b>Date of Birth* ⓘ</b> <input type="text"/>	<b>Social Security Number (SSN)*</b> <input type="text"/> <input type="text"/> <b>Phone Number*</b> +1 <input type="text"/> Ext. <input type="text"/>
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< Back Next

Commented [ED1]: Does this next button need a red box around it like others above

8. To help confirm your identity, enter your most recent tax return information. Be careful inputting this information, as a single digit error may result in failure to confirm your identity. Do not include punctuation in the address. Once you enter and verify that the information is correct, click the **Confirm my Identity** button.

**Enter your most recent tax return information.**

Be extremely careful inputting this information, as a single digit error may result in failure to confirm your identity. Do not include punctuation in the address (even if it was shown on your previous year's return).

<b>Tax Year* ⓘ</b> <input type="text" value="2022"/> <b>Filing Status*</b> <input type="text" value="Head of Household"/>	<b>Tax Address*</b> <input type="text"/> Type Address Line 2 (optional) <input type="text"/> Type Address Line 3 (optional) <input type="text"/> <input type="text" value="Georgia"/> <input type="text" value="United States"/>
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< Back Confirm my Identity

Commented [ED2]: Again, the red around the box

9. Assuming your identity verification was successful, you will be asked to enter your current mailing address. If the current address is the same as your tax return address, click the button Use my Tax Address, and then click Next.



**Your identity verification was successful. Enter your current mailing address.**

<b>Full Name</b> ⓘ	<b>Mailing Address*</b>
<input type="text"/>	<input type="text"/>
Middle Name <input type="text"/>	Type Address Line 2 (optional) <input type="text"/>
<input type="text"/>	Type Address Line 3 (optional) <input type="text"/>
Suffix <input type="text"/>	<input type="text"/> <input type="text"/>
Phone Number*	<input type="text"/> <input type="text"/>
+1 <input type="text"/> Ext. <input type="text"/>	United States <input type="text"/>

**Use my Tax Address**

**Save and Exit** **Next**

10. Next, complete the requested information about your tax preparation business and click Next.

**Tell us about your tax preparation business**

Your name, business address, business phone number, and website are available to vendors and other persons through the Freedom of Information Act.

<b>Business Information</b>	<b>Business Address*</b>
<input type="text"/>	<input type="text"/>
Type Business Website URL <input type="text"/>	Type Address Line 2 (optional) <input type="text"/>
Country Code <input type="text"/> Type Business Phone <input type="text"/> Ext. <input type="text"/>	Type Address Line 3 (optional) <input type="text"/>
Do you own or are you a partner in this business?* ⓘ	<input type="text"/> <input type="text"/>
<input type="radio"/> Yes <input type="radio"/> No	<input type="text"/> <input type="text"/>
	United States <input type="text"/>

**Use my Mailing Address**

**< Back** **Save and Exit** **Next**

11. Next question is Do you have a professional credential. This includes being an Enrolled Agent, Certified Public Accountant, Attorney, Enrolled Retirement Plan Agent, Enrolled Actuary, State Regulated Tax Return Preparer, or Certifying Acceptance Agent. Select the appropriate response and click Next.

### Do you have a professional credential?

Acceptable professional credentials include Enrolled Agent, Certified Public Accountant, Attorney, Enrolled Retirement Plan Agent, Enrolled Actuary, State Regulated Tax Return Preparer, or Certifying Acceptance Agent.

Please indicate if you have a professional credential.

Yes

No

< Back

Save and Exit

Next

12. Next answer the question: Have you been convicted of a felony in the past 10 years. If you answer Yes, you will be provided with space to provide details of any felony convictions. For the purpose of this lesson, select **NO**, and click **Next**.

### Have you been convicted of a felony in the past 10 years?

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. If "Yes" is selected, space will be provided 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.

Please indicate if you have been convicted of a felony in the past 10 years.

Yes

No

< Back

Save and Exit

Next

13. Next, answer if you are current with your federal individual and business taxes . Select your response and click Next.

**Are you current with your federal individual and business taxes?**

As a PTIN holder, you're expected to be compliant with federal tax laws and file all returns and pay all taxes timely (or make acceptable payment arrangements). 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'll be contacted if additional information is needed. If you have never filed a U.S. Federal Income Tax Return because you are not required to do so, select 'Yes' below.

Please indicate if you are current with your federal individual and business taxes including any corporate and employment tax obligations.

**Yes** No

< Back Save and Exit **Next**

Commented [ED3]: red around Yes box

14. Next you are asked to verify that you understand your data security responsibilities. Select the checkbox to confirm that you are aware and click Next.

**Understand your data security responsibilities.**

Paid tax return preparers must have a data security plan to provide data and system security protections for all taxpayer information. For additional information:

- Publication 4557, Safeguarding Taxpayer Data
- [www.irs.gov](http://www.irs.gov), Identity Theft Central
- [www.irs.gov](http://www.irs.gov), Protect Your Clients Protect Yourself

Select the box below to confirm you are aware of this responsibility. ⓘ


☒ **Yes, I am aware of this responsibility.**

< Back Save and Exit **Next**

15. Now you have the opportunity to review the data you have provided and edit responses as needed. Once you have reviewed this information, click Submit.

**Finally, review and submit your PTIN Registration.**

Please take a moment to carefully review the information you have provided. Make sure all information is correct before submitting your PTIN Registration.



Review your PTIN Registration

PTIN Registration for Bonibelle Rangel

**Registration for Calendar Year(s)**  
2023

**Mailing Address** Edit  
112 Malone Drive, Rome, Georgia, 30165, United States | +1 (706) 449-9017

**Business Information** Edit  
Mar Financial Services | Not Owner |  
112 Malone Drive, Rome, Georgia, 30165, United States

**Professional Credentials** Edit

**Felony Information** Edit  
I have NOT been convicted of a felony in the past 10 years.

**Tax Compliance Information** Edit  
I am current with my federal individual and business taxes.

**Data Security** Edit  
I am aware that paid tax return preparers must have a data security plan.

< Back
Save and Exit
Submit

16. Review and agree to the statement on screen and then click **Submit**.

**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 my PTIN.


☒ **Yes, I have read and agree to the statement above.**

Cancel
Submit

17. Displayed you will see confirmation message stating that your PTIN application has been successfully submitted.

18. The next step in the process is to Submit payment for your PTIN. Do one of the following:

- **Pay Later** – Your application will not be processed at this time.
- **Pay Now** – Directs you to the online payment system.

 In order for your application to be processed and a PTIN issued, you must pay the fee below. Your fee must be paid using the online payment system.

Once the payment is made, and the IRS processes your PTIN application, your PTIN will be issued.