

TaxWise® Desktop Learning Portal

Tax & Accounting

Renewing 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).

A PTIN holder must renew their PTIN every year. The IRS normally opens PTIN Renewals mid to late October.

Remember that an active PTIN is required for anyone who is paid to prepare – or assist – in preparing federal tax returns. If you are new to tax preparation, follow the appropriate steps for obtaining your PTIN. For additional information on this process, review the corresponding video that is part of the Learning Portal.

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

i If you prefer to renew your PTIN by paper, you can do so using Form W-12, IRS Paid Preparer Tax Identification Number (PTIN) Application. Keep in mind that if you choose to renew via mail, it can take up to 4 – 6 weeks.

To renew your PTIN online,

1. Go to: www.IRS.gov and from the top of the screen, click **Tax Pros**.
2. Under the PTIN System section, click the **Renew or Register** button.

The screenshot shows the IRS Tax Professionals portal. At the top, there is a navigation bar with links for File, Pay, Refunds, Credits & Deductions, and Forms & Instructions, along with a search bar. Below the navigation bar, the page title is "Tax Professionals" and there are language options: English, Español, 中文(简体), 中文(繁體), 한국어, Русский, Tiếng Việt, and Kreyòl Ayisyen. On the left side, there is a sidebar with links for Enrolled Agents, Annual Filing Season Program Participants, Enrolled Retirement Plan Agents, Certified Professional Employer Organization (CPEO), Enrolled Actuaries, E-File Providers, and Modernized e-File. The main content area features three cards: "E-Services" with the text "Online tools for tax professionals" and a button "Access e-Services"; "Tax Pro Account" with the text "Submit POA and TIA, view all your CAF authorizations and withdraw online" and a button "Use Tax Pro Account"; and "PTIN System" with the text "Renew or register for 2024" and a button "Renew or Register".

3. From the Online PTIN Account page, click **Login**.

Online PTIN Account

PTIN applications and renewals for 2024 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.

Part of the application process relies on 3rd party cookies being enabled, so it is recommended that you do not use an incognito or private browser. This will provide you with the best experience when using your online PTIN account.

LOG IN

CREATE AN ACCOUNT

4. Enter your log in credentials which consist of your email address and password and then click **Login**.

Enter your login credentials.

Log in

..... @gmail.com

.....

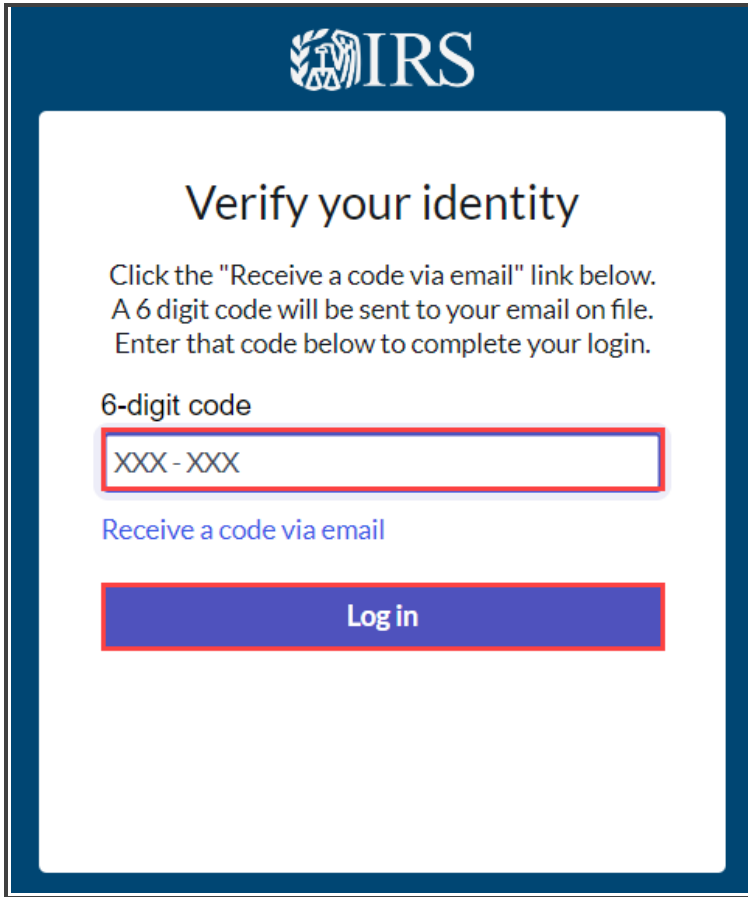
[Forgot Password ?](#)
[Forgot User ID?](#)

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.

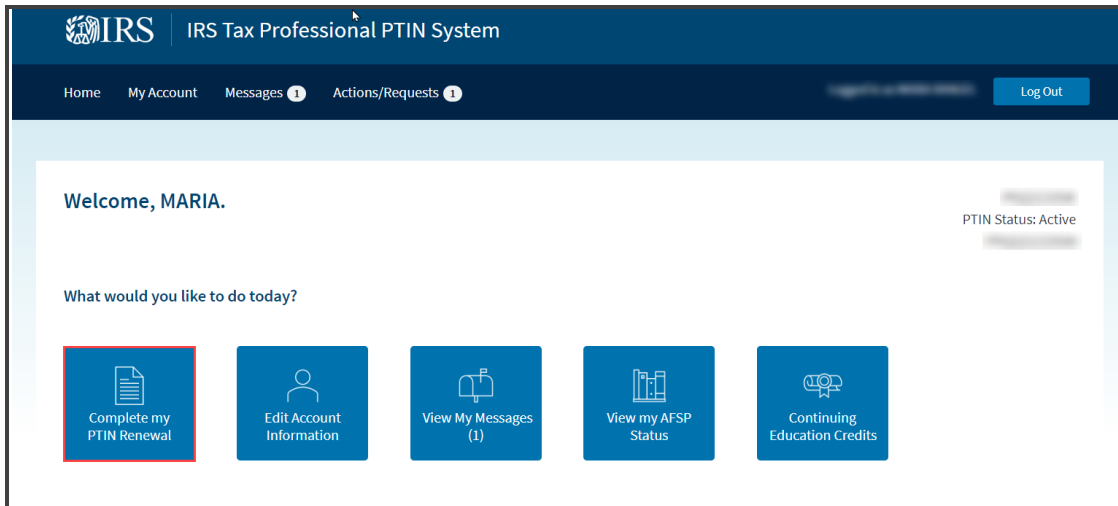
[Back](#)

5. On the Verify your Identity page, click the link **Receive a code via email**.
6. The 6-digit code will be sent to the email address on file. Enter the code in the corresponding field and then click **Login**.



7. On the welcome page, you have several options, these include:
 - Complete my PTIN Renewal
 - Edit Account Information
 - View My Messages
 - View my AFSP Status
 - Continuing Education Credits

8. For the purpose of this lesson, select **Complete my PTIN Renewal**.



- Review and update your business information. This includes business name, address, and business numbers such as EIN, CAF Number, and EFIN. When done, click **Next**.

Do you need to update your tax preparation business or employer information?

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

<p>Business Information</p> <p>MAR Financial Services</p> <p>Type Business Website URL</p> <p>Country ... <input type="text"/> Ext.</p> <p>Do you own or are you a partner in this business?* <input type="radio"/> Yes <input type="radio"/> No</p> <p>Business Numbers</p> <p>Type Employer Identification Number (EIN)</p> <p>Type Centralized Authorization File (CAF) Number</p> <p>Type Electronic Filing Identification Number (EFIN)</p>	<p>Business Address*</p> <p><input type="text"/></p> <p>Type Address Line 2 (optional)</p> <p>Type Address Line 3 (optional)</p> <p><input type="text"/> Georgia</p> <p><input type="text"/> United States</p> <p style="text-align: center; border: 1px solid blue; padding: 5px;">Use my Mailing Address</p>
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- Next indicate if you have a professional credential. These include:

- Enrolled Agent
- Certified Public Accountant
- Enrolled Retirement Plan Agent
- Enrolled Actuary
- State Regulated Tax Return Preparer
- Certified Acceptance Agent.

- For the purpose of this lesson, I select No and then 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. For the next question, indicate if you have been convicted of a felony in the past 10 years. For the purpose of this lesson, click **No**, and then click **Next** to continue.

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, please indicate if you are current with your federal income and business taxes including any corporate and employment tax obligations. For the purpose of this lesson, click **YES**, and then 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

14. As a paid tax return preparer, you must have a security plan to provide data and system security protection for all taxpayer information. Select the box to confirm that you are aware of these responsibilities and then click **Next** to continue.

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, Identity Theft Central
- 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. Take a moment to carefully review the information you have provided. If any changes need to be made, click **Edit** in the corresponding sections.

Review your PTIN Renewal

PTIN Renewal for MARIA ANNA RANGEL

Renewal for Calendar Year(s)
2024

Mailing Address
112 MALONE DRIVE NW, ROME, Georgia, 30165, United States | 7064499017 Edit

Business Information
MAR Financial Services | 7064499017 | Owner |
112 MALONE DRIVE NW, ROME, Georgia, 30165, United States Edit

Professional Credentials Edit

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

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

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

16. Make sure all the information is correct before submitting your PTIN Renewal. When ready, click **Submit**.

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**

17. On the Sign Your Application dialog box, review and agree to the statement provided on the screen before submitting. If you agree, click the checkbox, 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**

18. You will see a confirmation message that your PTIN application has been successfully submitted. The last step in the process is to pay renewal fee. You have the option to **Pay Later** or **Pay Now**.
19. If you chose to Pay Later, your application will not be processed at this time. Renewal Fee Must be paid before the application will be processed. For the purpose of this lesson, click **Pay Now**.

Submit payment for your PTIN.

Your PTIN application has been successfully submitted.

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. Select "Pay Now" to proceed.

If you select "Pay Later", your application will not be processed at this time. You must return to this system and pay online before your application will be processed and a PTIN issued.

PTIN Renewal Fee: \$19.75

Total Fee Due: \$19.75

Pay Later **Pay Now**

20. Review to the statement on the screen. When ready, select the Yes checkbox, and then click the **Pay Now** button.

Acknowledge Payment Requirement

Review and agree to the statement below before continuing.

PTIN FEES ARE NON-REFUNDABLE.

If your payment fails to process, your PTIN will be placed in Suspended status. You are responsible for submitting the proper payment to make your PTIN Active.

The IRS conducts reviews for the use of invalid PTINs. If you prepare returns for compensation without a valid PTIN you may be subject to monetary penalties for failure to use a valid PTIN.

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

Cancel Pay Now

21. Keep in mind that the fee to renew your PTIN may change from year to year. Click the Select Payment Method drop down menu and select your payment method.
22. For the purpose of this lesson, I selected to use my US Bank Account and completed the information.

Payment Details

You must pay the fee below in order for your application to be processed and a PTIN issued. You will enter your payment information once, and then be charged for each individual calendar year.

PTIN Renewal Fee: \$19.75
Total Fee Due: \$19.75

Payment Method ⓘ
 Select Payment Method ▾

23. When using a US bank account, you will be asked to identify this account as a personal or business account.
24. Once all the payment details have been provided, click the **Submit** button.

Enter an account number that does not exceed 17 digits

Type (required)
 Checking ▾

Category (required)
 Personal ▾

CANCEL

SUBMIT

25. Assuming that the payment process was successful, you will see a confirmation message stating that your PTIN Renewal was successful.

Congratulations! Your PTIN Renewal was successful.

All done! Your PTIN has been renewed. You may now use this PTIN to prepare federal income tax returns in the calendar year(s) listed. If you are having trouble downloading your application, please ensure that pop-ups are allowed and try again.

Name [REDACTED]
PTIN [REDACTED]
Status **Active**
Valid For Calendar Year(s) [REDACTED]
Amount Processed **\$19.75**
Confirmation Number [REDACTED]

[Return to Main Menu](#) [Download Application](#) [View my AFSP Status](#)

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.

IRS

Verify your identity

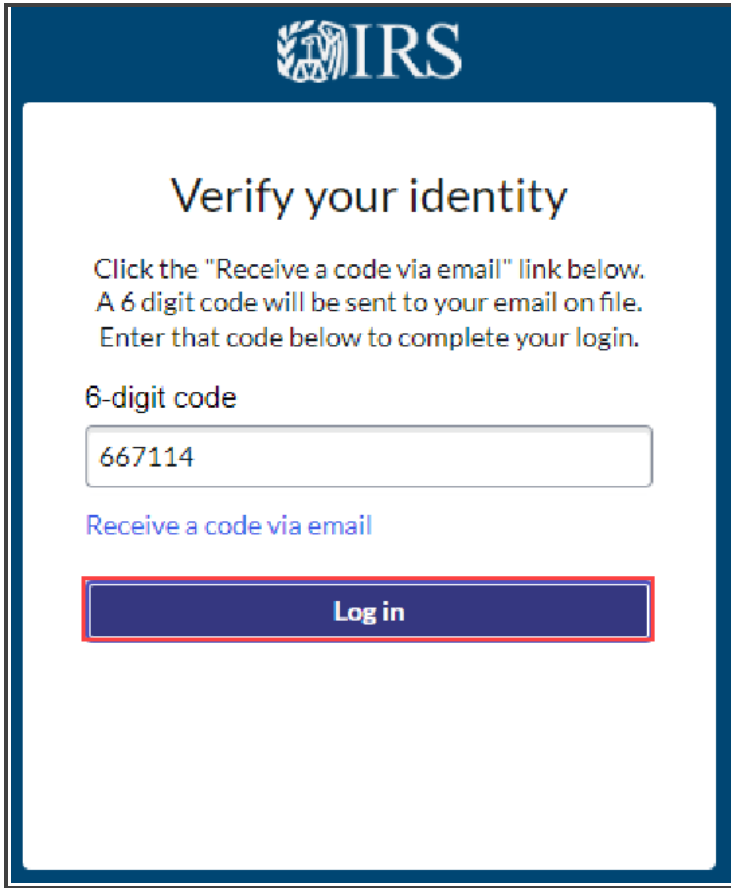
Click the "Receive a code via email" link below.
A 6 digit code will be sent to your email on file.
Enter that code below to complete your login.

6-digit code

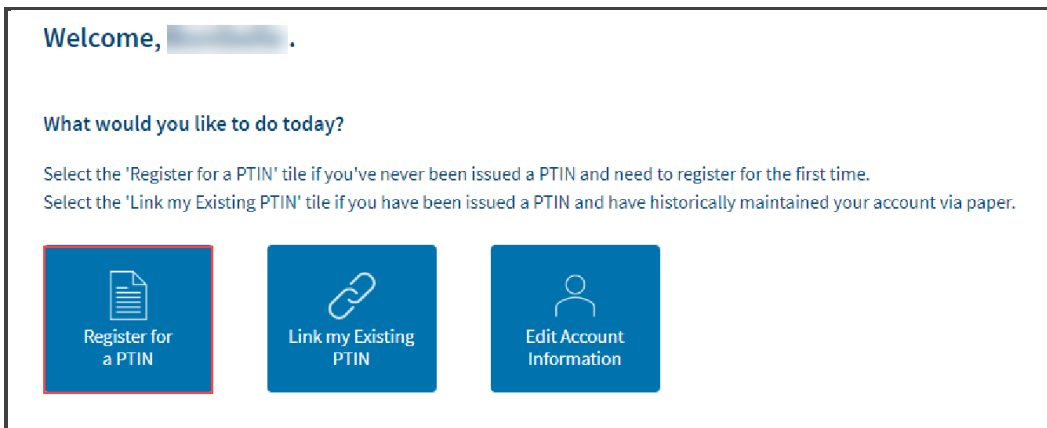
[Receive a code via email](#)

Log in

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



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



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.

Full Name* (without punctuation)

Type Middle Name

Rangel

Type Suffix

Date of Birth*

Social Security Number (SSN)*

Phone Number*

+1 Ext.

< Back

Next

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.

The screenshot shows a form titled "Enter your most recent tax return information." with a warning: "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)." The form has two columns. The left column contains "Tax Year*" (dropdown with "2022") and "Filing Status*" (dropdown with "Head of Household"). The right column contains "Tax Address*" (text input), "Type Address Line 2 (optional)" (text input), "Type Address Line 3 (optional)" (text input), a state dropdown (set to "Georgia"), and a country dropdown (set to "United States"). At the bottom left is a "< Back" button, and at the bottom right is a "Confirm my Identity" button.

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**.

The screenshot shows a form titled "Your identity verification was successful. Enter your current mailing address." The form has two columns. The left column contains "Full Name" (text input), "Middle Name" (text input), "F" (text input), "Suffix" (text input), and "Phone Number*" (dropdown with "+1", text input, and "Ext." text input). The right column contains "Mailing Address*" (text input), "Type Address Line 2 (optional)" (text input), "Type Address Line 3 (optional)" (text input), a state dropdown, and a country dropdown (set to "United States"). At the bottom center is a "Use my Tax Address" button. At the bottom right are "Save and Exit" and "Next" buttons.

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.

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

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

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, Identity Theft Central
- 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)

Mailing Address

Business Information

Professional Credentials

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

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

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

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.

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.

i 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.