



Individual Certification Checklist

Keep for office records

EMPLOYEE INFORMATION	
Employee name:	
PTIN number:	

CHECKLIST		
<input type="checkbox"/>	Renew or Obtain 2024 PTIN	PTIN instructions are located on the ATS website under Certification.
<input type="checkbox"/>	Fax 2024 PTIN letter to ATS	Fax # 678-807-5265
<input type="checkbox"/>	Complete the monthly practice problem sets for November and December	Notify DM when complete
<input type="checkbox"/>	Complete all modules	These are assigned by your home office and available in DayForce
<input type="checkbox"/>	Complete 25 Taxpayer Information sheets	Blank forms available on ATS website

Manager Name: _____

Manager Signature: _____

Branch Number: _____ Date: _____

Many training resources are available on our site including:

- Step by Step tab with "How To" Software Guides and Instructional Videos
- Tax Tips with annually updated IRS information
- Office cheat sheets, flow charts, step by step guides, and desk reference materials
- Live Chat Tax Experts to guide you through any and all questions you may have