



Individual Certification Form

All of the information needed to get certified is located on the ATS website under “Certification.”
 After you have completed below, tell your office manager to fax this form to ATS. Every
 employee preparing taxes must complete their own form.

Fax 678-807-5265

EMPLOYEE INFORMATION	
Employee name:	
PTIN number:	

CHECKLIST		
<input type="checkbox"/>	Renew or Obtain 2022 PTIN	PTIN instructions are located on the ATS website under Certification.
<input type="checkbox"/>	Fax 2022 PTIN letter to ATS	Fax # 678-807-5265
<input type="checkbox"/>	Complete monthly practice problem set	These will need to be done with a trainer.
<input type="checkbox"/>	Complete all modules	These will be assigned by your home office.
<input type="checkbox"/>	Attend Certification Webinar	Webinar schedule is on the ATS site under Certification
<input type="checkbox"/>	Complete 3 certification problems	Problems are located under Certification

Manager Name: _____

Manager Signature: _____

Branch Number: _____ Date: _____

Many training resources are available on our site including:

- Learning Center with “How To” Software Guides and Instructional Videos
- Interactive webinars covering navigating the software, refund products, and tax season updates
- 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