

How to Apply for a PTIN

(Preparer Tax Identification Number)

****We recommend completing this process in one sitting. You should get your information together prior to starting. Please set aside 10 minutes to complete this process. The IRS is a secure site that will timeout for security reasons if the screen stays open for too long without progress.****

1. Open your web browser and go to the following site. This will take you directly to the IRS PTIN system.
<https://rpr.irs.gov>
2. Select "Create an Account"
3. Select ONLY "I will prepare U.S. Federal Income Tax Returns for compensation."
4. On all screens that follow everything with an * is a required field. You will need to complete the following sections:
 - a. Name – Enter your **legal** first and last name.
 - b. User ID - You need to use your personal email address. The IRS will email you a time sensitive password needed to compete the application. **Do not use your Sun Loan email since it will block the incoming IRS email.**
 - c. Password recovery – select a secret question and type in the secret answer. d. Click Next.
5. Review your information for accuracy. If everything is correct select Submit. If you need to make changes, select Edit.
6. Once Submit has been selected, a temporary password will be issued to the email address you provided. ****You only have 24 hours to use this password or the process starts over.****
 - a. If you have your temporary password now, click Next. If the Next button does not work or times out you can go to **<https://rpr.irs.gov>** once you have your temporary password.
7. Click "Log In" to access the login screen.
8. Enter your User ID which is your email address. Enter the temporary password from the IRS email.
9. You will now need to setup a new password.
 - a. Put your temporary password from the IRS email in the Temporary Password box.
 - b. Enter and confirm your new password. Valid passwords have a minimum of 8 characters, must be different than your user ID (which is your email), must contain at least one lowercase and one uppercase letter, and it must contain at least one special character and number.

- c. Click Submit
10. From the Main Menu screen click the Select button across from option “2023 PTIN Signup (With SSN)”.
11. That will take you to the “Gather Your Information.” Select Next.
12. On the “Year of Application” screen – put 2023 in the “Confirm the Year for Which You Want a PTIN” drop-down box. Click Next.

*****The next several screens the IRS uses to verify your identity it is important that everything matches your last tax return EXACTLY. Even if there was a typo of your tax return you will still enter the information with a typo on these screens. We recommend getting a copy of your 1040 for reference.*****

13. Personal Information screen - The information you will provide **MUST** match your last filed return exactly.
 - a. Enter your first and last name as it appeared on your last filed return.
 - b. Enter your Social Security Number (no dashes)
 - c. Confirm your social security number (no dashes)
 - d. Enter your date of birth (i.e. 03/05/1988)
 - e. Click Next
14. Contact Information screen –
 - a. In the first address box “Address on U.S. Individual Income Tax Return” enter your address **EXACTLY** as it appeared on your last filed return. Do not use any punctuation and confirm that it matches exactly.
 - b. In the second address box “Personal Mailing Address” use the ATS address:

Accurate Tax Solutions
5490 McGinnis Village Place
Suite 231
Alpharetta, GA 30005

- c. Use your Sun Loan store phone number including area code for the phone number.
 - d. In the third address box “Business Address” put your Sun Loan store address. e. Click Next.
15. Identity Verification screen
 - a. Put the most recent year you filed a tax return in the drop-down box.
 - b. Select the filing status you used for the return filed in the year selected above. c. Click Next
16. Business Information screen –

- a. Answer **No** to “Are you self-employed or an owner or partner or officer of a tax preparation business?” question.
 - b. The rest of the screen will be left blank
 - c. Click Next.
17. Professional Credentials screen –
 - a. Answer **No** to the “Do you have a professional credential?” question. b. Click Next.
18. Felony Information screen –
 - a. Answer the “Have you been convicted of a felony in the last 10 years?” question.
 - b. Complete the felony explanation box if applicable.
 - c. Click Next.
19. Tax Compliance screen –
 - a. Answer the “Are you current with your federal individual and business taxes” question.
 - b. Complete the felony explanation box if you answered “No”.
 - c. Click Next.
20. Review your information carefully to ensure accuracy. **If your information is incorrect the PTIN application will be rejected, this will cause delays and additional steps.** If you need to make changes, click the Edit button for that section and make corrections as needed.
21. Once everything has been confirmed as correct click Next.
22. Sign Your Application screen –
 - a. Select “Yes – I have read and agree to the statement above.”
 - b. Click Submit.
23. You will now be on the Summary Report screen.
 - a. Click View PDF Summary Report and print for your records.
 - b. You may want to write your password on the printout. Keep your User ID (your email) and password handy since you will need it to log into your PTIN account in the future.
 - c. You can now exit out of the IRS site.

Within 24 hours you should receive an email from the IRS with your welcome letter. Once you receive that email you can log into your PTIN account.

1. Open your web browser and go to the following site: **<https://rpr.irs.gov>**
This will take you directly to the IRS PTIN system.
2. Under the **Returning User** box enter your user ID which is your email and your password. Then click Sign In.
3. Now you will be on the Main Menu screen. Under the Additional Activities heading select View My Messages (1).

4. In your Inbox you will see PTIN Welcome Letter. Under Actions click Open.
5. Congratulations! You will now be able to see your PTIN letter with your new PTIN!
 - Print it off.
 - Write your Name and your Sun Loan store number on the letter. Make sure it is legible.
 - Fax it to ATS at 678-807-5265.

Keep the letter for your records.