

# How to Get a PTIN: Definition and Checklist

Tax professionals must have a Preparer Tax Identification Number, or PTIN, if they are paid to prepare tax returns. Because PTINs expire every December 31st, tax preparers need to renew their PTIN before tax season starts. Preparers can get or renew a PTIN online in about 15 minutes or by mail in about six weeks.

## PTIN Definition

Preparer Tax Identification Numbers (PTIN) uniquely identify each tax return preparer and consist of the letter P followed by eight numbers. Every tax professional who is paid to prepare federal tax returns must obtain a PTIN from the IRS. Preparers have the same PTIN for their entire career. PTINs expire at the end of the year and must be renewed before filing tax returns in the new year. PTINs are required by law (Treasury Regulations section 1.6109-2).

## PTIN Checklist

Tax preparers can get a PTIN from the IRS for free in four steps:

**Get Your Information Ready.** Download [Form W-12](#) and gather the required documentation.

**Create an Account** on the [PTIN System](#).

**Apply for a PTIN Online.** This takes about 15 minutes.

**Receive Your PTIN Online.** In most cases, the IRS provides a PTIN immediately after you complete your PTIN application. Check your PTIN inbox for a welcome letter.

## PTIN Documentation Requirements

You will need to provide to information found on the following documents on your PTIN application:

**Form W-12:** You'll either complete and mail Form W-12 to the IRS, or simply use Form W-12 as a documentation checklist if you plan to submit your application online.

**Personal Tax Return:** You'll use this to report your filing status and address as shown on your last federal tax return on Form W-12.

**Business Tax Return:** You need to report the [Employer Identification Number](#) of any business where you are the owner, partner, or officer. The easiest place to get this is from your business tax return.

**CAF Number:** The IRS assigns CAF numbers the first-time that a tax practitioner submits a Form 2848 (Power of Attorney) or Form 8821 (Tax Information Authorization). If you don't remember your CAF number, call the IRS Practitioner Priority Service at 1-866-860-4259.

**Felony Convictions:** Detail the date of any felony convictions, and the type of crime you were convicted of. The IRS will take all facts and circumstances into account when deciding whether your felony prevents you from getting a PTIN.

**Professional Credentials:** You will need to provide the jurisdiction, credential number, and expiration dates of your professional licenses. The professional credentials you need to list on your PTIN application include:

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

**Government-Issued Identification:** Foreign nationals and conscientious objectors who don't have a US Social Security number will need to provide notarized or certified copies of their government-issued identification.

Acceptable documents include:

- Passport
- Visa Issued by US State Department
- Military ID Card
- Driver's License
- Voter's Registration Card
- Birth Certificate
- National ID Card

## Where to Submit the Required Documentation

Once you've gathered the required documentation, you can either [apply online](#) or mail in Form W-12 to the IRS to the address below:

IRS Tax Professional PTIN Processing Center  
1605 George Dieter PMB 678  
El Paso, TX 79936