

Thank you for your interest in becoming a PMI Authorized Training Partner. This checklist helps you prepare your application by outlining the information and supporting documentation you'll need before you begin. It also includes guidance to help you complete each section of the application.

To be eligible, your organization must have been in business and providing project management training for at least one year (Access, Foundational, and Professional tiers) or three years (Premier tier).

Application checklist

To complete your Authorized Training Partner Program application, we recommend gathering the following information and documentation:

Organization information

- ☐ **Organization name**
- ☐ **Organization email address**
- ☐ **Organization website address** (this is where we will direct candidates who visit our ATP Directory)
- ☐ **Tax ID number**
- ☐ **Organization phone number**
- ☐ **Credly badge email address** (where we will send your ATP badge)
- ☐ **Date of incorporation** (official registration/start date of your company)

Contact information

- ☐ **Primary, compliance, and billing contact** (This information will pre-populate from the PMI.org account used to start the application and can be updated after approval)

Documentation

- ☐ **Dun & Bradstreet Number (DUNS)** (if applicable. If you do not have one, check "I don't have a DUNS number")
- ☐ **Proof of business:** Documentation showing that your organization has been in business for at least 1 or 3 years, depending on which tier level you are applying to (such as your organization's articles of incorporation or evidence of recognized proprietorship)

- ☐ **Proof of project management training:** Evidence of having provided project management training under your organization name for at least 1 or 3 years, depending on which tier level you are applying to (such as an invoice or customer evaluation)
- ☐ **Documented customer resolution process:** Documentation of your customer issue resolution process
- ☐ **Premier tier financial information:** Premier tier applicants must provide audited financial statements or equivalent documentation demonstrating financial stability after submitting the application as part of the application review process

Application guidance

The following guidance provides additional details about the information and documentation requested in the Application Checklist. Use it to help prepare your application before you begin.

Organization name: It is important that the name that you list within the "Organization Name" entry-field is your organization's formal, legal name.

Tax ID number: Your organization's official tax identification, registration, or business identification number issued by the relevant government or tax authority in your country or region. This may be called an EIN, VAT ID, GST number, business registration number, or another equivalent identifier depending on your location.

Date of incorporation: Enter the official date your organization was legally registered or established. This should align with the documentation you provide as proof of business history.

Primary, Compliance, and Billing contact: This information will pre-populate from the PMI.org account used to start the application. The application submitter will initially be assigned as the Primary, Compliance, and Billing Contact. Contact roles can be updated in the ATP Hub after approval.

Proof of business: Submit documentation showing that your organization has been in business for at least one year for the Access, Foundational, and Professional tiers, or three years for the Premier tier.

Please submit an official, dated document filed with a government agency or with a government-sanctioned agency that officially recognizes the legal establishment of the organization as a business entity.

If your documents are not in English, include a complete translation of each document.

Proof of project management training: Documentation showing that your organization has provided project management training under its organization name for at least one year for the Access, Foundational, and Professional tiers, or three years for the Premier tier.

Acceptable documentation may include a letter from a customer, a customer-completed evaluation form, a dated invoice, or similar documentation showing that your organization provided project management training under its organization name during the required time period.

If your documents are not in English, include a complete translation of each document.

Documented customer resolution process: The ATP application requires a customer resolution document that outlines your organization's remediation process. Please submit a document on your company's letterhead that clearly describes the process your organization will follow if a student is dissatisfied with the course, instructor, materials, or overall learning experience, or raises a related concern. The document should explain the steps your organization will take to address and resolve any student complaints that may arise.

The PMI Grievance Policy is one example of documentation that would meet this requirement: <https://www.pmi.org/-/media/pmi/documents/public/pdf/governance/grievance-policy.pdf>

If your documents are not in English, include a complete translation of each document.

Audited financial documents (Premier tier only): After you've submitted your ATP application, Premier tier applicants will be asked to provide audited financial statements for the past three years, including:

- Income statements
- Statements of cash flow
- Balance sheets

Your financial statements should include the following information:

- Total assets
- Total liabilities

- Current assets
- Current liabilities
- Net income (profit or loss)
- Sales or revenue
- Cash flow from operating activities

These documents help the ATP Support team verify your organization's eligibility for the Premier tier. Applicants at Professional, Foundational, and Access tiers are **not required** to complete the financial review process.

If audits are not required under your local regulations, please let us know when you submit your documents. If your documents are not in English, include a complete translation of each document.

Questions? We're here to help

For technical assistance with the application portal, email atpsupport@pmi.org. For questions about the Authorized Training Partner Program or the application process, email the ATP team at atp@pmi.org.