Tutorial to Verify CE Credits & Returns Filed FOR PTIN Holders

Updated 9-13-2020

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GAEA Education Chair

<u>EA CE Requirements</u>

<u>IRS</u>

- **72 CE total in 3 Year Renewal Cycle**
  - **Minimum of 16 CE total per year in Federal Tax or Federal Tax Update with 2 CE Ethics**

<u>NAEA</u>

- **Minimum of 30 CE per year with 24 CE in Federal Tax or Federal Tax Update**

With 2 CE Ethics

RPO CE PROVIDER PROGRAM NUMBERING SEQUENCE

X9QQU - E - 00279 - 18- I

RPO CE Provider Number

Program Number

Year

18 = 2018

Program Type

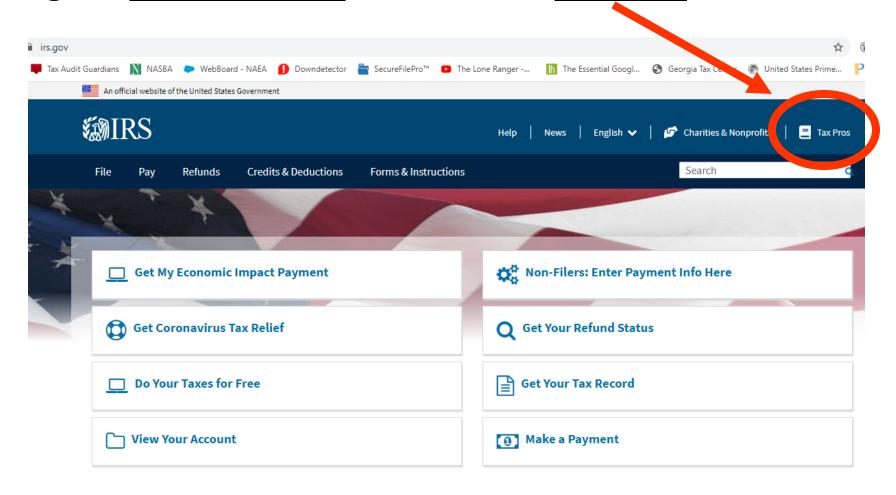- **I** = In Person
- **O** = On Line
- **S** = Self Study

Category

- **E** = Ethics
- **T** = Fed Tax
- **U** = Fed Tax Update
- **P** = SEE Test Prep
- **Q** = Qual Retirement Plan Matters

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Log-In   www.IRS.GOV   1. Select Tax Pros

Home / Tax Professionals

Click on PTIN System

Renew or Register
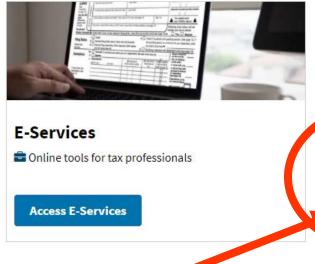
Enter User ID & Password
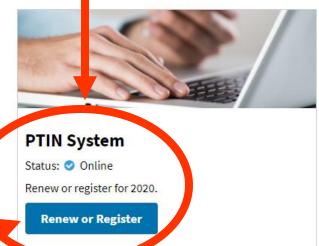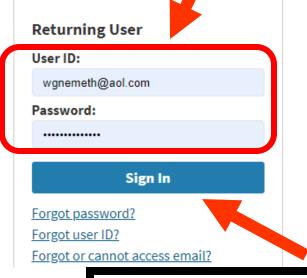
IRS Tax Professional PTIN System

This online system allows you to sign up and renew your **Preparer Tax Identification Number (PTIN)**, keep your account information current, view your continuing education credits and receive communications from the IRS Return Preparer Office.

SYSTEM STATUS: **Sign-up and Renewal applications for the 2020 calendar year are now available.**

Returning User

User ID:

wgnemeth@aol.com

Password:

••••••••••••

Sign In

Forgot password?

Forgot user ID?

Forgot or cannot access email?

New User

You should only create a PTIN account if you 1) prepare federal tax returns for compensation, 2) are an enrolled agent, or 3) intend to become an enrolled agent.
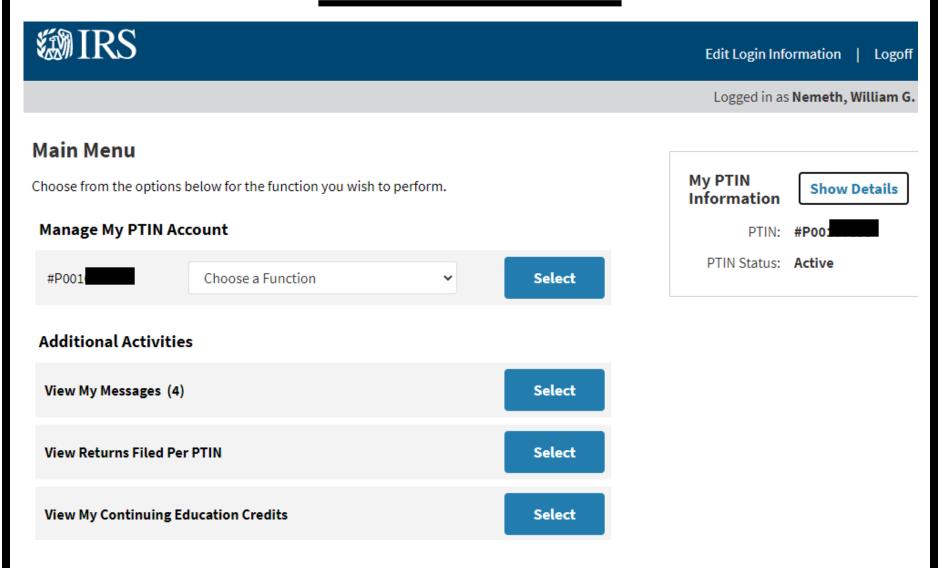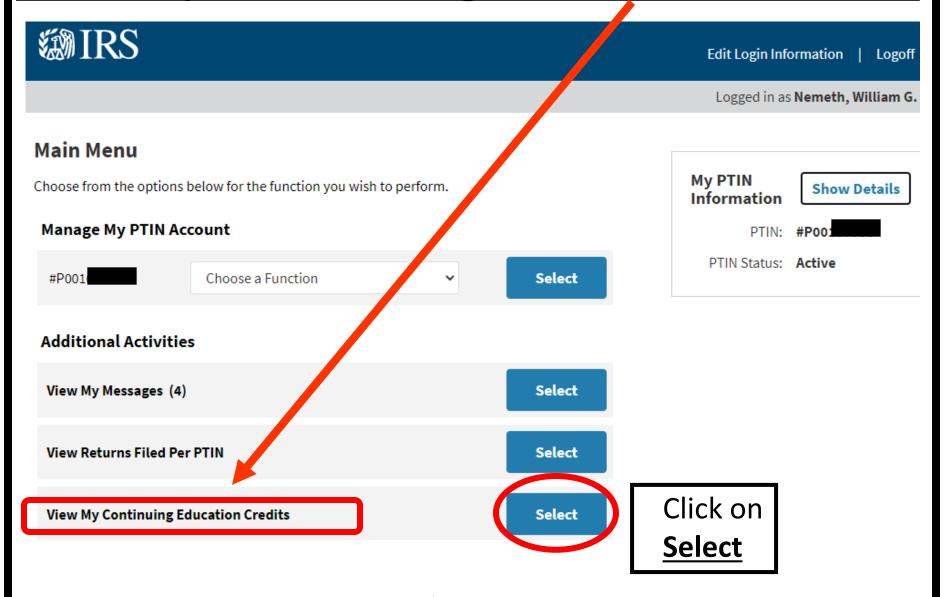
Create Account

Frequently Asked Questions

- How do I access my online account?
- How do I renew my PTIN?
- How do I sign up for a new PTIN?
- I signed up for a new PTIN but how do I know my PTIN status?
- Do I need a PTIN?
- How do I submit a name change request?
- What is the Annual Filing Season Program?

Then Select Sign In

Main Menu

<u>View My Continuing Education Credits</u>

Edit Login Information | Logoff

Logged in as **Nemeth, William G.**

Main Menu

Choose from the options below for the function you wish to perform.

Manage My PTIN Account

#P001⬛⬛⬛ | Choose a Function ▼ | **Select**

Additional Activities

View My Messages (4) | **Select**

View Returns Filed Per PTIN | **Select**

View My Continuing Education Credits | **Select**

My PTIN Information | **Show Details**

PTIN: **#P001⬛⬛⬛**

PTIN Status: **Active**

Click on **<u>Select</u>**

Select Year from Drop-down

View My Continuing Education Credits

Your continuing education (CE) credits are displayed below. View your completed programs by clicking on 'expand'.

If your programs aren't listed or there are any discrepancies with the information listed, you will need to contact your CE provider directly. Common reasons for missing CE include:

- You may have provided an incorrect PTIN or name to the CE provider. Contact your provider to confirm they have your correct PTIN and name.
- Your provider may not yet have sent the data to the IRS. If you provided your correct PTIN and name to your provider and your completed program(s) is not displayed here, contact your provider.

Select Year: 2020 ⌄

2020
2019
2018
2017

Category	Total Credits Earned	
ETHICS	4	expand
FEDERAL TAX LAW	35	expand
FEDERAL TAX LAW UPDATES	19	expand

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Click on <u>expand</u> to get details on each category

View My Continuing Education Credits

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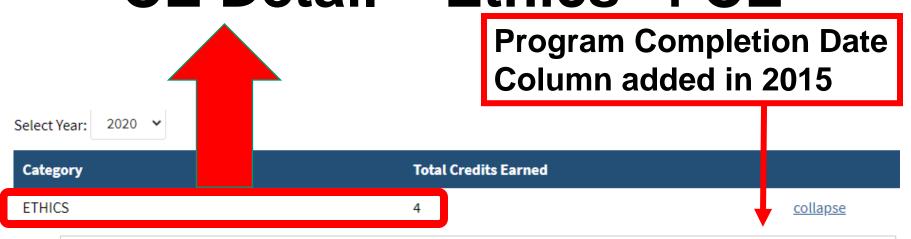**Common reasons for missing CE include:**

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Select Year: 2020 ▾

Category	Total Credits Earned	
ETHICS	4	expand
FEDERAL TAX LAW	35	expand
FEDERAL TAX LAW UPDATES	19	expand

Click on **expand** to get details

CE Detail – Ethics 4 CE

Program Completion Date Column added in 2015

Select Year: 2020 ▼

Category	Total Credits Earned	
ETHICS	4	collapse

Provider Name	Program Title	Program Number**	Completion Date	Credits Earned
National Association of Enrolled Agents	Ethics (2020 MayJune EA Journal)	X9QQU-E-00644-20-S	05/25/2020	2
Internal Revenue Service	Ethics (The Office of Professional Responsibility Circular 230 and Practicing Before the IRS)	CEQXT-E-01229-20-O	06/04/2020	2

FEDERAL TAX LAW	35	expand
FEDERAL TAX LAW UPDATES	19	expand

Each Course is listed with the Provider Name, Program Title, Program Number, Program Completion Date & Credits Earned
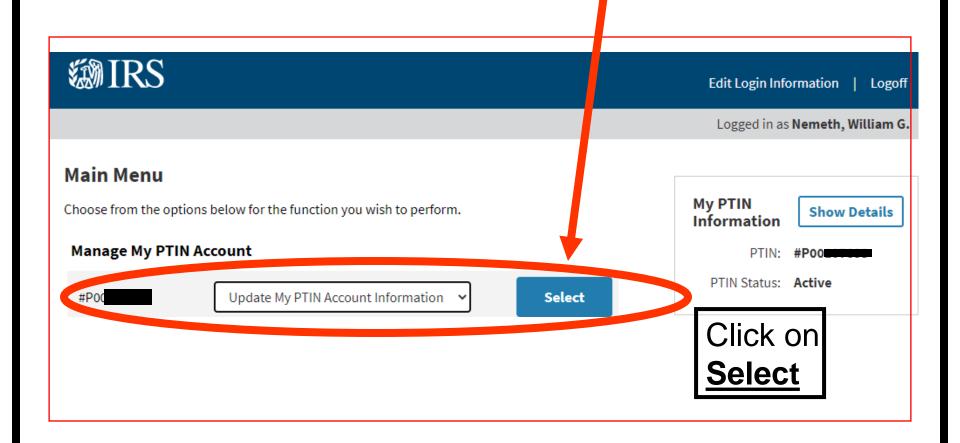
Review your CE

- **Verify that the CE Courses you attended during the year of interest are listed.**

- **If you took a CE Course and it is not listed, the IRS advises you to first check with the CE Provider. If you are not successful with the CE Provider, then go to IRS.GOV and pull up:**

  <u>Form 14360</u>,   Continuing Education Provider Complaint Referral

  Fill out & mail it to the IRS CE Office.

- **Each CE Provider is supposed to upload CE info by the end of each quarter; recommended upload during the 4ᵗʰ quarter is 10 days from completion of course.**

Update MY PTIN Account Information

Important if you renewed your EA License late last year AFTER you renewed your PTIN – EA Database and PTIN Database ARE NOT Linked Together

IRS

Edit Login Information | Logoff

Logged in as **Nemeth, William G.**

Main Menu

Choose from the options below for the function you wish to perform.

Manage My PTIN Account

#P00‐‐‐‐‐‐   Update My PTIN Account Information ˅   **Select**

My PTIN Information   **Show Details**

PTIN: **#P00‐‐‐‐‐‐**

PTIN Status: **Active**

Click on **Select**

NEW Feature – April 2015
View Returns Filed Per PTIN

Main Menu

Choose from the options below for the function you wish to perform.

Manage My PTIN Account

#P00107893	Update My PTIN Account Information ⌄	**Select**

Additional Activities

View My Messages (4)	**Select**
View Returns Filed Per PTIN	**Select**
View My Continuing Education Credits	**Select**

Returns filed Per PTIN – Threshold is 50 returns

Has my PTIN been Hi-Jacked ?

Summary of Returns Filed

See the chart below for the number of tax returns with your PTIN processed by the IRS **this year**. The data is updated weekly and includes only Form 1040 series returns **processed** through the date specified.

If the number is **substantially higher** than the number of tax returns you've prepared and you suspect possible misuse of your PTIN, complete Form 14157.

If the number is **substantially lower** than the number of tax returns you've prepared, you need to verify that you are entering your PTIN correctly on returns. The most common cause of this problem is the entry of an incorrect PTIN during tax preparation software setup.

Definitions:
- Processing Year: the current calendar year
- Tax Year: the tax year of the returns
- 1040s Processed: includes **only** 1040 series returns (1040, 1040-PR, 1040-SS, 1040A, 1040EZ, 1040EZ-T, 1040NR, and 1040NR-EZ)

78 Returns as of 09/09/2020

2 week lag time

Processing Year	Tax Year	1040s Processed
2020	2019	72
2020	2018	4
2020	2017	2

1040 Returns e-Filed per PTIN

Returns filed per PTIN

CE Review Feedback

- **This presentation was created to help Tax Professionals access & verify their Continuing Education Credits & PTIN Info.**

- **If you would like to send the author feedback, please sent an e-mail to:**

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