Semi-annual Provider Calls

September 25, 26, 27, 28, 2018

2019 Renewals

The CE Provider vendor fee for this year's renewal has been reduced from $565 to $460. For more information, please refer to the secure message we sent you on 09/21/18. As you're getting ready for your renewal, please keep in mind that the vendor does not take American Express as a credit card payment. Second, in your user guide, there are step by step instructions for renewing your CE Provider account. The user guide can be found under Resources & Help on the right side of your CE Provider account home screen and it is a new version, 3.1, posted on Friday, 9/21. Renewals will officially begin on Monday, Oct 1, 2018. The deadline to renew for 2019 is 12/31/18 before the applicable late fees kick in.

Provider Information Page

To begin renewing for the upcoming year, the Primary Point of Contact (PPOC) should click the red "Renew now for 2019" button in the top right-hand corner of your provider home screen. You will be required to verify the correctness of your CE Provider account information, including Provider Website URL, address, and phone number. If changes need to be made, the edit function is available. All fields are editable except for CE Provider Name, Sole Proprietor, and EIN/PTIN. If any of this information needs changed, you will need to contact the help desk and provide proof of the change.

PPOC Information Page

You will then be prompted to verify the correctness of your current PPOC information, including address, work phone, cell phone, and email address. PLEASE check this information as we have gotten many returned e-mails and have been unable to contact some CE Providers by phone. If you have an extension to your phone, please make sure that's included. If you have a mobile phone as an alternative, please add that as well so we have several ways to reach you if necessary.

If for some reason you will not be the PPOC moving forward, you can follow the "change the PPOC" link in the "note" at the top of the PPOC page. Your access will not be removed until the "reassigned PPOC" receives an e-mail to log in to the system to set up their account and that function is completed.

Administrative Point(s) of Contact Page

You will then be prompted to update, delete, or add a new Administrative Point of Contact (APOC). You SHOULD NOT have the PPOC listed as the APOC as this is only a duplication of efforts and will cause you to get multiple e-mails about the account, which may become confusing. The PPOC has full control of the account, where an APOC will only have access to manage programs and PTIN reporting, all other provider features will be view only. We recommend you include any individuals you wish to talk with the IRS regarding your programs be listed as an APOC. If for some reason we cannot get a hold of the PPOC, we will contact the APOC(s). If the APOC can't answer our questions or we are asking for information only the PPOC should be giving us, we will ask for the PPOC's contact information or make a request to the APOC for the PPOC to contact us.

Existing Program Renewal Options Page

This year you will only have two choices, you can either choose to continue using a program "as is", or choose NOT to retain the program for the upcoming calendar year. We removed the "edit program" option due to the feedback we received after last year's renewal season. Many of you indicated the process took too long for the system to update each program in real time and by removing the rarely used edit function, the renewal process should move much faster. However, for CE Providers with hundreds or thousands of programs, it will still take some time to complete your renewal.

This year, we have added a status indicator to the program renewal screen, so you can see how far along you are in the process. For example, you are on record 37 of 299. This information will be posted at the top of your programs grid and should help you to understand where you are in the list of programs and how many are left

We also HIGHLY RECOMMEND that before you begin the renewal process, you print out your detailed program listing. You can do this by clicking on the "Programs/Manual PTINs" link on the left side of your home screen, then clicking on the "Export Program Listing" button found on the upper right side of the programs page. Save and print this Excel spreadsheet to refer to during the renewal process. You do not have all the program details available on the renewal screen, but if you have your program listing handy, it will display the program number, title, description, credit hours, category, and audience type. This will be valuable in helping you determine whether to continue using a program or to delete it. As a reminder, the programs will be listed in category order (beginning with your federal tax update programs, federal tax, ethics, etc.) and, within the category, you will see the program numbers in descending order.

Please do NOT carry over anything from prior years that you will not continue to offer. We have found many prior year programs still in provider accounts, and based on the descriptions and/or the category, we don't believe they are being used or meet the requirement to be current tax law. Let me give you some examples: (1) “2014 Tax Update”! This should not be brought over! Please review the definition of a federal tax update if you aren’t sure, but old tax update information is no longer relevant if there have been changes in the law. If that’s not the case but it’s still relevant for any tax year so far, it’s no longer a federal tax law update, but a federal tax program; (2) “Exemptions for dependents” as a 2014 program. With the new TCJA changes, you will find that many programs like this are no longer relevant! That means that these programs should be deleted from your account and a new program number added that reflects the new TCJA content if you are going to continue with that program. Also, keep in mind that no one will take a program from prior year tax law changes unless that year is still open for filing; (3) Ethics program dated 2013. If you remember, the latest version of Circular 230 is dated June of 2014…anything prior to that does NOT reflect the current version and should be removed.   As a reminder, data security/ID theft programs should be labeled as federal tax law, not ethics. And, as I said previously, you will now need to consider how programs need to change as a result of TCJA and any old programs that don’t reflect current law need to be removed from your account unless they are specifically marked for prior year amended and/or neglected filings for open years.

But remember to “Continue Using” any program where you will have PTINs to report with completion dates in 2019, such as a self-study program that a student purchased in July of 2018 and has until July of 2019 to complete. This will ensure that you can report their 2019 completion records during 2019.

This year, programs will be processed in groups of 100 programs per page, unless you have less than 100 programs. In that case, all your existing programs will display on one page and they will all update once you have completed designations for all of them on the page

Once you click the “Save Program Renewal Options and Continue” button at the bottom of the screen, additional programs will be displayed so you can continue the selection options until you have made a selection for all existing programs. If you have a large number of programs and are unable to complete the entire process at one time, the system will automatically save the options you have already selected and you will be able to pick up where you left off and continue your application at any time.

You will have the opportunity to add new 2019 programs after you are done making selections for your existing programs. Also, if you need to add 2018 programs, you should add those after you have completed the renewal process as only the 2019 option will be available at renewal. If you are adding a 2018 program that you want to also offer in 2019, you will have a radio button option to do so after your renewal.

Payment Options Page

As mentioned earlier, you all should have received a secure message in your CE Provider mailbox on 09/20/18 informing you that the annual CE Provider vendor fee was reduced from $565 to $460 for 2019.

You must select one of three methods of payment:

- Credit / Debit Card
- Bank Account (ACH)
- Invoice (Check Payment)

The ONLY acceptable credit card types are Visa, MasterCard, and Discover.

Credit/Debit Card Payment Page

When credit/debit card is selected, a Master Card, VISA, or Discover Card can be used for payment. As was the case in prior years, the vendor does not accept American Express. You must enter your card information, including:

- Credit Card Number and Expiration Date
- CCV number
- Name of Card Holder and Billing Address

You will then be prompted to select the checkbox acknowledging the payment terms.

Bank Account (ACH) Payment Page

If bank account (ACH) is selected, you are choosing to pay using your bank account by entering your bank account information. Required fields include:

- Check Type and Check Number
- Bank Routing Number and Bank Account Number (both fields must be confirmed)
- Billing information including name, address, phone and email

You are then prompted to select the checkbox acknowledging the payment terms and pressing the "Process Payment and Complete Registration" button.

Mailed-In Check Payment (Print Invoice)

Providers can elect to print their invoice for the renewal fee amount and mail in their payment to the IRS (Advocation Strategies, Inc.).

Note: the renewal application will not be completed until payment has been received and the check clears the bank. Once this occurs, you will be able to access the receipt, renewal letter, and renewal application on-line from your CE Provider account. If you elect to pay by check and you are close to the 12/31 deadline, your payment must be postmarked by midnight on the last day of the month during which you applied or renewed to avoid the late fee charge. If you have any technical issues during the renewal process, please call the CE Provider Help Desk at 888-316-7581 M-F between 8:00 a.m. - 6:00 p.m. ET.

Hot Topics

Reminders for the AFSP/AFTR:

- Deadline for getting an AFTR program number is October 1. The system will not issue program numbers after that date, so please ensure if you are offering an AFTR course/test, you have a program number by then.
- Deadline for the AFTR course/test completion for preparers is 12/31/18 at midnight local time. Please make sure your students are aware if you are offering this course. You have ten business days after completion to upload the PTIN records. ALL CE must be complete by 12/31/18 for the AFSP Record of Completion.
- AFSP information
    - We will be sending a reminder to unenrolled preparers in October reminding them of the option to participate in AFSP
    - At the beginning of December, we will send reminders to those who are very close to the CE requirements for AFSP that they have until 12/31 to complete the CE requirements
    - The AFTR course completions are up this year, so thank you!
- PTINs are still free! The PTIN system will open mid-Oct for PTIN renewals and new 2019 registrations. As a reminder, at that time, if a preparer meets all the AFSP qualifications including the appropriate CE, they will be given the Circular 230 consent to sign.
- PTIN uploads are required Oct 1 – Dec 31 within 10 business days of program completions. This will help our AFSP-eligible preparers sign the Circular 230 statement during their renewal instead of having to come back into the system later.
- You can expect the CE team to call or e-mail you at some point and we want to ensure you know the team members so you aren't worried about whether we really work for the IRS. Shannon Simpson and Karen Ferrell (Copeland) deal a lot with the CE Provider and secure mailboxes. Tim Owen is our review analyst and he has been contacting all Providers offering the AFTR course/test. Once AFTRs are finished, we will go back to random reviews, so if you hear from him, please return his call/e-mails as soon as possible. Rita Barnett does the scheduling of the CE Provider calls and you can expect to hear from her with your confirmation. Sue Gaston is the Director of Continuing Education and, occasionally, may need to contact you via phone or e-mail with questions or concerns. We will be bringing on a couple of new Review Analysts soon, so we will make sure you have their names as well. We will also start publishing all our

names in the CE Provider Newsletter than we deliver twice annually so you're up to date with potential contacts.

CE Provider Logo:

- On 07/18/18, we delivered the new logo for IRS Approved Continuing Education Providers to replace the one we previously created in 2012. Please ensure you are using the new logo.
- Review your websites, advertisements, and materials to ensure you substitute the new logo everywhere you are using the IRS CE Provider logo. I have found that you may have it on your Certificate of Completion, but the old logo may have been missed elsewhere on your web site. We did say if you only update your web sites periodically, that you could do it in the next update. However, if you've done it in one place and missed it in others, we would appreciate the correction as soon as possible.
- Look for our CE Provider Insider Newsletter coming in November, and our next CE Provider conference call will be in March of 2019!