

DRAFT SCREEN IMAGES

New CE Provider System

Screens will look similar to mock-ups below

Provider Account Homepage

IRS Continuing Education Provider System Log-out

Welcome

Provider Account

- Public Listing
- Administrative POC(s)
- Programs
- PTIN Upload
- Complaint Referrals
- Reports

Registration OPEN

REGISTER NOW!

Main Menu

15WC – ABC Education Online (APPROVED)

News and Alerts

- 5/31/2016 – Renewal Registration Starts Today!
- 5/30/2016 - Don't forget to update your CE Provider information that is now listed in the IRS-Approved Provider List on the website.

Provider Registrations

Calendar Year	Status	Options
2016	Pending Payment	invoice application
2015	Approved	receipt application denial Submit Appeal
2014	Approved	receipt application approval

CE Provider Secure Mailbox

Filter by Year: [2016](#) - [2015](#) - [2014](#) - [2013](#) Filter by: [Received](#) - [Sent](#)

Date	From	Subject	Attachment
6/1/2016	IRS CE Staff	Completed Form 9999 Attached	YES
6/1/2016	IRS CE Staff	Completed Form 9999 Attached	YES
6/1/2016	IRS CE Staff	Completed Form 9999 Attached	YES
6/1/2016	IRS CE Staff	Completed Form 9999 Attached	YES

<< 1 2 3 4 5 >> [Send Message to IRS](#) (?)

Resources and Help

- [How to add PTIN records](#)
- [How to add a new program](#)
- [When can I renew my registration?](#)
- [How to file a complaint?](#)

CE Provider

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Point of Contact Roles

CE Provider Help



Principal Point of Contact Access
The Principal POC will be the person responsible for interaction with the IRS, will be sent all letters/communications, and will have permission to perform all tasks within the CE system. A Principal will be the only one allowed to renew an application and edit information in the Provider account.

Administrative Point of Contact Access
The Administrative POC will be able to edit their own POC information, receive general messages in the account's secure mailbox, will be able to add programs and submit PTINs. They will have read only access to the CE Provider application itself and this person will also be able to send and receive messages to and from the IRS.

Close

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Provider Information – Principal Point of Contact (PPOC)

Continuing Education Provider System

CE Provider Renewal Registration (Provider Account Information)

Please enter information about your organization and organization's point of contact below. The point of contact must be available to answer questions about your organization and application information.

[Click here to view what's required for Continuing Education Provider Renewal Registration](#)

If you are the current point of contact you can make changes to your information here. If you are assigning a new principal point of contact to replace you, click the button "Assign New Principal Point of Contact" below.

Note: Once you assign a new principal point of contact your account will be de-activated and will no longer work once you log out of the system.

Continuing Education Provider Information

CE Provider Name: **ABC Provider Company Name**

Sole Proprietor? EIN: **99999999** PTIN:

Provider Website URL:

Country:

Street Address:

Street Address Line 2:

City: State/Province: Zip/Postal Code:

Provider Phone:

Organization's Principal Point of Contact Information

First Name: MI: Last Name: Suffix:

Country:

Street Address:

Street Address Line 2:

City: State/Province: Zip/Postal Code:

Work Phone: Ext: Cell/Mobile Phone:

Email: Confirm Email:

Organization's Principal Point of Contact Login Information

Enter a User ID and secret question and answer that you would like to use to create your account. All future correspondence with the IRS will be sent to this account's secure inbox, so be sure to note your login information.

User ID: Confirm User ID:

Password: Confirm Password:

Security Question:

Answer:

CE Provider

[CE Provider Information Line](#) | [CE FAQs](#) | [IRS Privacy Notice](#)

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Provider Information – Administrative Point of Contact(s) (APOC)

Continuing Education Provider System

CE Provider Renewal Registration (Administrative Point(s) of Contact Information)

Administrative Point(s) of Contact.

Add or update Administrative Point(s) of Contact below.

Administrative Point(s) of Contact Assigned:

[Add New](#)

-  [Update](#) [Delete](#)

Administrative Point of Contact Information 

First Name: MI: Last Name: Suffix:

Country:

Street Address:

Street Address Line 2:

City: State: Zip:

Work Phone: Ext: Cell/Mobile Phone:

Email: Confirm Email:

[Save Changes](#)

[Back](#)

[Done Adding Administrative Contacts – Continue Registration](#)

CE Provider

[CE Provider Information Line](#) | [CE FAQs](#) | [IRS Privacy Notice](#)

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Programs

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15WC – ABC Education Online

[Program Listings](#)

Select from program options below.

Filter by year: [2016](#) [2015](#) [2014](#) [2013](#)

The Ethics Involved in Tax Return Preparation 15VVC-E-000002-13-I

Category: Ethics

Hours: 2

Delivery Method: In Person, Online/Group

Target Audience: Return Preparers

Update

Delete

PTIN Manual Reporting

Affordable Care Act 15VVC-E-000003-13-I

Category: Ethics

Hours: 2

Delivery Method: In Person, Online/Group

Target Audience: Return Preparers

Update

Delete

PTIN Manual Reporting

PTIN Upload

Add Program

CE Provider

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Add/Edit Programs

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[Add/Edit Program](#)

Please enter the information about the program that you would like to offer. You must enter all program information in English, even if the programs are offered in other languages. Learn more about each of the program categories [here](#).

Program Information

Program Name:

Credit Hours:

 ?

Brief Description (50 to 1000 characters – [view sample](#))

Category:

▼

 ?

This program is offered (check all that apply):

In Person Self-Study Online Group (Internet based)

This program will support the CE requirements for the following tax professionals (check all that apply):

Other Tax Return Preparers ? Enrolled Agents Enrolled Retirement Plan Agents

Cancel Save Changes

CE Provider

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Manually Reporting PTIN's

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15WC – ABC Education Online

[Program PTIN Reporting](#)

The Ethics Involved in Tax Return Preparation 15VVC-E-000002-13-I

Category: Ethics

Hours: 2

Delivery Method: In Person, Online/Group

Target Audience: Return Preparers

Manual PTIN Reporting

First Name: Last Name: PTIN:

Program Number: 99999999 CE Credit Hours: Program Completion Date:

Instructor Hours

[Clear Fields](#) [ADD PTIN](#)

PTIN's Reported for this Program

Last Name: PTIN: Completion Date: [Search](#)

First Name	Last Name	PTIN Number	Program Number	CE Credit Hours	Program Completion Date	Options
John	Smith	[REDACTED]	99999999	15	5/31/2016	remove
Mary	Smith	[REDACTED]	99999999	15	5/31/2016	remove
Kevin	Smith	[REDACTED]	99999999	15	5/31/2016	remove
George	Smith	[REDACTED]	99999999	15	5/31/2016	remove

[Return to Programs](#) [PTIN Upload](#)

CE Provider

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PTIN Upload Reporting

Log-out

Continuing Education Provider System

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[Redacted]

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15WC – ABC Education Online

[PTIN Upload](#)

Instructions

To report Continuing Education Provider PTIN Upload Data, complete a PTIN Records Submission Report ([download a copy here](#)).

Note:

- Each row must be fully completed.
- Follow the formatting rules included in the report.
- All PTINs must begin with a "P", followed by eight numbers. Do not use hyphens or spaces.
- Use the following format for the date field: mm/dd/yyyy.
- Credit hours must not exceed the number of hours approved for the program.
- Do not report anticipated future credit hours.

To upload your report, click the Browse box below to locate the saved file on your computer. Once you have located your file, click the Upload button.

NOTE: Your file will not be submitted if you do not select Upload File.

After submission

After your file is submitted, the information will be validated for completion and accuracy. This process will be completed automatically. Once your file has been validated, you will be able to review the results.

If any data item in the file can not be validated, you will be able to view or export the invalid records in order to correct and resubmit. You will be able to process all valid records.

Note: You will have a chance to review this data before final submission.

PTIN Records Upload: Please select your completed CE PTIN Records Submission Report (.xlsx or .xls format) and click the upload button. The maximum file size is 2MB.
It may be necessary to close the file on your computer prior to uploading.

Select File to Upload:

IMPORTANT: You must click the "Upload" button to attach your file.

CE Provider

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PTIN Upload Verify

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15WC – ABC Education Online

PTIN Upload

The following records have been found in your import file.

Validated PTIN records are shown in grey below and are ready to be processed by clicking the "Process Valid Data" button at the bottom of the screen. **Records will not be added until you click on the "Process Valid Data" button.**

Invalid PTIN records are shown in red. The reason the record rejected can be found in the "Status" column below. Rejected records need to be corrected and resubmitted.

Questions, please refer to your "[PTIN Reporting Help Guide](#)".

You MUST print or export your error(s) so you have a copy of the rejected record(s) that need to be corrected. If you do not print or export your error(s), your valid data will be submitted, but you will not have a copy of rejected record(s) that need to be fixed and resubmitted.

PTIN Records Found

First Name	Last Name	PTIN Number	Program Number	CE Credit Hours	Program Completion Date	Status
John	Smith		99999999	15	5/31/2016	Valid
Mary	Smith		99999999	15	5/31/2016	ERROR – INVALID PTIN #
Kevin	Smith		99999999	15	5/31/2016	Valid
George	Smith		99999999	15	5/31/2016	ERROR – INVALID PROGRAM #

[Click Here To Process Valid Data](#)

[Print Errors](#)

[Export Errors](#)

[Cancel](#)

CE Provider