

## **How to Create Your Online Prometric Account and Schedule Your IRS Special Enrollment Examination Appointments**

Before scheduling a Special Enrollment Examination appointment online, candidates must first create an account and a user profile in **Prometric's Candidate Management System (CMS)**.

The CMS includes online service tools to help you manage your test appointments and view the history of your Prometric testing events.

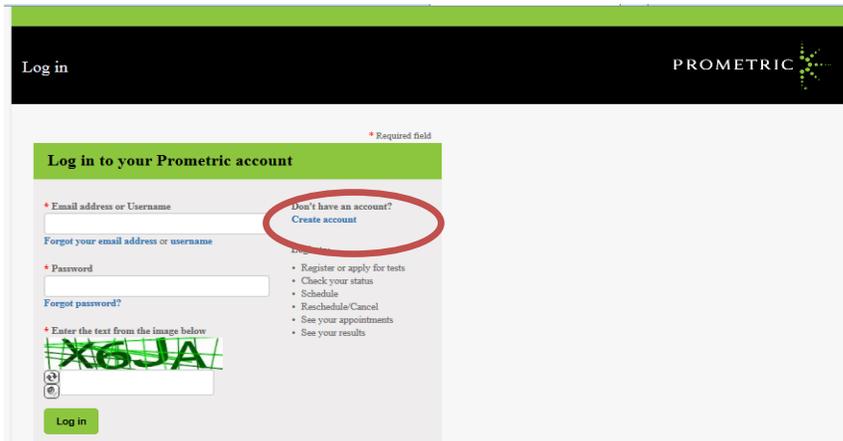
This user guide includes instructions for creating your CMS account and user profile, scheduling a testing appointment, and navigating your account.

**If you need assistance, you may call Prometric's customer service line at 1-800-306-3926, Monday through Friday, 8:00 a.m. to 9:00 p.m. Eastern time.**

## Creating a new CMS account or logging into an existing account

### A. Create your online account (**first-time users**)

Visit <https://www.prometric.com/SEE>, and select "Create an Account"  
From the Log in page, click on "Create Account"



Provide the following information then click "Create account":

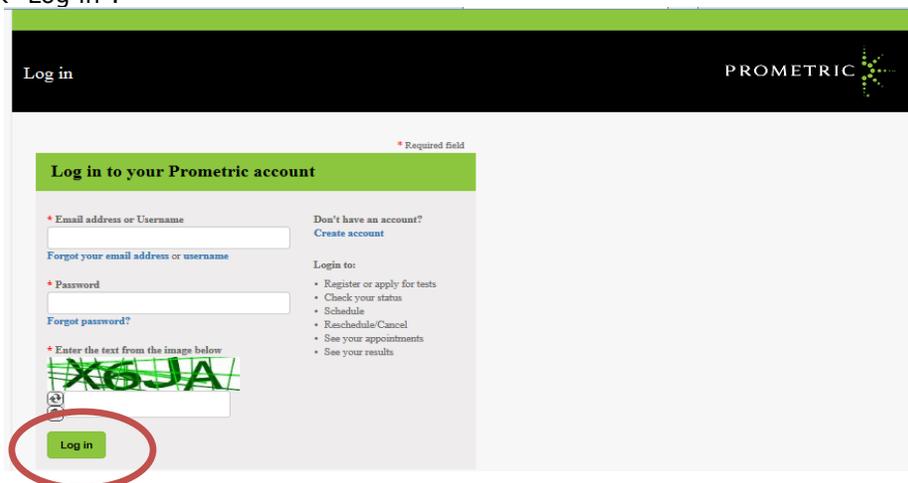
- Username
- Email Address
- Confirm Email address
- Password
- Re-enter password
- Check the box that you have read and agree to the Prometric Data Privacy Policy
- Enter text from the image
- Click on "Create account"

You will receive an account activation email. **You must click the link provided in the email within 24 hours to complete your account creation.** If you do not do this, after 24 hours you must recreate your account. After clicking the link in the email, you will be directed to the Log in page. Follow the instructions in section B below starting from the Login page.

### B. Log into your account (**existing users**)

Visit <https://www.prometric.com/SEE>, and select "Schedule My Test"

From the Log in page, enter your username or email address, password, and text from the image. Then click "Log in".



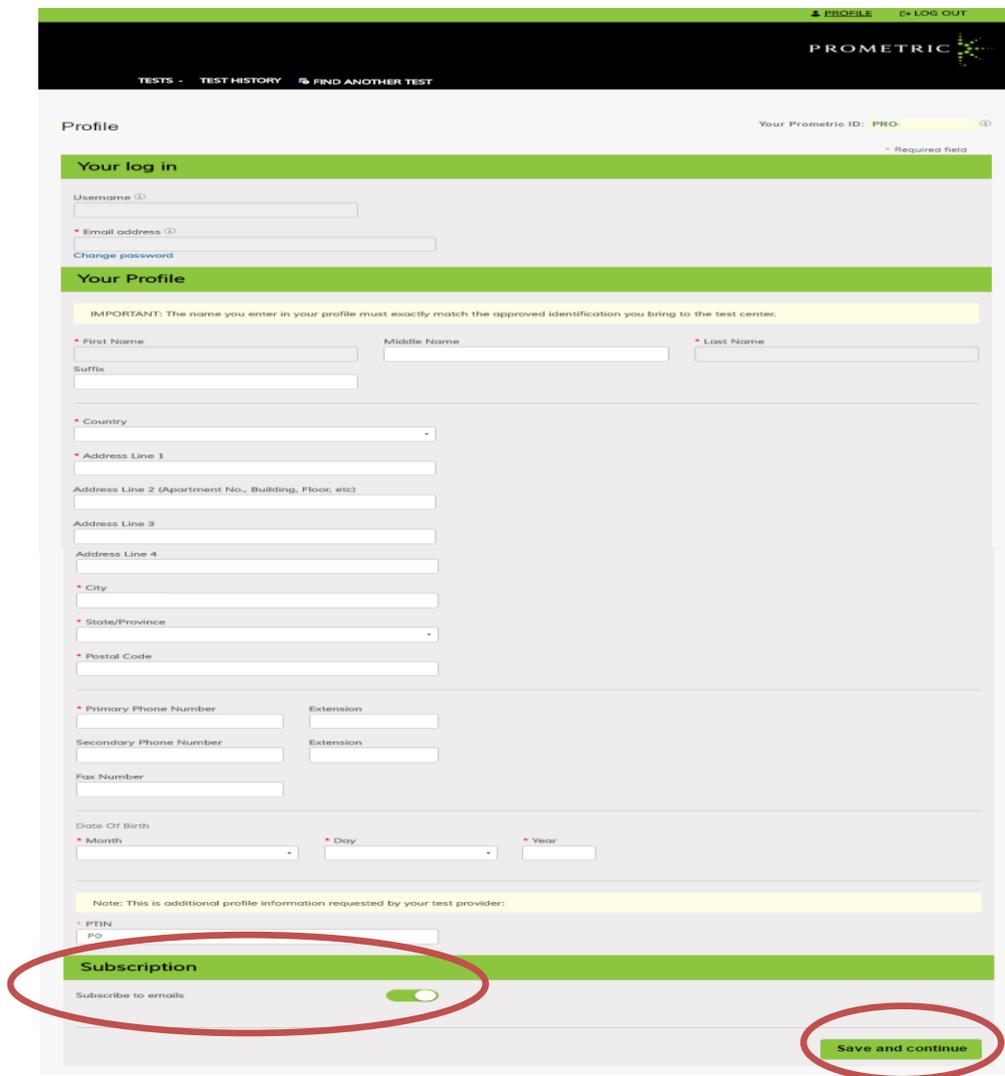
### C. Update your profile

After logging in to your account, add your **profile** information. Red asterisks indicate required fields and include:

- First name, middle name, last name
  - The name you enter into your profile must **exactly match** your government-issued ID
- Country (select from drop-down menu)
- Address, City, State/Province, and Postal Code
- Primary Phone Number
- Date of Birth (select month and day from drop-down menus then type the year)
- Preparer Tax Identification Number (PTIN)

If you do not wish to subscribe to email notifications, under "Subscription" move the circle to the left. Click "Save and continue"

**After providing your profile information, please review it for accuracy.** You can access and update your profile page at any time by selecting "Profile" at the top of the Webpage.

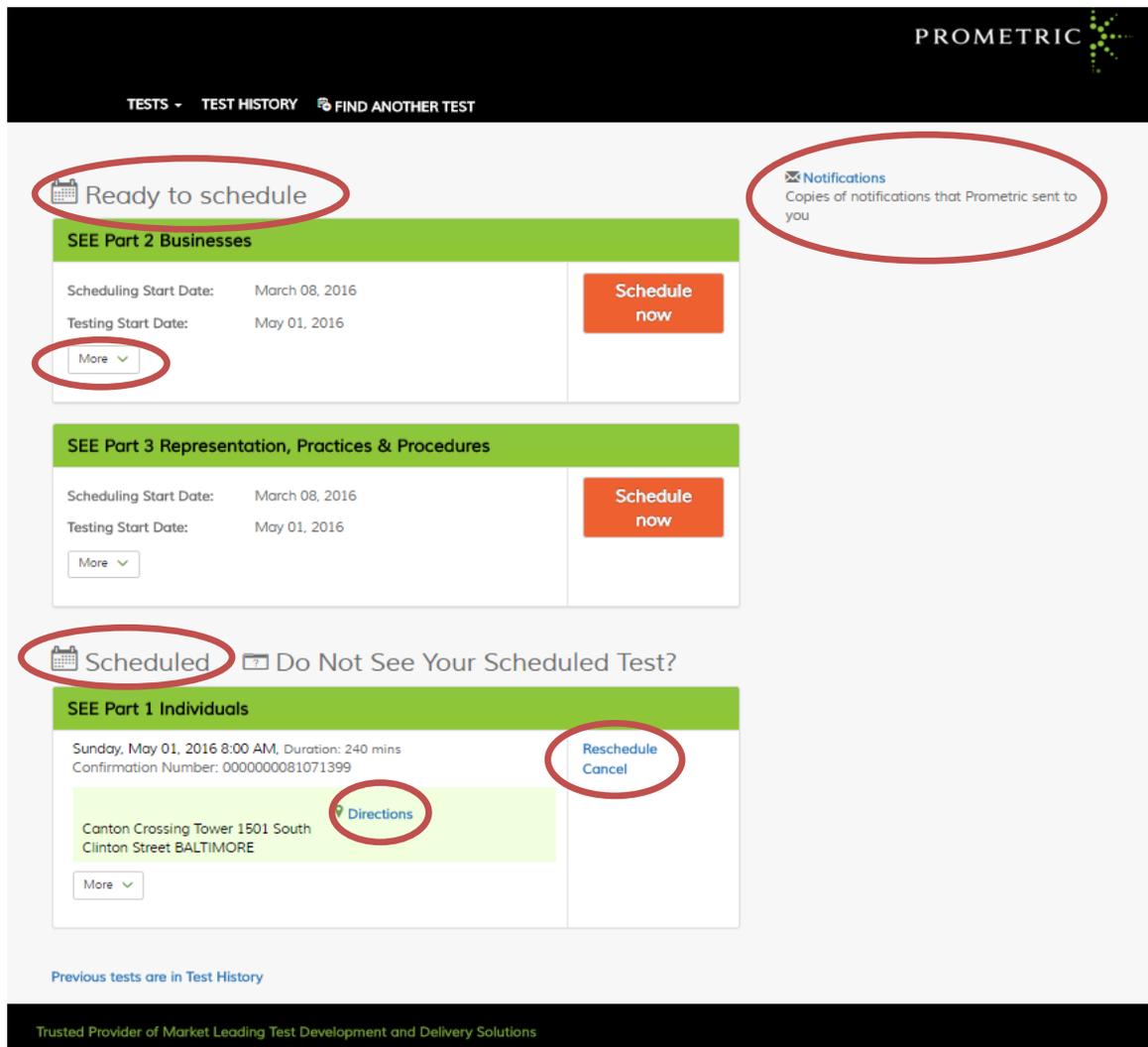


The screenshot shows the Prometric Profile page. At the top, there are navigation links for "TESTS", "TEST HISTORY", and "FIND ANOTHER TEST". The main heading is "Profile" with a "Your Prometric ID" field. Below this is a "Your log in" section with fields for Username and Email address. The "Your Profile" section contains various fields for personal information, including First Name, Middle Name, Last Name, Suffix, Country, Address Lines 1-4, City, State/Province, Postal Code, Primary and Secondary Phone Numbers with Extensions, Fax Number, and Date of Birth (Month, Day, Year). A note indicates that PTIN is additional information requested by the test provider. At the bottom, the "Subscription" section has a toggle switch for "Subscribe to emails" and a "Save and continue" button. Red circles highlight the "Subscription" section and the "Save and continue" button.

## Candidate Account

From the Candidate Account page, you can schedule a Special Enrollment Exam appointment, reschedule or cancel an existing appointment, and view your examination history.

- Examination parts that are available to schedule appear in the “Ready to schedule” section. See “Scheduling an appointment” on page 5 of this job aid for instructions.
- Examinations that have already been scheduled appear in the “Scheduled” section. To reschedule or cancel the appointment, click on the “Reschedule” or “Cancel” link beside the examination name and follow the prompts (the cancellation and rescheduling policy can be found in the Candidate Information Bulletin). Click on the “Directions” link to obtain directions to the test center.
- To request a replacement confirmation email, select “More” under the applicable appointment then click “Resend Confirmation email”.
- Click on the “Notifications” link in the upper right corner to view copies of prior email notifications from Prometric.
- See page 8 of this job aid for instructions to review your examination history.



The screenshot displays the Prometric Candidate Account interface. At the top, there is a navigation bar with 'TESTS - TEST HISTORY' and 'FIND ANOTHER TEST'. The main content is divided into two sections: 'Ready to schedule' and 'Scheduled'.

**Ready to schedule section:**

- The 'Ready to schedule' header is circled in red.
- There are two test options: 'SEE Part 2 Businesses' and 'SEE Part 3 Representation, Practices & Procedures'.
- Each option shows 'Scheduling Start Date: March 08, 2016' and 'Testing Start Date: May 01, 2016'.
- A 'Schedule now' button is present for each option.
- A 'More' dropdown menu is circled in red for each option.
- A 'Notifications' link is circled in red in the upper right corner, with the text 'Copies of notifications that Prometric sent to you' below it.

**Scheduled section:**

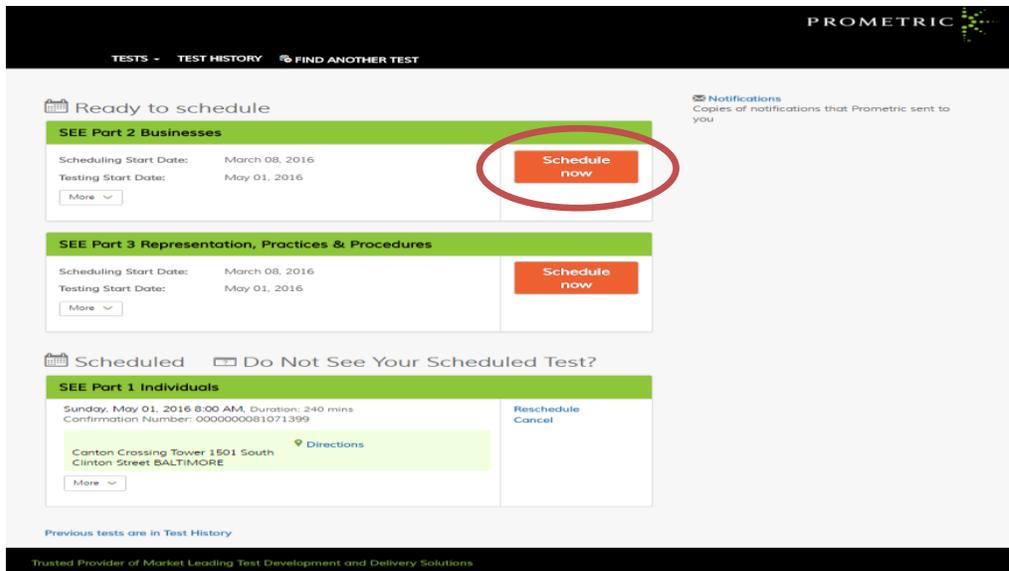
- The 'Scheduled' header is circled in red.
- The section title is 'Do Not See Your Scheduled Test?'.
- The test option is 'SEE Part 1 Individuals'.
- Details include: 'Sunday, May 01, 2016 8:00 AM, Duration: 240 mins' and 'Confirmation Number: 0000000081071399'.
- Buttons for 'Reschedule' and 'Cancel' are circled in red.
- A 'Directions' link is circled in red.
- The test location is 'Canton Crossing Tower 1501 South Clinton Street BALTIMORE'.
- A 'More' dropdown menu is present at the bottom.

At the bottom of the page, there is a footer: 'Trusted Provider of Market Leading Test Development and Delivery Solutions'.

## Scheduling an appointment

To schedule a new appointment from the Candidate Dashboard:

- Click "Schedule now" next to the examination part you wish to schedule.



The screenshot shows the Prometric Candidate Dashboard interface. At the top, there is a navigation bar with 'TESTS - TEST HISTORY - FIND ANOTHER TEST' and the Prometric logo. Below this, the 'Ready to schedule' section is visible. It contains three main sections:

- SEE Part 2 Businesses:** This section displays 'Scheduling Start Date: March 08, 2016' and 'Testing Start Date: May 01, 2016'. A red circle highlights the 'Schedule now' button.
- SEE Part 3 Representation, Practices & Procedures:** This section also shows 'Scheduling Start Date: March 08, 2016' and 'Testing Start Date: May 01, 2016', with a 'Schedule now' button.
- Scheduled:** This section includes a checkbox for 'Do Not See Your Scheduled Test?'. Below it, 'SEE Part 1 Individuals' is listed with details: 'Sunday, May 01, 2016 8:00 AM, Duration: 240 mins, Confirmation Number: 000000081071399'. It also shows the location 'Canton Crossing Tower 1501 South Clinton Street BALTIMORE' and a 'Directions' link.

At the bottom of the dashboard, there is a footer that reads 'Trusted Provider of Market Leading Test Development and Delivery Solutions'.

- Read the Information Review and Privacy Policy Review pages (scroll down to see all pages) and then click "Next".
- Eligibility Information – Select "no" or "yes" as to whether you have been pre-approved by a Prometric representative for a testing accommodation then click "Next". Testing accommodations, such as adaptive equipment or a sign language interpreter, guarantee equal opportunity for individuals with disabilities under the Americans with Disabilities Act (ADA). If you require testing accommodations for your testing appointment, please call 1-800-967-1139 to request a testing accommodations request packet **BEFORE** scheduling your appointment.
- Search for and select a test center by entering the city and state or zip code of the location you wish to test then click "Search". Tip: to locate the nearest test center, enter your zip code and then click the down arrow next to the Search Area and select 25 miles. If no results are presented, broaden your search by selecting 50 miles.
- A listing of nearby test centers will be provided. Select "Schedule an Appointment" next to the desired test center.

**NEW APPOINTMENT: TEST CENTER SELECTION**

Your search returned more than 20 sites. Only the nearest 20 sites have been displayed.

**Test Center Selection**  
To find the closest location(s), please enter a preferred address, city/state, or ZIP/postal code where you would like to schedule your appointment in the search box below.

21224  
e.g., "1501 Clinton St, Baltimore, MD" or "Paris, France" or "90210"

2001 - Baltimore - South Clinton Street  
1501 South Clinton St  
13th Floor, Canton Crossing  
Baltimore, MD 21224  
[Schedule an Appointment](#)  
[Get Directions](#) (<5mi)

0092 - Baltimore - Towson  
8601 LaSalle Road  
Suite 106  
Towson, MD 21286  
[Schedule an Appointment](#)  
[Get Directions](#) (<16mi)

0084 - Baltimore - Columbia  
6304 WOODSIDE COURT  
COLUMBIA, MD 21046  
[Schedule an Appointment](#)  
[Get Directions](#) (<16mi)

3514 - Washington DC - Landover  
4301 Garden City Dr  
Suite 203-Metro 400  
Hyattsville, MD 20785  
[Schedule an Appointment](#)  
[Get Directions](#) (<27mi)

3512 - Washington DC - Bethesda  
[Schedule an Appointment](#)

Search Area: 200 | Unit: mi

- To select an appointment date and time, we recommend you select "Find available seats in a 3-month period" so that you have a broad selection of choices. Then click "Go". **You cannot schedule an examination more than 6 months in advance.**
- A calendar will appear and the days that are available will be underlined. Click on the day that you wish to test and a listing of available times for the selected date will appear at the right.
- Click on the desired time and then click "Next".

**NEW APPOINTMENT: DATE AND TIME SELECTION**

The appointment duration is 4-hour(s) and 00-minutes.

Select an available month and click the 'Go' button. When the calendar(s) appear, select an available date and then time.

Find available seats in a 3 month period.  
 Find available seats for a specific day.

June 2016 | Go

Select an available date

June 2016							July 2016							August 2016						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4						1	2	1	2	3	4	5	6	
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30	31			
												31								

Select an available time

10:00 AM

If the available dates and times are not suitable to your schedule, please choose a different month and click the 'Go' button or choose another Test Center that may offer more convenient appointment options.

< Back | Next >

Trusted Provider of Market Leading Test Development and Delivery Solutions  
Career Opportunities | Terms | Privacy | Ethics | © 2016 Prometric

- Complete the payment information screen then click “Next”.
- The “Appointment Complete” page will appear and you will receive an appointment confirmation email. From the “Appointment Complete” page you can print an appointment confirmation, print a receipt, or request a receipt via email.
- Review your appointment confirmation email immediately to confirm the correct exam part, date, time, and test center location was scheduled. Notify Prometric to make any corrections.

### Viewing Test History

From this section of the Candidate Account, you can view your examination history and test results from the previous two years and print an unofficial score report. **Test results will be available 24 hours after you create your account.**

- o Log into your account and click on **“Test History”**
- o To view or print an unofficial score report click the “Unofficial score report” link under the applicable exam name then click “Print”.

PROFILE LOG OUT

PROMETRIC

TESTS **TEST HISTORY** FIND ANOTHER TEST

Test History Do Not See Your Test Result?

**SEE PART 3 REPRESENTATION, PRACTICE & PROCEDURES**

Friday, November 06, 2015 7:00 AM  
Confirmation Number: 0000000090321326

**See your results: FAILED**  
[Unofficial score report](#)

More ▾

**SEE PART 1 INDIVIDUALS**

Tuesday, December 01, 2015 0:00 AM  
Confirmation Number: 0000000090322336

**See your results: Pending**

More ▾

**Notifications**  
Copies of notifications that Prometric sent to you

Trusted Provider of Market Leading Test Development and Delivery Solutions

[Career Opportunities](#) | [Terms](#) | [Privacy](#) | [Ethics](#) | [Site Status](#) | [Contact Us](#) | ©2015 Prometric