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](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”

**Action Required:** 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](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.
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.
**Scheduling an appointment**

To schedule a new appointment from the Candidate Dashboard:

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

- Read the Information Review and Privacy Policy Review pages (scroll down to see the entire 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 (if you have not been pre-approved select “no”) then click “Next”. Testing accommodations, such as adaptive equipment or a sign language interpreter, guarantees 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.
- 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”.
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 Dashboard, 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.**

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

![Test History Section](image.png)