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 (toll-free) or +1 443-751-4193 (toll), Monday through Friday, 8:00 a.m. to 9:00 p.m. Eastern time.
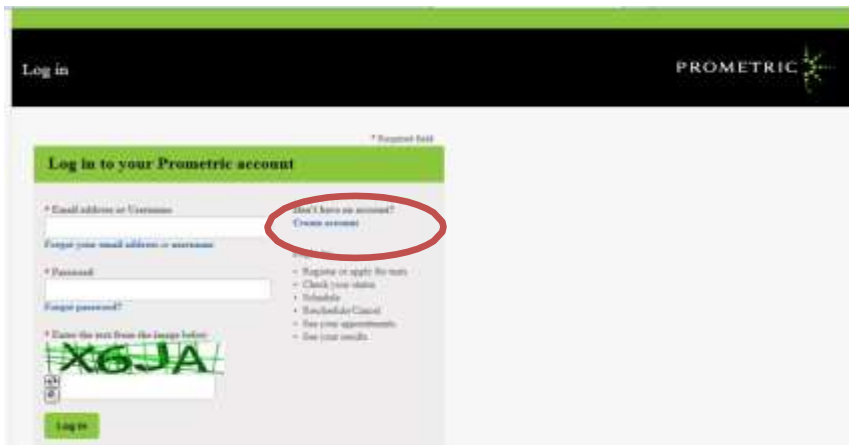
Creating a new CMS account or logging into an existing account

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

Visit https://www.prometric.com/SEE, and select "**Schedule**".

From the Log in page, click on "**Create Account"**

Provide the following information then click "Create account":
o   Username
o   Email Address
o   Confirm Email address
o   Password
o   Re-enter password
o   Check the box that you have read and agree to the Prometric Data Privacy Policy
o   Enter text from the image
o   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 Log in page.

B. Log into your account (existing users)

Visit https://www.prometric.com/SEE, and select "**Schedule**"
From the Log in page, enter your username or email address, password, and text from the image. Then click "Log in".
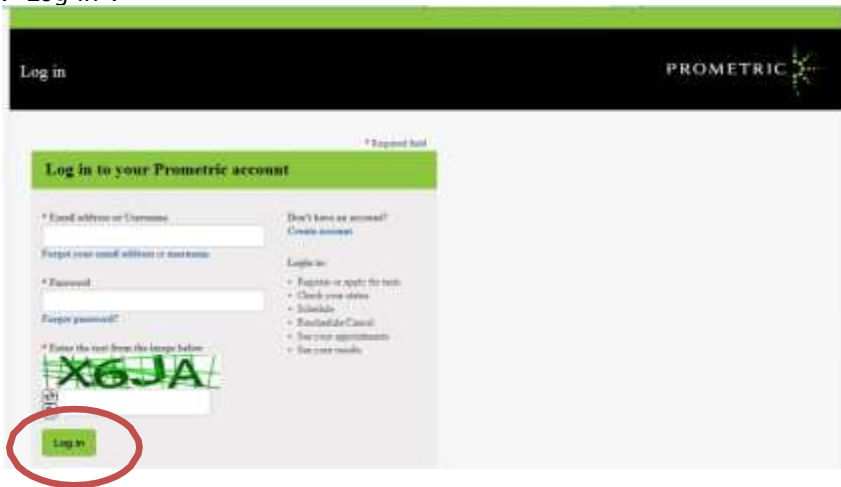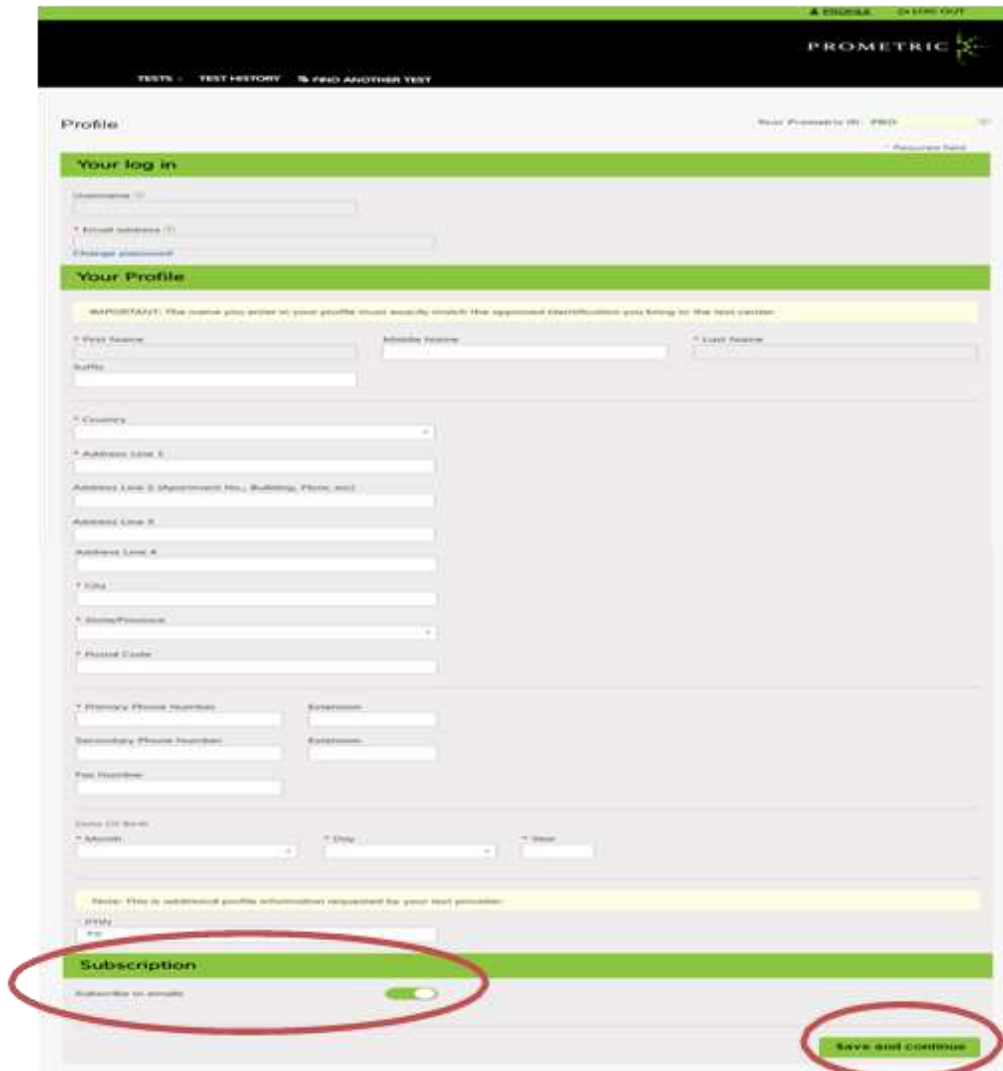
C. Update your profile

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

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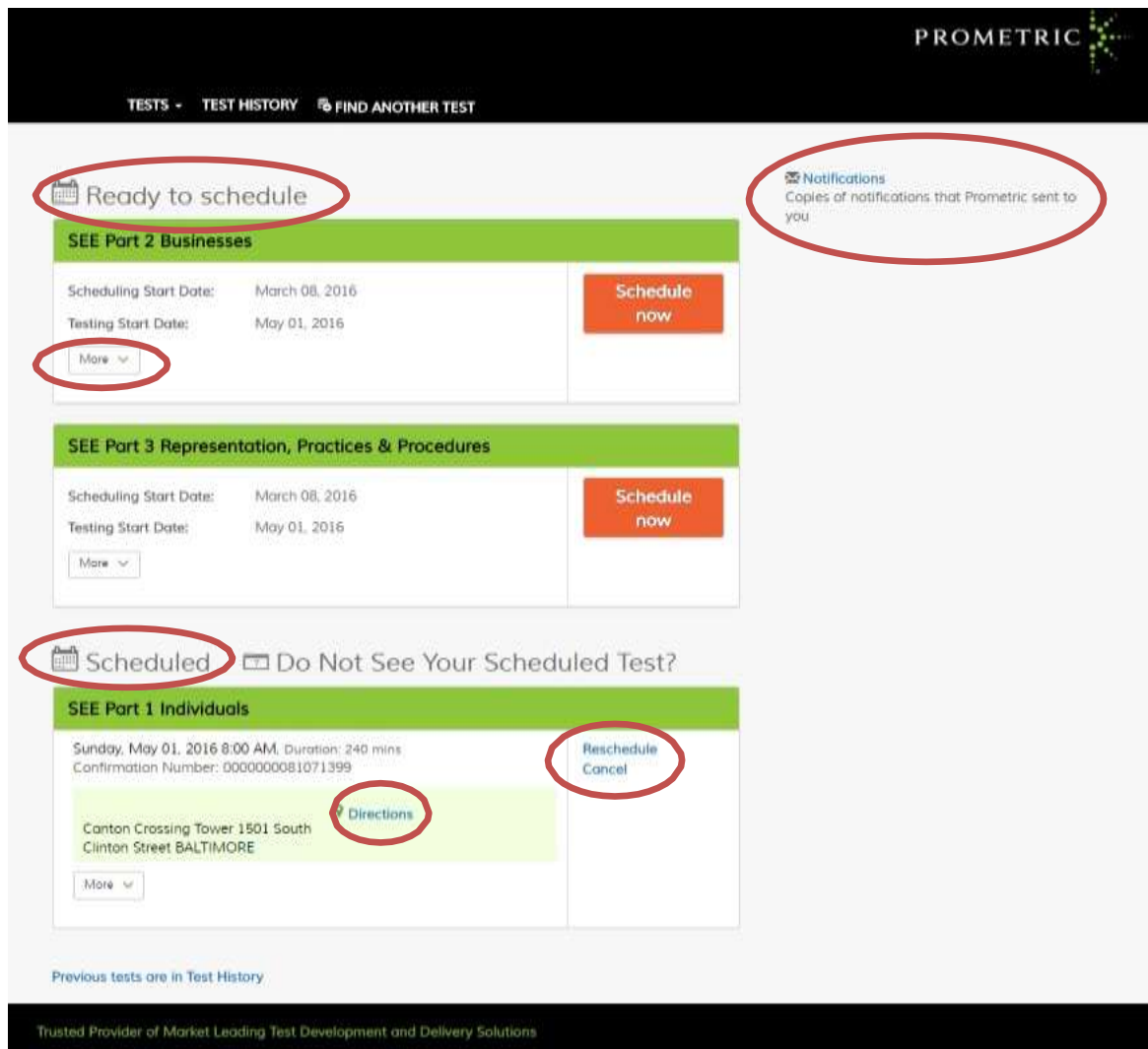

After providing your profile information, please review it for accuracy. You can access and update your profile page at any time by selecting "Profile" at the top of the webpage.

Note: once you have created your account, if you need to change your name, please call Prometric's customer service line at 1-800-306-3926 (toll-free) or +1 443-751-4193 (toll), Monday - Friday, 8:00 a.m. to 9:00 p.m. ET for assistance.

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.

- o 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.

- o 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 "Directions" link to obtain directions to the test center.

- o To request a replacement confirmation email, select "More" under the applicable appointment then click "Resend Confirmation email".

- o Click on the "Notifications" link in the upper right corner to view copies of prior email notifications from Prometric.

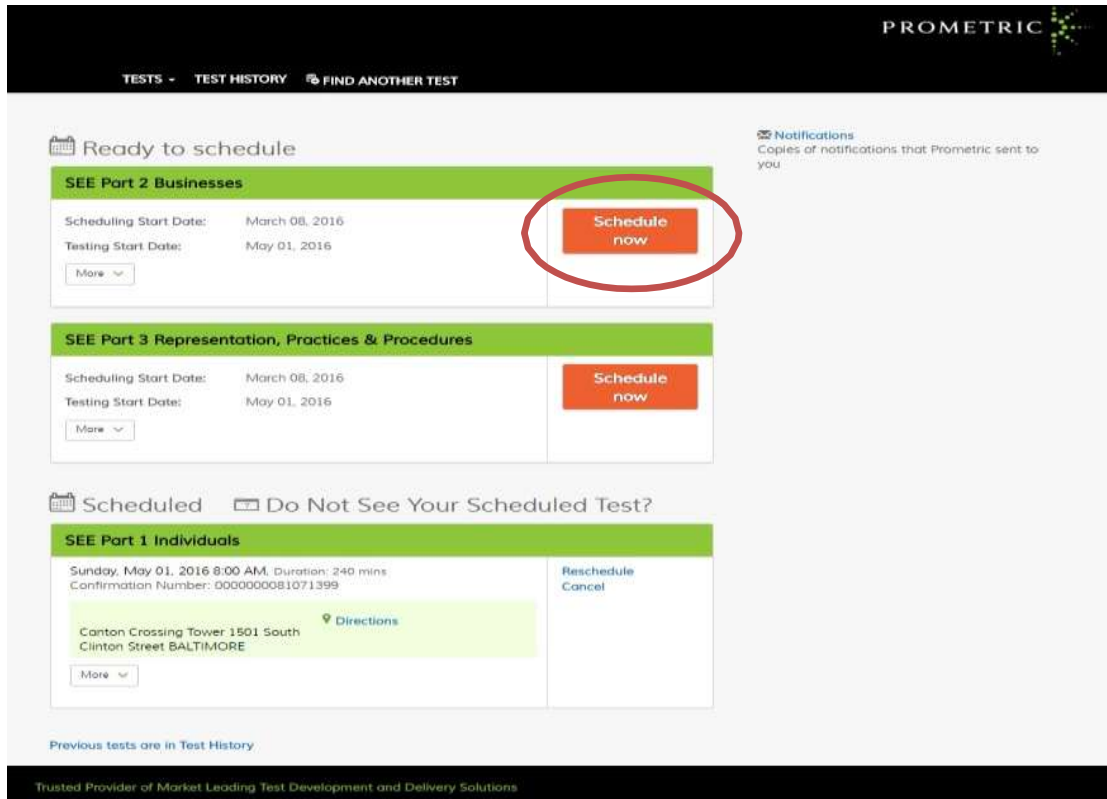- o See page 10 of this job aid for instructions to review your examination history.

Scheduling an appointment

To schedule a new appointment from the Candidate Dashboard:
- o   Click "Schedule now" next to the examination part you wish to schedule.


- o   Read the Enrolled Agent Special Enrollment Exam (SEE) Information page, then click the green forward button.

- o   Read the Policy Notice and Personal Data Privacy Disclosure & Consent Information page (scroll down to see the entire page). You must confirm that you are at least 18 years of age and consent to the collection and processing of personal data before you can continue. Once you have checked both boxes, click the green forward button.

- o   Pre-approved Testing Accommodations – **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 the green forward button.** 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.

On the "Find a Test Center" screen:

- o Verify the correct exam part is showing in the Test Selection field.
- o Enter the address, city or zip code where you would like to schedule your exam.
- o Enter start and end dates, then click green forward button.

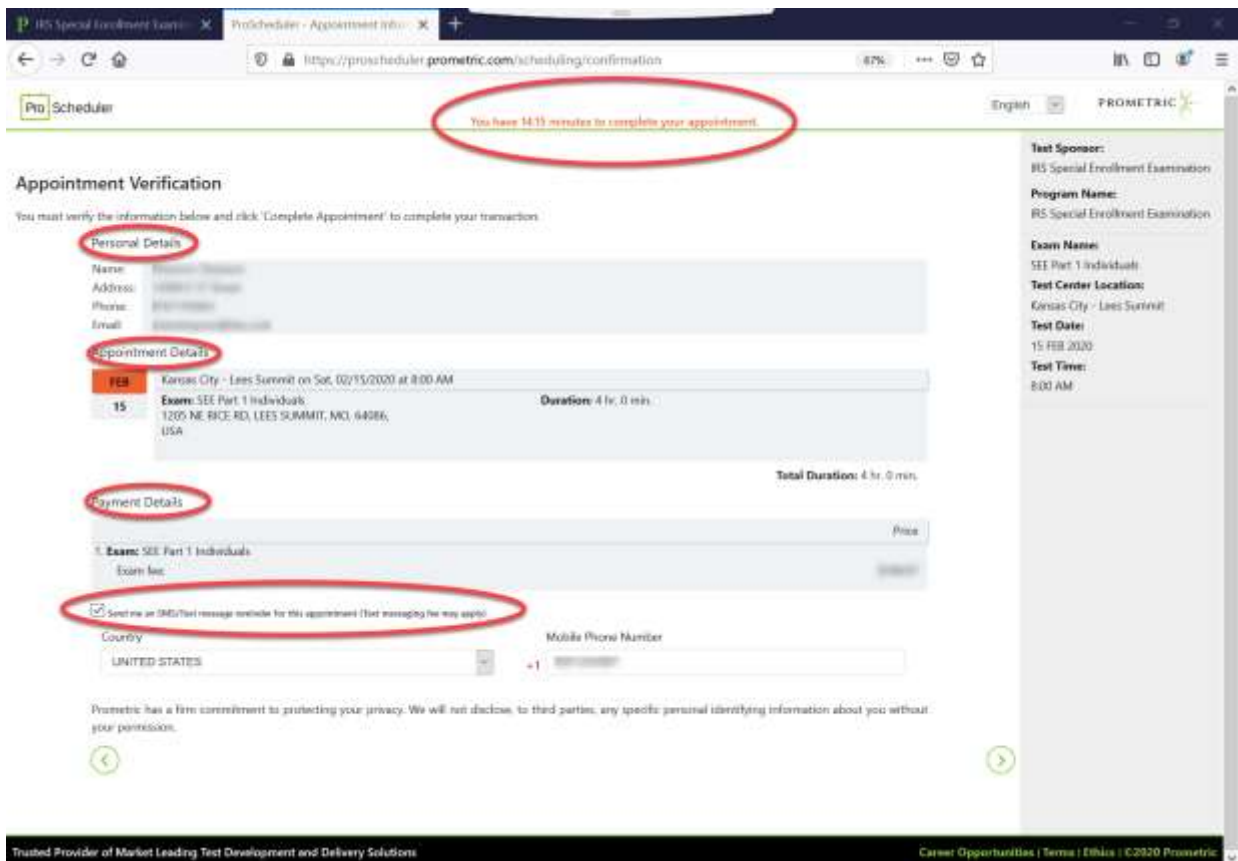 Note: You must select an end date that is within two weeks of the start date.

  You cannot schedule an examination more than 6 months in advance.
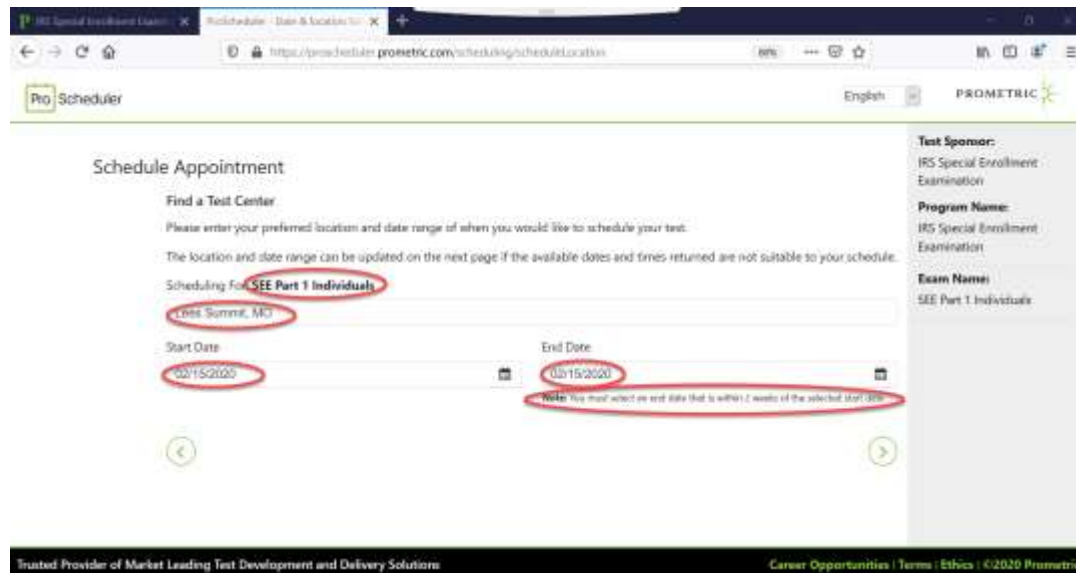
- o A listing of test center locations, with available dates, will appear on your screen.
- o Click on the date that you want to schedule your exam.
- o Once you select the date, click on the time that you want to schedule your exam.
- o Then click the green forward button.
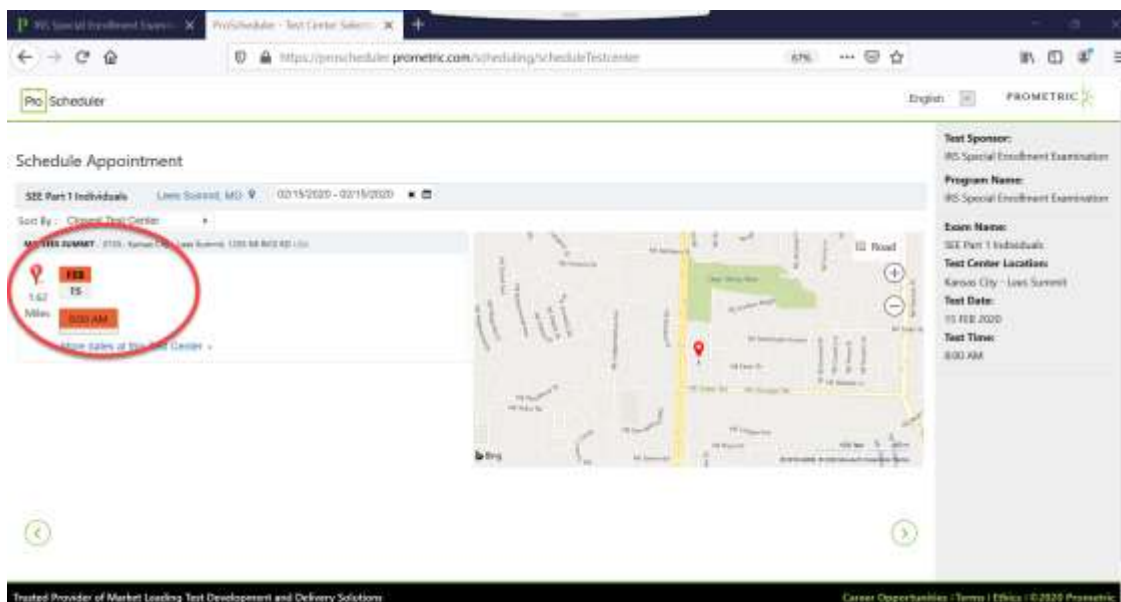
- o Verify all appointment information is correct:
  - Personal Details
  - Appointment Details
  - Payment Details (fee)
- o Check the box and enter your mobile telephone number, if you would like to receive a SMS/text message reminder about your scheduled exam. Note: Data rates may apply.
- o Click the green forward button

  Note: You have 15 minutes to schedule your exam. If time expires you will need to start the scheduling process from the beginning.

o   Complete the payment information screen, then click "Complete Appointment" button.
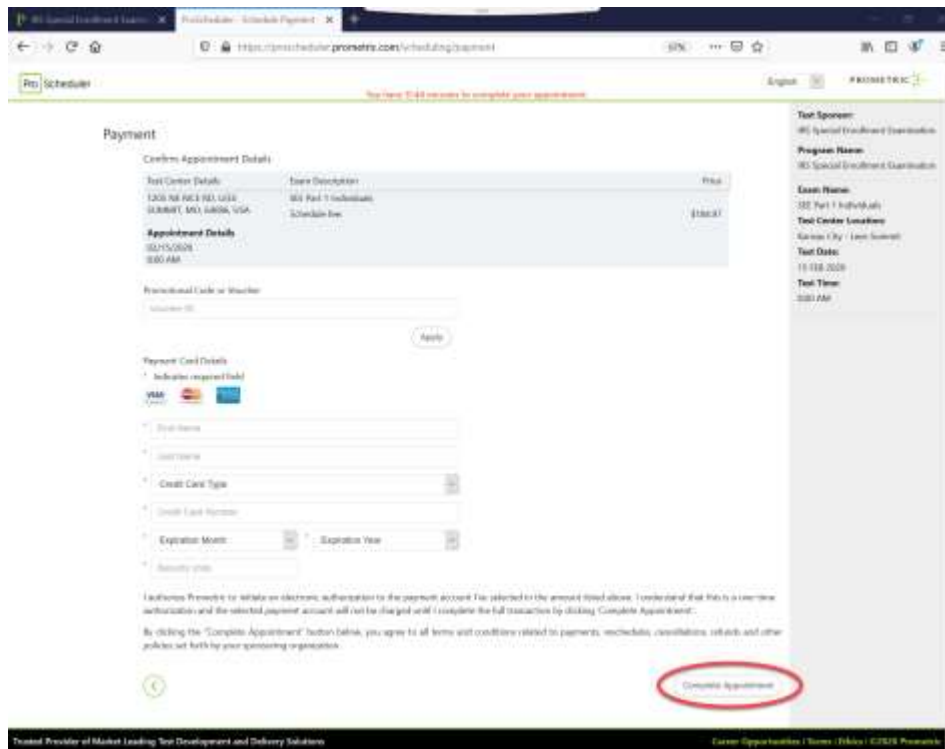
o   The "Appointment Summary" page will appear, and you will receive an appointment confirmation email. From this page you can print an appointment confirmation or print a receipt.
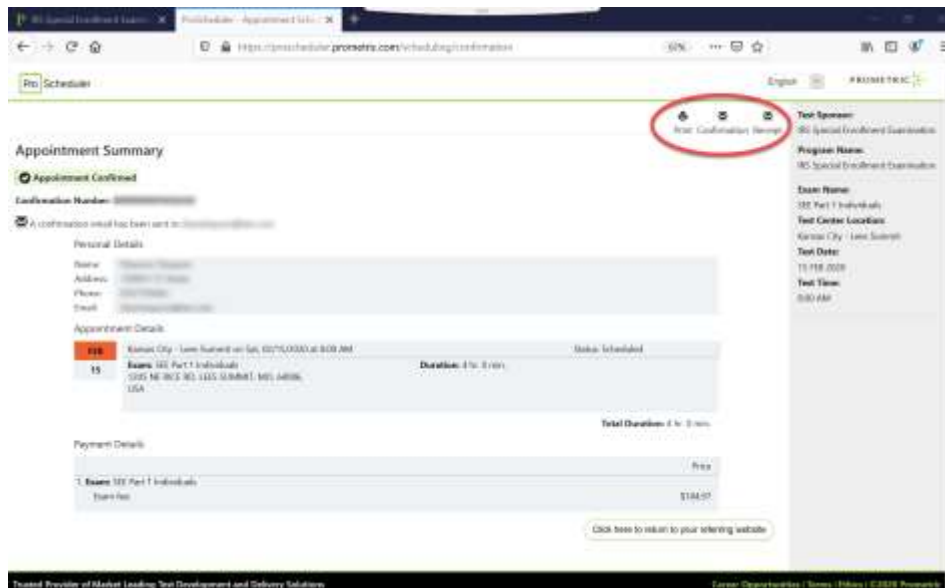

o   Review your appointment confirmation email immediately to confirm the correct exam part, date, time, and test center location was scheduled. Notify Prometric at 1-800-306-3926 (toll-free) or +1 443-751-4193 (toll), Monday through Friday, 8:00 a.m. to 9:00 p.m. Eastern Time to make any corrections.
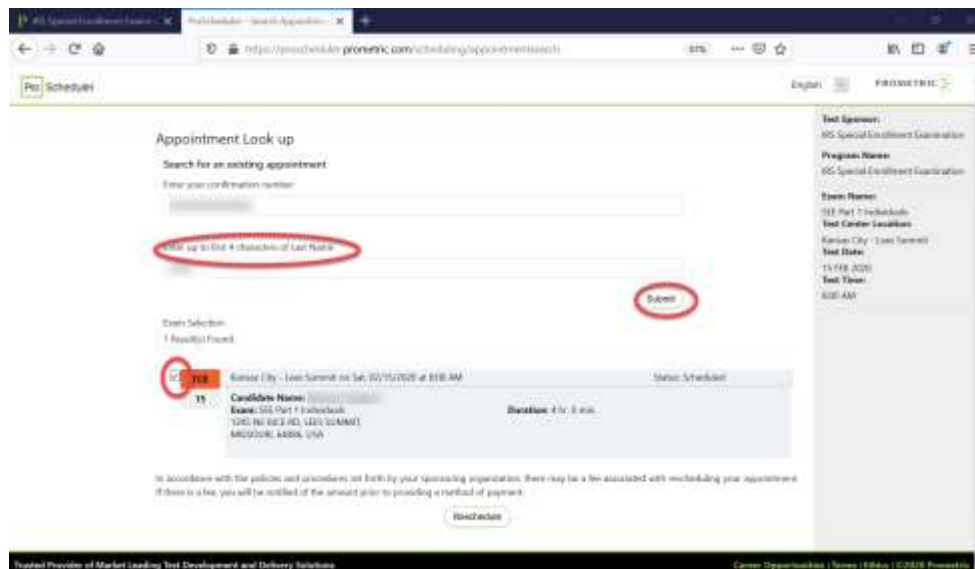
Rescheduling or Cancelling an Appointment

Go to www.prometric.com/SEE and click on the Reschedule/Cancel link, under Actions, on the left side of the screen.

- Log in to your account
- Examinations that have already been scheduled appear in the "Scheduled" section at the bottom of the screen. To reschedule or cancel the appointment, click on the "Reschedule" or "Cancel" link beside the examination name (the cancellation and rescheduling policy can be found in the Candidate Information Bulletin).
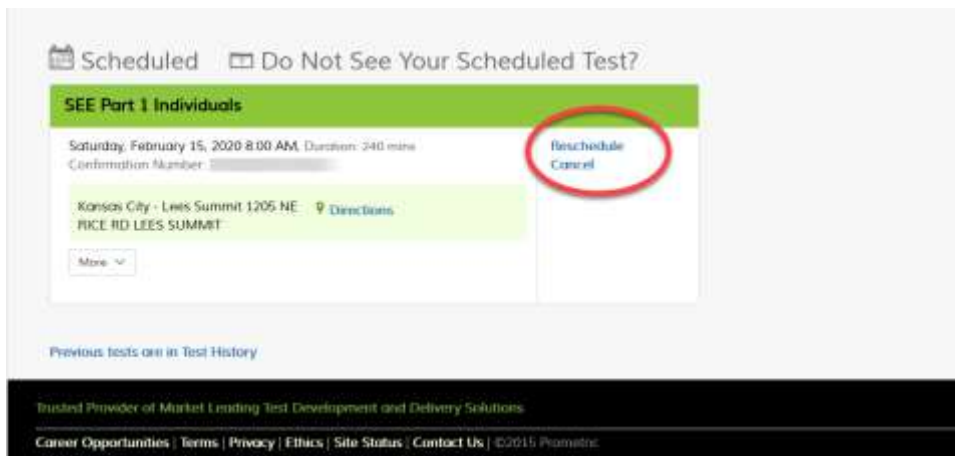
- Enter up to the first four characters of your last name and hit the "Submit" button.
- Click the checkbox next to the exam you want to reschedule or cancel.
- Click the "Reschedule" or "Cancel" button at the bottom of the screen.
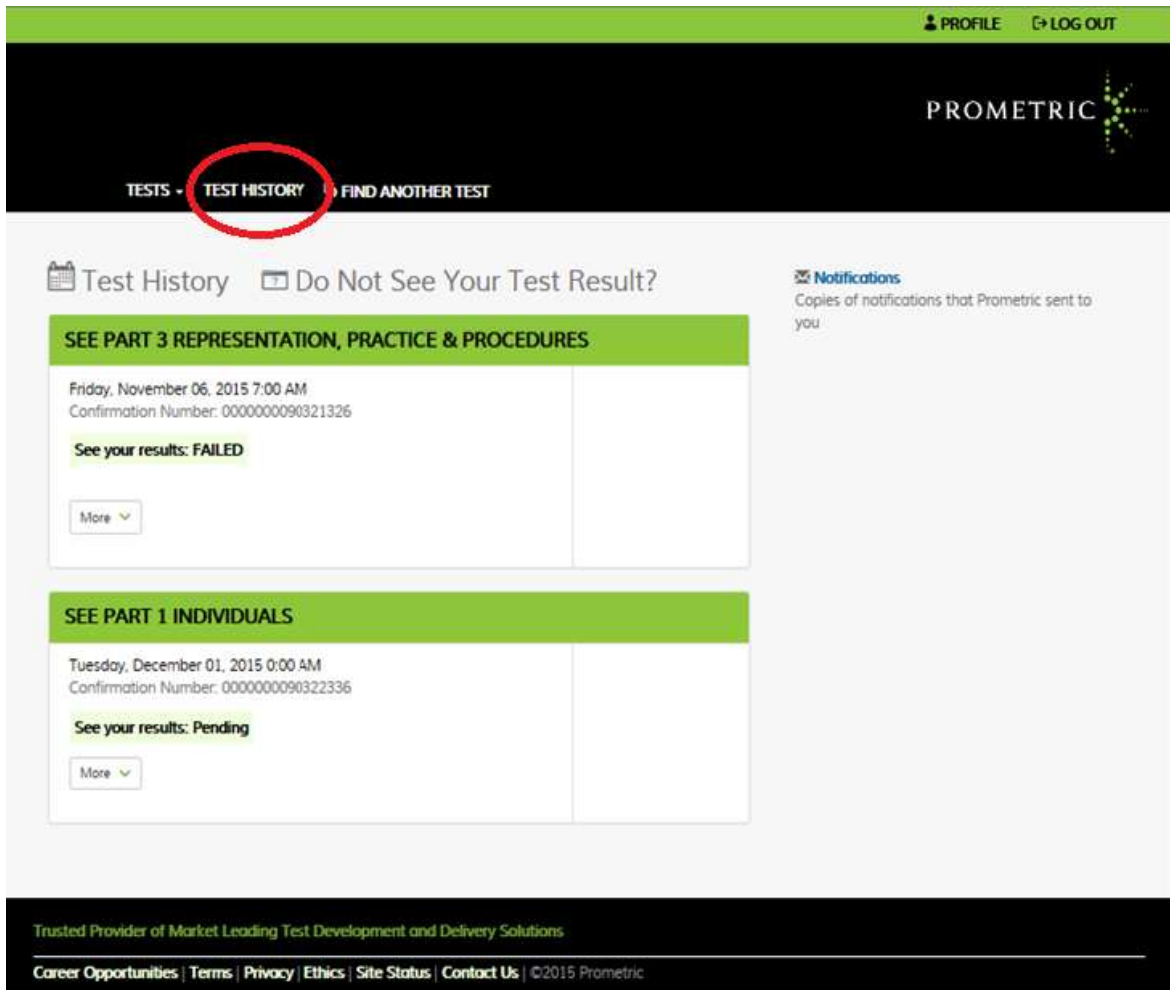

- **If rescheduling**, proceed to the select test center location, date, and appointment time that you want to reschedule your exam. Pay any fees, if applicable.
- **If cancelling**, review the information on the Cancellation Verification screen, and confirm you want to cancel by clicking the "Yes, I want to cancel my appointment" button.

Viewing Test History

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

o Log into your account and click on "**Test History**"