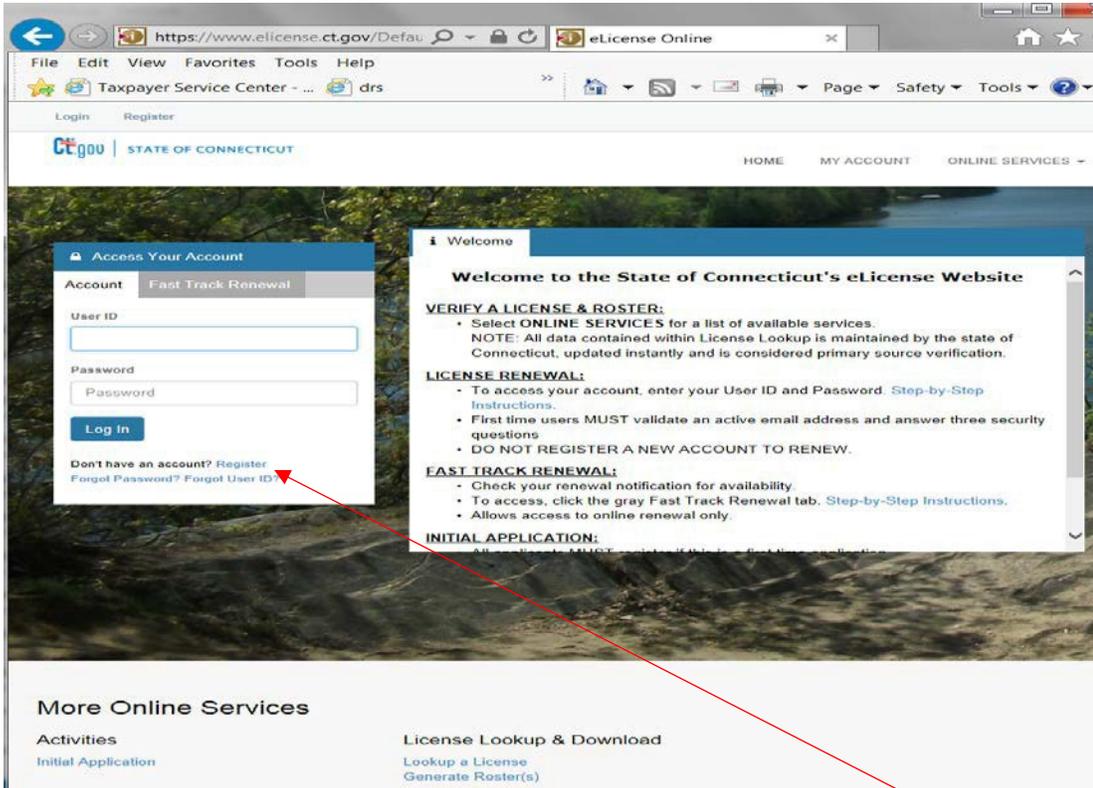


DRS e-license application

Paid Preparer/Facilitator

Once you determine that you are required to be registered with the Connecticut Department of Revenue (DRS), visit the e-license login at: <https://www.elicense.ct.gov>



If this is your first time to e-license, you must create an account by Clicking "Register"

If you have a User ID and password and need addition help, click on "Forgot Password" or "Forgot User ID" for help logging into your account

First time users will create an account and register in e-license:

Register as an individual, the Business does not need to register

Register new Account

Fields marked with an asterisk * are required.

Step 1. Business or Individual

Register as:

- Individual
- Business

PREVIOUS REGISTRATIONS **PLEASE READ**

- Previously registered accounts **will not be accessible** if registering a second account.
- You must use the User ID and Password linked to that registered account.
- Please contact the issuing agency below to request your User ID and Password.

Select Yes if the Individual or Business had prior Licensing interaction(s) with any of the following State agencies:

- Department of Public Health
- Department of Consumer Protection
- Department of Banking
- Department of Developmental Services
- Department of Agriculture
- Department of Revenue Services
- DOL Apprenticeship Training
- Secretary of the State Notary Unit
- Office of Early Childhood
- DEEP Pesticide or Forestry Programs
- DAS State Fire Marshal Office
- DAS State Marshal Commission

Select No if there are no previous registrations.

- Yes
- No

Next

Cancel

- 1) Create a unique User ID that you will remember.
- 2) Use an email that you have access to. All account emails will need to be validated prior to continuing.
- 3) Complete the person information including Name and address.
- 4) Complete the Secret Questions to help DRS identify you on future calls.
- 5) Enter the CAPTCHA verification code to prove you are not a computer.

Registration

Account Information

* denotes required fields

*User ID

*Email

*Password

Confirm Password
Passwords must match.

Personal Information

*First Name

Middle Name

*Last Name

| | |
|--|--|
| <h4>Public Address</h4> <p>Attention <input type="text" value="Attn."/></p> <p>Address <input type="text" value="123 Main St"/> <input type="text" value="Unit 2B"/></p> <p>City <input type="text" value="Hartford"/></p> <p>State <input type="text" value="Connecticut"/> <input type="button" value="v"/></p> <p>Country <input type="text" value="UNITED STATES"/> <input type="button" value="v"/></p> <p>Zip <input type="text" value="06106"/></p> <p>Phone Number <input type="text" value="2035551212"/></p> <p>Cell Phone <input type="text" value="8605551212"/></p> | <h4>Mailing Address</h4> <p><input checked="" type="checkbox"/> Same as Public Address</p> |
|--|--|

Secret Questions

| | | |
|-------------------|--|-------------------------------------|
| Secret Question 1 | <input type="text" value="What is the middle name of your oldest grandchild?"/> <input checked="" type="button" value="v"/> | <input type="text" value="samuel"/> |
| Secret Question 2 | <input type="text" value="What is the middle name of your youngest brother or sister?"/> <input checked="" type="button" value="v"/> | <input type="text" value="John"/> |
| Secret Question 3 | <input type="text" value="What was the destination of your first airplane trip?"/> <input checked="" type="button" value="v"/> | <input type="text" value="Texas"/> |

Captcha Verification

Please note that this code is case sensitive.



Enter Code*

6) Upon complete of your account, you will need to verify the email entered for your account.

User Account

In order to validate your account we have sent you a verification email to the address listed below. You must access your email account and click on the link provided. Once clicked you will be returned to your account and provided access.

⚠ There is currently 1 issue with your account.
Please resolve it before going further.

Your email address has not been verified. If you have not yet received an email to do this, please follow the instructions below.

| | | |
|----------------------------|--|---|
| User ID: | Preparer123 | Change User ID |
| E-mail: | joesmith@email.com Your account or new email address has not yet been verified. You have been sent a verification email by the system to your email address of record. You may have to check your SPAM filter. Click on the link provided in the email. Once clicked you will be returned to your account and provided access. If you have not yet received the email, you may click the below button labeled "Generate E-mail" and a new one will be sent to you. Please note: When you click the "Generate E-mail" button any older verification emails will be invalid. Ensure that you click the link in the most recently received email. | Change Email Generate E-mail |
| Password: | Change Password | |
| Security Questions: | Change Security Questions | |

7) You should receive an email in your account that you need to verify by selecting "Click here".

Search Inbox (Ctrl+E)

✉ ! 📄 From Subject

📅 Date: Today

📧 donotre... Email Verification

Email Verification
donotreply@po.state.ct.us
Sent: 10/12/2010 11:48 AM
To: donotre...

Dear [REDACTED],

This message is intended to verify the email address on file for you in the State of Connecticut's eLicensing website and to allow you to use the other online functionality.

To complete the process, please click the hyperlink below if it appears in your email program. If it does not appear as a hyperlink please read the instructions below.

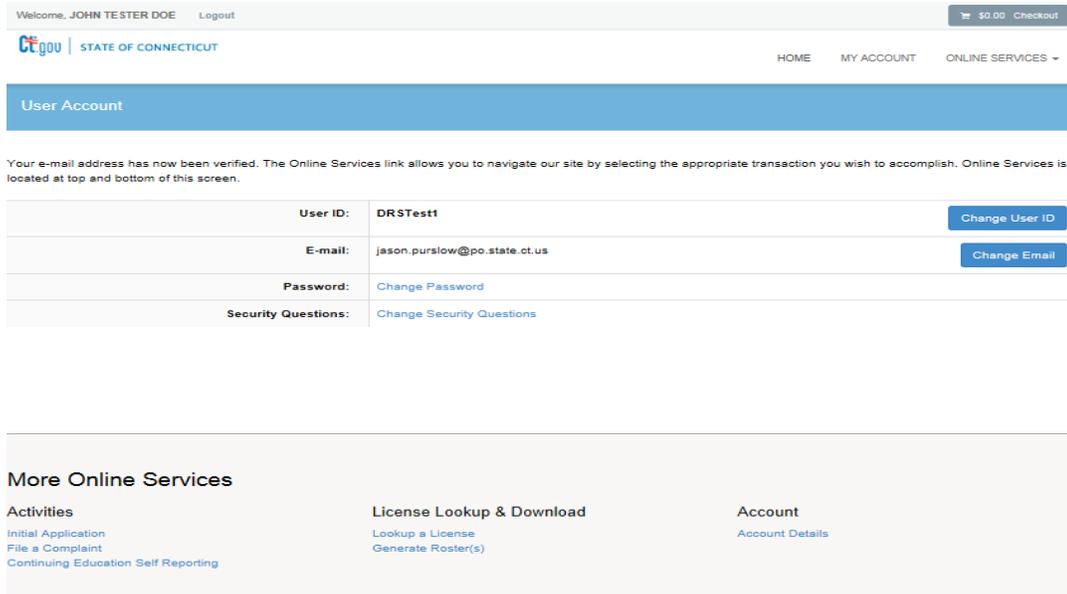
[Click here](#)

If a hyperlink does not appear above, then please copy the following text into your web browser's address bar (all the text below must be put in as a single line with no spaces)

[https://www.elicense.ct.gov/Account/VerifyEmail.aspx?guid=4c5cc01b-e0e7-43fa-ba0a-e5e712b4845a&email=\[REDACTED\]](https://www.elicense.ct.gov/Account/VerifyEmail.aspx?guid=4c5cc01b-e0e7-43fa-ba0a-e5e712b4845a&email=[REDACTED])

8) Once email is validated, taxpayer will see this screen where they can click 'Home'.

Make sure you make a note of the User ID and password for any future returning visit.



Welcome, JOHN TESTER DOE Logout \$0.00 Checkout

CT.gov | STATE OF CONNECTICUT HOME MY ACCOUNT ONLINE SERVICES

User Account

Your e-mail address has now been verified. The Online Services link allows you to navigate our site by selecting the appropriate transaction you wish to accomplish. Online Services is located at top and bottom of this screen.

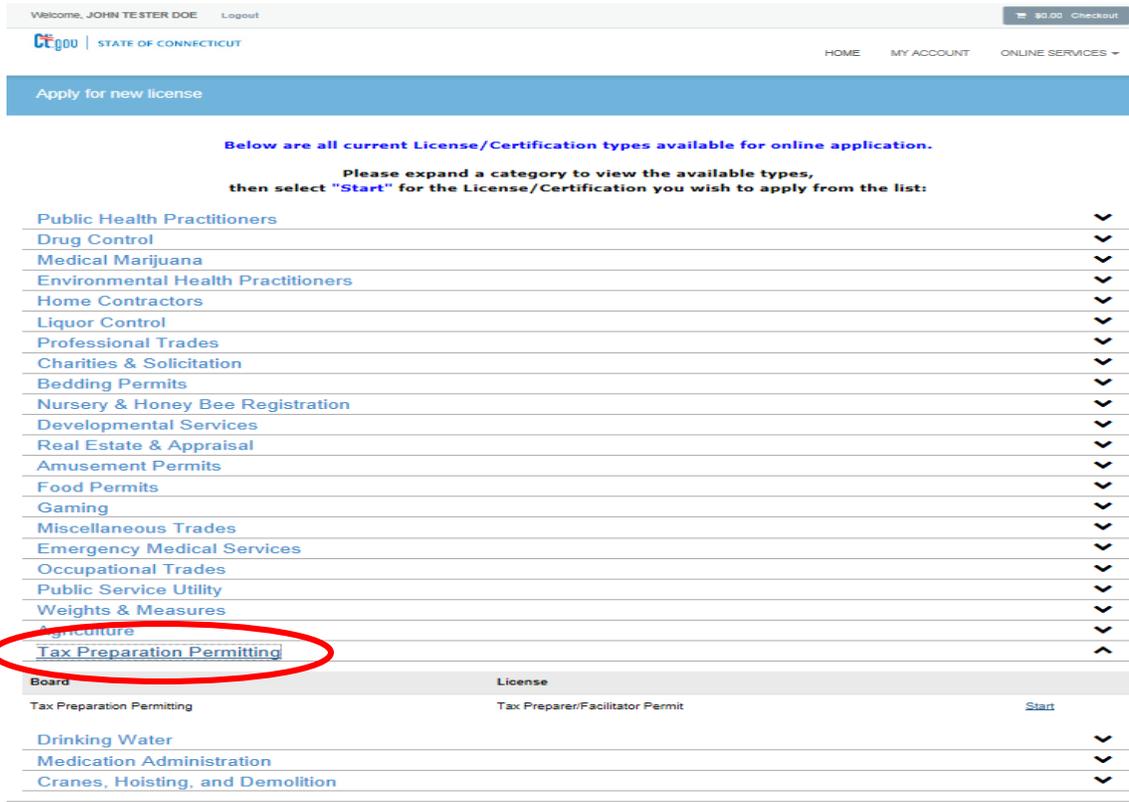
| | | |
|---------------------|---|--------------------------------|
| User ID: | DRSTestt | Change User ID |
| E-mail: | jason.purslow@po.state.ct.us | Change Email |
| Password: | Change Password | |
| Security Questions: | Change Security Questions | |

More Online Services

| | | |
|---|--|-----------------------------------|
| Activities Initial Application File a Complaint Continuing Education Self Reporting | License Lookup & Download Lookup a License Generate Roster(s) | Account Account Details |
|---|--|-----------------------------------|

9) Once logged in, click on "Initial Application" where a list is displayed.

10) Scroll down to the DRS "Tax Preparation Permitting".



Welcome, JOHN TESTER DOE Logout \$0.00 Checkout

CT.gov | STATE OF CONNECTICUT HOME MY ACCOUNT ONLINE SERVICES

Apply for new license

Below are all current License/Certification types available for online application.

Please expand a category to view the available types, then select "Start" for the License/Certification you wish to apply from the list:

- Public Health Practitioners
- Drug Control
- Medical Marijuana
- Environmental Health Practitioners
- Home Contractors
- Liquor Control
- Professional Trades
- Charities & Solicitation
- Bedding Permits
- Nursery & Honey Bee Registration
- Developmental Services
- Real Estate & Appraisal
- Amusement Permits
- Food Permits
- Gaming
- Miscellaneous Trades
- Emergency Medical Services
- Occupational Trades
- Public Service Utility
- Weights & Measures
- Agriculture
- Tax Preparation Permitting**
- Drinking Water
- Medication Administration
- Cranes, Hoisting, and Demolition

| Board | License | Start |
|----------------------------|---------------------------------|-------|
| Tax Preparation Permitting | Tax Preparer/Facilitator Permit | Start |

Application Step 1) Review the Start Instructions

Start Instructions

Welcome to the Department of Revenue Services online application system.

You must obtain a Paid Preparer/Facilitator permit from the Connecticut Department of Revenue Services if you engage in the business of, solicit business as, or advertise as offering services as a tax preparer or facilitator of refund anticipation loans (RAL) or refund anticipation checks (RACs).

To determine if you are required to obtain a tax preparer/facilitator permit, Click [here](#) to verify.

You will need to complete all questions within the application to submit your application.

All applicable fees must be paid at the completion of the application.

The Application fee once submitted is non-refundable.

The e-license application accepts payments via Credit Card or Check Draft (ACH Debit):

1. Credit Card Payments: We accept Visa, MasterCard, Discover, and American Express
2. Check Draft (ACH Debit Payments):

- If your account has a debit block, you must authorize the Paid Preparer e-license Company ID. (A debit block means your bank rejects all debit requests unless a specific 'debit block code' is provided.)
- To authorize payment, please contact your financial institution and request that the following Company ID be added to your list of approved companies: 6060007984

You will be notified via email once your application has been successfully processed and entered into our licensing system for review. Once application has been approved, an official permit will be attached to a future email notification.

The Permit fee for a first time application is \$100 and is good for a period of 2 years.

The Permit fee for a renewal application is \$50 and is good for a period of 2 years.

If you are ready to proceed with your online application, click **NEXT** at the bottom.

Application Step 2) Verify and update address as needed

Tax Preparer/Facilitator Permit

Start Instructions

Address Update

Address Update

1. Please update any changes to your primary address:

Address 1: 450 Columbus Blvd
Address 2: Suite B
City: Hartford State: Connecticut Zip Code: 06103 Country: UNITED STATES
Telephone Number: (860) 555-1212

[Edit Address](#)

-- OR --Change to an address already on file:
[450 Columbus Blvd Suite B Hartford, CT 06103 \(UNITED STATES\)](#) [Update](#)

2. Please update any changes to your mailing address:

Address 1: 450 Columbus Blvd
Address 2: Suite B
City: Hartford State: Connecticut Zip Code: 06103 Country: UNITED STATES

[Edit Address](#)

-- OR --Change to an address already on file:
[450 Columbus Blvd Suite B Hartford, CT 06103 \(UNITED STATES\)](#) [Update](#)

[Previous](#) [Next](#) [Close and Save](#)

Application Step 3 and 4) Enter your Social Security Number (SSN) and Preparer Tax Identification Number (PTIN)

PTIN help: The PTIN is assigned by the Internal Revenue Service (IRS) and is 9 positions in length. The format of the PTIN begins with the letter 'P' and is followed by 8 digits.

The screenshot shows a web application window titled "Tax Preparer/Facilitator Permit". On the left is a navigation sidebar with three items: "Start Instructions", "Address Update", and "SSN/PTIN". The "SSN/PTIN" item is highlighted. The main content area has a blue header "SSN/PTIN" and a sub-header "Fields marked with an asterisk * are required." Below this, there are two sections:

- 3. Social Security Number: (no dashes)**
 - * Enter your SSN: [.....]
 - * Re-enter your SSN: [.....]
- 4. Please enter your Preparers Tax Identification number (PTIN):** ⓘ
 - * P12345678

At the bottom of the form are three buttons: "Previous", "Next", and "Close and Save".

Application Step 5) Are you an Authorized Paid preparer in another State?

Only certain states currently have a registration process of a paid preparer. If you are currently registered in one or more of those other states, select 'yes' to this question.

The screenshot shows the same "Tax Preparer/Facilitator Permit" application window, now on Step 5. The sidebar has "Other State?" selected. The main content area has a blue header "Other State?" and a sub-header "Fields marked with an asterisk * are required." Below this is a single question:

- 5. Are you authorized to act as a Tax Preparer or Facilitator in another state?** ⓘ
 - * Yes No

At the bottom of the form are three buttons: "Previous", "Next", and "Close and Save".

Application Step 6) If Yes is answered at Application Step 5

Indicate the State(s) you are currently approved to provide tax preparation services

Fields marked with an asterisk * are required.

6. Select the other state in which you are approved and registered for tax preparation services.

Move Items from one List to the other

| Available | Selected |
|---|------------|
| Military Europe, Middle East: AE Alaska Alabama Military Pacific: AP Arkansas Arizona Colorado Connecticut District of Columbia | California |

OK

Tax Preparer/Facilitator Permit

DRS-Other State Registration

Fields marked with an asterisk * are required.

6. Select the other state in which you are approved and registered for tax preparation services.

* California

- Start Instructions
- Address Update
- SSN/PTIN
- Other State?
- DRS-Other State Registration

Application Step 7) Age

You must be at least 18 years old to apply for a Paid Preparer/Facilitator permit.

If you are not 18, e-license will not allow you to file a Tax Preparer Permit.

Tax Preparer/Facilitator Permit

Age

Fields marked with an asterisk * are required.

7. Are you 18 years or older?

* Yes No

Previous Next

- Start Instructions
- Address Update
- SSN/PTIN
- Other State?
- DRS-Other State Registration
- Age

Application Step 8) Education

You must have completed high school or its equivalent to apply for a Paid Preparer/facilitator permit.

The screenshot shows a web application window titled "Tax Preparer/Facilitator Permit". On the left is a vertical navigation menu with options: Start Instructions, Address Update, SSN/PTIN, Other State?, DRS-Other State Registration, Age, and Education. The "Education" option is selected and highlighted. The main content area is titled "Education" and contains the text "Fields marked with an asterisk * are required." followed by question 8: "8. Have you successfully completed high school or the equivalent?" with a help icon. Below the question is a radio button labeled "Yes" and another labeled "No", with an asterisk to the left of the "Yes" option. At the bottom of the form are "Previous" and "Next" buttons, and a red "Close and Save" button.

Application Step 9) Training

You must have prior experience or education in the area of tax preparation to apply for a Paid Preparer/Facilitator permit.

The screenshot shows a web application window titled "Tax Preparer/Facilitator Permit". On the left is a vertical navigation menu with options: Start Instructions, Address Update, SSN/PTIN, Other State?, DRS-Other State Registration, Age, Education, and Training. The "Training" option is selected and highlighted. The main content area is titled "Training" and contains the text "Fields marked with an asterisk * are required." followed by question 9: "9. Do you have training/education in tax preparation?" with a help icon. Below the question is a radio button labeled "Yes" and another labeled "No", with an asterisk to the left of the "Yes" option. At the bottom of the form are "Previous" and "Next" buttons, and a red "Close and Save" button.

Application Step 10) IRS Discipline question

If you have been disciplined by the Internal Revenue Service, you must answer yes to this question

The screenshot shows a web application window titled "Tax Preparer/Facilitator Permit". On the left is a vertical sidebar with menu items: "Address Update", "SSN/PTIN", "Other State?", "DRS-Other State Registration", "Age", "Education", "Training", "IRS Discipline", and "IRS Eligible". The "IRS Discipline" item is selected and highlighted. The main content area has a blue header "IRS Discipline" and a sub-header "Fields marked with an asterisk * are required." Below this is question 10: "10. Have you ever been disciplined by the IRS?" with a help icon. The question is marked with an asterisk. There are two radio button options: "Yes" (which is selected) and "No". At the bottom of the form, there are three buttons: "Previous", "Next", and "Close and Save".

Application Step 11) IRS Eligible- If step 10 was answered with a yes and you were previously disciplined by the IRS

You must be eligible to submit returns to the IRS to apply to become a Paid Preparer/Facilitator in Connecticut.

The screenshot shows the same web application window, now on Step 11: "IRS Eligible". The sidebar menu is the same, but "IRS Eligible" is now selected and highlighted. The main content area has a blue header "IRS Eligible" and a sub-header "Fields marked with an asterisk * are required." Below this is question 11: "11. Are you currently eligible to submit returns to the IRS?" with a help icon. The question is marked with an asterisk. There are two radio button options: "Yes" and "No", neither of which is selected. At the bottom of the form, there are three buttons: "Previous", "Next", and "Close and Save".

Application Step 12) Select Services

Please select if you are a Paid Preparer, a Facilitator or you provide both services.

Tax Preparer/Facilitator Permit

Update

SSN/PTIN

Other State?

DRS-Other State Registration

Age

Education

Training

IRS Discipline

IRS Eligible

Select Services

Select Services

Fields marked with an asterisk * are required.

12. Please select which service(s) you provide:

A Paid tax preparer is a(n)-

- Individual that prepares at least 10 Connecticut state Income tax returns for a fee or other consideration;
- employee of tax return preparation business who prepares at least 10 Connecticut Income tax returns
- employee of a tax preparer or facilitator holding a permit issued by Connecticut Department of Revenue Services

A facilitator is a person who individually or with someone else:

- solicits the execution of, processes, receives, or accepts an application or agreement for a refund anticipation loan (RAL) or refund anticipation check (RAC);
- serves or collects on a RAL or RAC; or
- facilitates making a RAL or RAC.

You must select 1 option below. ?

Paid Preparer

* Facilitator

Both a Paid Preparer and Facilitator

Previous Next Close and Save

Application Step 13) Declaration

You must agree to the terms and conditions of this declaration in order to proceed.

Tax Preparer/Facilitator Permit

SSN/PTIN

Other State?

DRS-Other State Registration

Age

Education

Training

IRS Discipline

IRS Eligible

Select Services

Declaration

Declaration

Fields marked with an asterisk * are required.

13. I declare under penalty of law that I have examined this application and to the best of my knowledge and belief, it is true, complete, and correct. I understand that making a material misrepresentation of fact on this application is punishable by a fine of not more than \$500.

If any of the contact information you included in this application changes, you must return to this account and update it with DRS.

Do you agree to these terms and conditions? ?

* Yes No

Previous Next Close and Save

Application Step 14) Review

This is your final opportunity to validate the data you entered is complete and correct.

Tax Preparer/Facilitator Permit

Review Print Review

Fees

| | |
|---------------------|-----------------|
| New application fee | \$100.00 |
| Total Fees: | \$100.00 |

Start Instructions

IMPORTANT: You are registering to be a Tax Preparer/Facilitator.
Any fee collected is non-refundable.

Please review the information below to ensure it is accurate. Fix anything that needs to be updated.

If all information appears to be complete and accurate, complete the transaction by selecting "add to invoice" where you will be taken to "Pay Invoice" and initiate the required payment and complete the filing.

Your application is not submitted until you receive your confirmation of receipt through the e-licensing application.

Address Update

1. Please update any changes to your primary address:

| | | | | | | | |
|------------|-------------------|--------|----------|-------------------|----------------|----------|---------------|
| Address 1: | 450 Columbus Blvd | State: | CT | Zip Code: | 06103 | Country: | UNITED STATES |
| Address 2: | Suite B | City: | Hartford | Telephone Number: | (860) 555-1212 | | |

2. Please update any changes to your mailing address:

| | | | | | | | |
|------------|-------------------|--------|----------|-----------|-------|----------|---------------|
| Address 1: | 450 Columbus Blvd | State: | CT | Zip Code: | 06103 | Country: | UNITED STATES |
| Address 2: | Suite B | City: | Hartford | | | | |

SSN/PTIN

3. Social Security Number: (no dashes)

Enter: *****
Re-enter:*****

4. Please enter your Preparers Tax Identification number (PTIN): ?
P11234567

Other State?

5. Are you authorized to act as a Tax Preparer or Facilitator in another state? ?
Yes

DRS-Other State Registration

6. Select the other state in which you are approved and registered for tax preparation services.
California

Age

7. Are you 18 years or older? ?
Yes

Education

8. Have you successfully completed high school or the equivalent? ?
Yes

Training

9. Do you have training/education in tax preparation? ?
Yes

IRS Discipline

10. Have you ever been disciplined by the IRS? ?
Yes

IRS Eligible

11. Are you currently eligible to submit returns to the IRS? ?
Yes

Select Services

12. Please select which service(s) you provide:

A Paid tax preparer is a(n)-

- individual that prepares at least 10 Connecticut state income tax returns for a fee or other consideration;
- employee of tax return preparation business who prepares at least 10 Connecticut income tax returns
- employee of a tax preparer or facilitator holding a permit issued by Connecticut Department of Revenue Services

A facilitator is a person who individually or with someone else:

- solicits the execution of, processes, receives, or accepts an application or agreement for a refund anticipation loan (RAL) or refund anticipation check (RAC);
- serves or collects on a RAL or RAC; or
- facilitates making a RAL or RAC.

You must select 1 option below. ?
Paid Preparer

Declaration

13. I declare under penalty of law that I have examined this application and to the best of my knowledge and belief, it is true, complete, and correct. I understand that making a material misrepresentation of fact on this application is punishable by a fine of not more than \$500.

If any of the contact information you included in this application changes, you must return to this account and update it with DRS.

If all information is true, complete and accurate, click "Add to Invoice" and then continue on to "pay invoice". Your filing is not complete until you pay your invoice in full and receive a confirmation of filing.

Do you agree to these terms and conditions? ?
Yes

Previous Add to Invoice Close and Save

Application Step 15) Add to Invoice

Once you have selected 'Add to invoice" you will be taken to your 'cart'

Welcome, JOHN TESTER DOE Logout \$100.00 Checkout

CT.gov | STATE OF CONNECTICUT HOME MY ACCOUNT ONLINE SERVICES

Invoice [Pay Invoice](#) [Print](#)

This item was successfully added to the invoice

Select **Pay Invoice** above to complete this transaction. To add additional transactions to the invoice, select a command from the Online Services menu.

State of Connecticut
Online Enterprise
eLicense Site

Invoice Date: 8/29/2018
Invoice # 1896031

JOHN TESTER DOE
450 Columbus Blvd
Suite B
Hartford, CT 06103

| Description | Amount |
|--|----------|
| Application - Tax Preparer/Facilitator Permit | |
| New application fee | \$100.00 |
| Subtotal: | \$100.00 |
| Total: | \$100.00 |

[Pay Invoice](#)

Application Step 16) Pay Invoice to complete filing

Pay your \$100 permit fee by credit card. **This application only accepts Visa, MasterCard, Discover and American Express.**

Invoice Payment [Back to Invoice](#)

Total: \$100.00



Credit Card Instructions:
*Where is CVV code?

Check Draft Instructions:
*Where is Account & Routing #?

**** Payment Type** Credit Card Check Draft

**** Account Owner**

**** Credit Card Type**

**** Card Number**

**** Expiration Month / Year**

**** CVV Code**

**** First Name** JOE

**** Last Name** SMITH

Company Name

Attention

**** Address** 123 Main St

Address

**** City** Hartford

**** State** Connecticut

**** Zip** 06106

**** Country** UNITED STATES

**** Phone** 2035551212

**** E-mail Address** joe.smith@ct.gov

Note: This email is used for sending a copy of your receipt.

[Submit Payment](#)