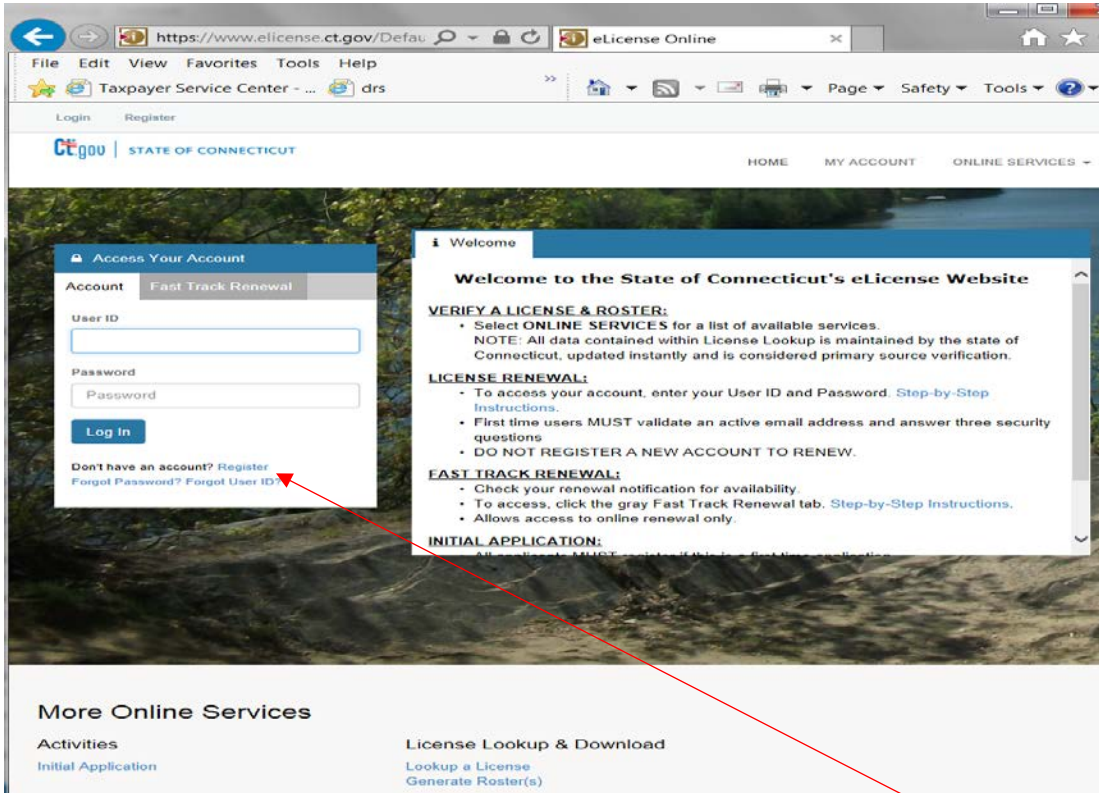


## DRS e-license application

### 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

**Note: Register as the Individual or Business to whom the credential will be issued.**

**\*\*PLEASE READ\*\***

- You will not be able to renew or access information for an existing license if you register a new account.
- You must use the User ID and Password linked to that account.
- Please contact the issuing agency below to request your User ID and Password.

**Has the Individual or Business ever had any prior Licensing interaction(s) with any of the following State agencies:**

- Department of Public Health
- Department of Agriculture
- Office of Early Childhood
- Department of Revenue Services
- Department of Consumer Protection
- Department of Developmental Services
- Office of the State Fire Marshal
- Department of Transportation

**\*\*If unsure, then first do an [Online Lookup](#) search under the **ONLINE SERVICES** menu.**

Yes  
 No

- 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

---

#### Public Address

Attention

Address

City

State

Country

Zip

Phone Number

Cell Phone

#### Mailing Address

Same as Public Address

---

#### Secret Questions

Secret Question 1


Secret Question 2

Secret Question 3

---

#### 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.

<b>User ID:</b>	Preparer123	<a href="#">Change User ID</a>
<b>E-mail:</b>	joel.smith@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.	<a href="#">Change Email</a>  <a href="#">Generate E-mail</a>
<b>Password:</b>	<a href="#">Change Password</a>	
<b>Security Questions:</b>	<a href="#">Change Security Questions</a>	

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

Search Inbox (Ctrl+E)

From	Subject
donotre...	Email Verification

**Email Verification**  
donotreply@po.state.ct.us  
Sent: 10/12/2010 10:48:00 AM  
To: [redacted]

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:	DRSTest1	<a href="#">Change User ID</a>
E-mail:	jason.purslow@po.state.ct.us	<a href="#">Change Email</a>
Password:	<a href="#">Change Password</a>	
Security Questions:	<a href="#">Change Security Questions</a>	

### More Online Services

<b>Activities</b> <a href="#">Initial Application</a> <a href="#">File a Complaint</a> <a href="#">Continuing Education Self Reporting</a>	<b>License Lookup &amp; Download</b> <a href="#">Lookup a License</a> <a href="#">Generate Roster(s)</a>	<b>Account</b> <a href="#">Account Details</a>
---	--	---

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**

Board	License	
Tax Preparation Permitting	Tax Preparer/Facilitator Permit	<a href="#">Start</a>

- Drinking Water
- Medication Administration
- Cranes, Hoisting, and Demolition

## Application Step 1) Review the Start Instructions

### Tax Preparer/Facilitator Permit

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 only acceptable payment type at this time is by use of a credit card. This application only accepts Visa, MasterCard, Discover and American Express.

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.

Previous Next Close and Save

## Application Step 2) Verify and update address as needed

### Tax Preparer/Facilitator Permit

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 vertical navigation menu with three items: "Start Instructions", "Address Update", and "SSN/PTIN", which is currently selected. 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: A text input field containing nine dots.
  - \* Re-enter your SSN: A text input field containing nine dots.
- 4. Please enter your Preparers Tax Identification number (PTIN):** (with a help icon)
  - \* P12345678: A text input field containing the text "P12345678".

At the bottom of the form, there 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 web application window, now on Step 5. The navigation menu 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, there is one question:

- 5. Are you authorized to act as a Tax Preparer or Facilitator in another state?** (with a help icon)
  - \*  Yes  No

At the bottom of the form, there 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 to 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 the following items: "Start Instructions", "Address Update", "SSN/PTIN", "Other State?", "DRS-Other State Registration", "Age", and "Education". The "Education" item is 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?". Below the question are two radio button options: "Yes" and "No", with an asterisk (\*) placed to the left of the "Yes" option. At the bottom of the form are three buttons: "Previous", "Next", and "Close and Save".

## 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 the following items: "Start Instructions", "Address Update", "SSN/PTIN", "Other State?", "DRS-Other State Registration", "Age", "Education", and "Training". The "Training" item is 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?". Below the question are two radio button options: "Yes" and "No", with an asterisk (\*) placed to the left of the "Yes" option. At the bottom of the form are three buttons: "Previous", "Next", and "Close and Save".

Application Step 10) IRS Discipline question

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

**Tax Preparer/Facilitator Permit**

**IRS Discipline**

Fields marked with an asterisk \* are required.

10. Have you ever been disciplined by the IRS? [?](#)

\*  Yes  No

Previous Next 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.

**Tax Preparer/Facilitator Permit**

**IRS Eligible**

Fields marked with an asterisk \* are required.

11. Are you currently eligible to submit returns to the IRS? [?](#)

\*  Yes  No

Previous Next 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
<b>Total Fees:</b>	<b>\$100.00</b>

---

**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  
Address 2: Suite B  
City: Hartford State: CT Zip Code: 06103 Country: UNITED STATES  
Telephone Number: (860) 555-1212

2. Please update any changes to your mailing address:

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

---

**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'

The screenshot shows the 'Invoice' page on the State of Connecticut's online services portal. At the top, there is a navigation bar with 'HOME', 'MY ACCOUNT', and 'ONLINE SERVICES'. The page title is 'Invoice' and there are buttons for 'Pay Invoice' and 'Print'. A message box on the left states: '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'. The invoice details include: 'Invoice' icon, 'Date: 8/29/2018', 'Invoice #: 1096031', and the applicant's name and address: 'JOHN TESTER DOE, 450 Columbus Blvd, Suite B, Hartford, CT 06103'. A table lists the invoice items:

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

A 'Pay Invoice' button is located at the bottom of the page.

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.**

The screenshot shows a credit card payment form with the following fields and values:

- \*\* Account Owner: Personal
- \*\* Credit Card Type: Visa
- \*\* Card Number: 4111111111111111
- \*\* Expiration Month / Year: 08 / 2019
- \*\* CVV Code: 123
- \*\* First Name: JOHN
- \*\* Last Name: DOE
- Company Name: (empty)
- Attention: (empty)
- \*\* Address: 450 Columbus Blvd
- Address: Suite B
- \*\* City: Hartford
- \*\* State: Connecticut
- \*\* Zip: 06103
- \*\* Country: UNITED STATES
- \*\* Phone: 8605551212
- \*\* E-mail Address: jason.purslow@po.state.ct.us

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

Submit Payment