

## **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".



## IRS SPECIAL ENROLLMENT EXAMINATION

### WHAT'S NEW

[How to create your online account and schedule your IRS SEE exam](#)

### ACTIONS

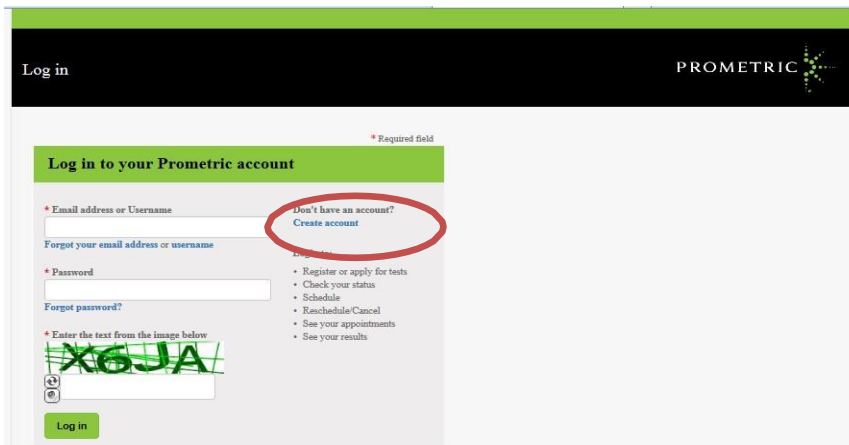
- [Locate](#)
- [Schedule](#)
- [Confirm](#)

### Important Changes

#### Possible Impact to Special Enrollment Exam Appointments

Please be aware that some upcoming Special Enrollment Exam (SEE) appointments may be impacted due to staff vacancies at certain test center locations. Prometric, who administers the SEE exam, has been impacted by personnel deficiencies due to the COVID-19 pandemic. As a result, some SEE candidates' appointments may be rescheduled on short notice to an alternate test center location, date, and time. If a candidate's appointment is affected, they will be notified via email with new appointment details and instructions.

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



Provide the following information then click "Create account":

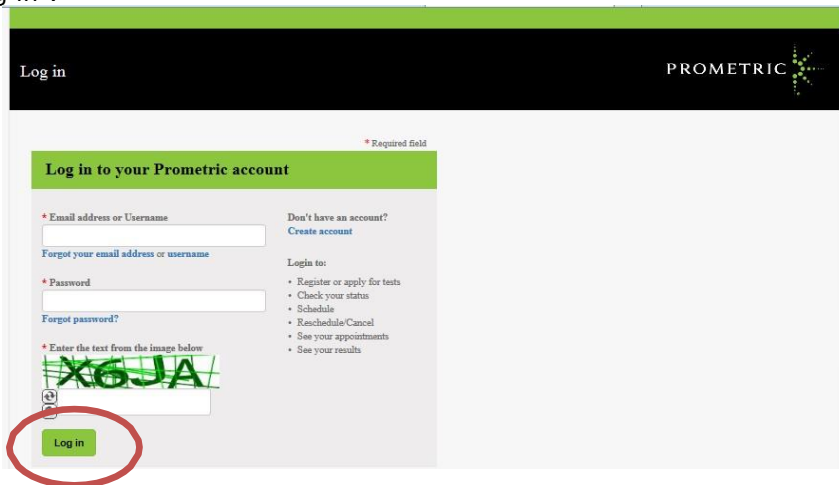
- Username
- Email Address
- Confirm Email address
- Password
- Re-enter password
- Check the box that you have read and agree to the Prometric Data Privacy Policy
- Enter text from the image
- Click on "Create account"

**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 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”.

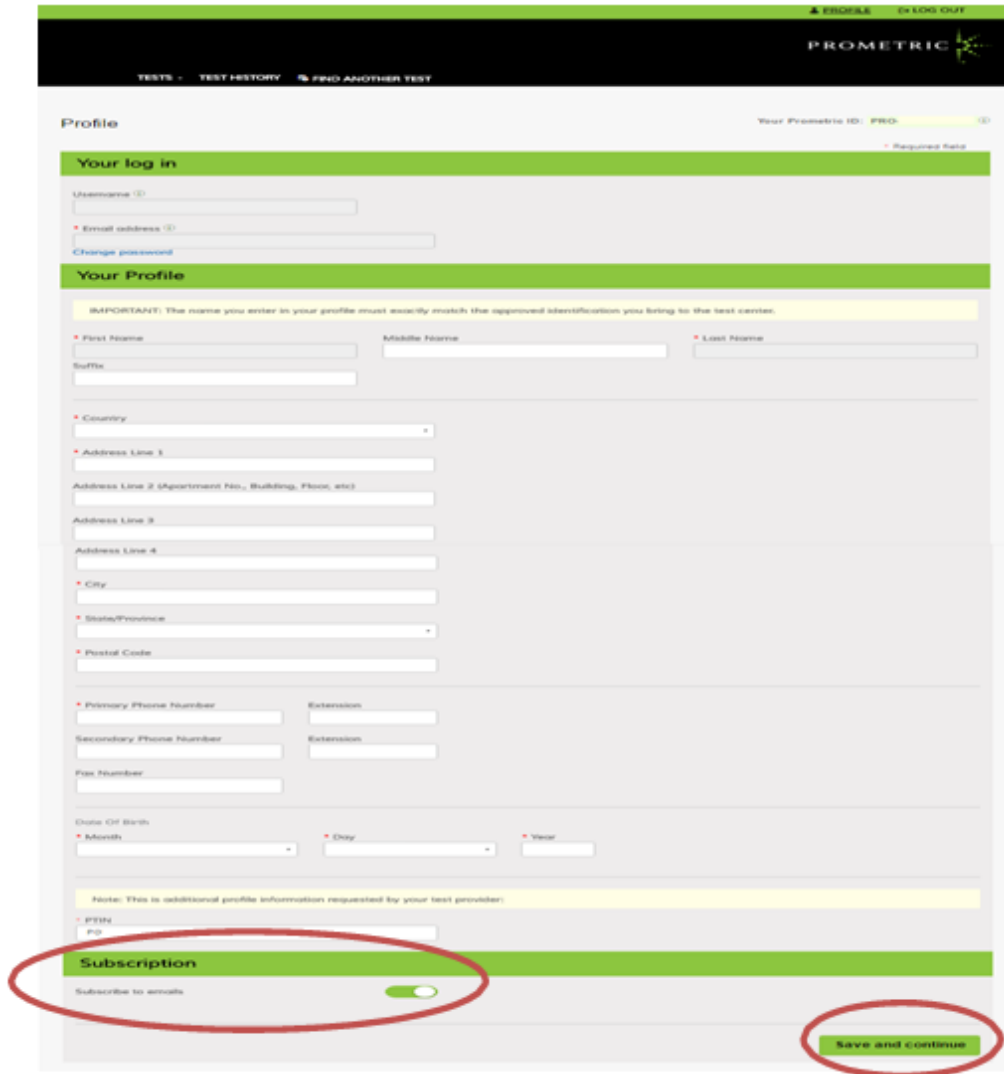


### C Update your profile

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

- First name, middle name, last name  
Note: 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) **Note: Verify you have entered the correct PTIN number.**

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



Profile Your Prometric ID: PRO-

**Your log in**

Username

Email address

[Change password](#)

**Your Profile**

**IMPORTANT:** The name you enter in your profile must exactly match the approved identification you bring to the test center.

First Name  Middle Name  Last Name

Suffix

Country

Address Line 1

Address Line 2 (Apartment No., Building, Floor, etc)

Address Line 3

Address Line 4

City

State/Province

Postal Code

Primary Phone Number  Extension

Secondary Phone Number  Extension

Fax Number

Date Of Birth

Month  Day  Year

**Note:** This is additional profile information requested by your test provider:

PTIN

**Subscription**

Subscribe to emails

**Save and continue**

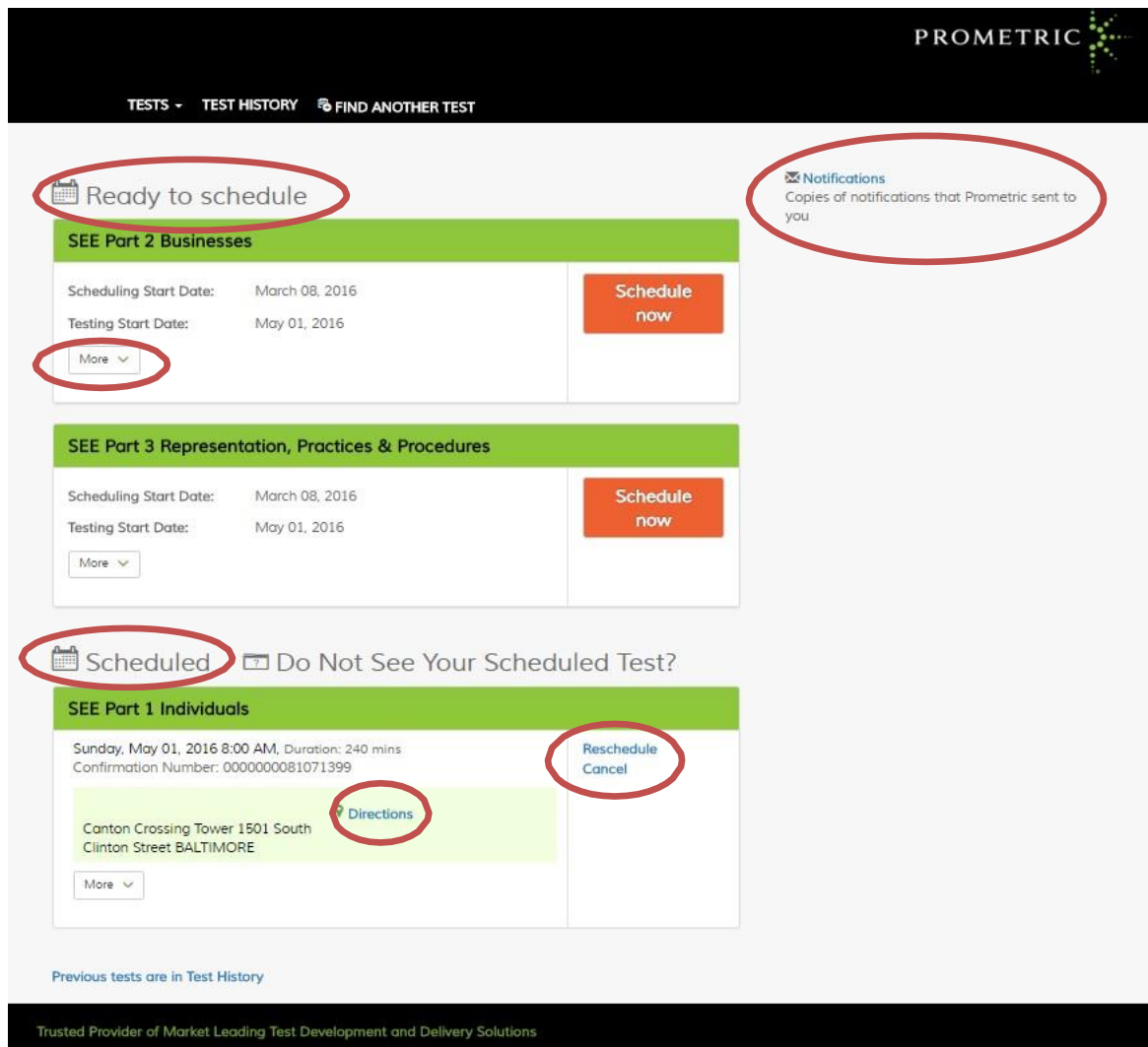
**After providing your profile information, please review it for accuracy.** You can access and update your profile page at any time by selecting "Profile" at the top of the webpage.

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.

- 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 “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 11 of this job aid for instructions to review your examination history.

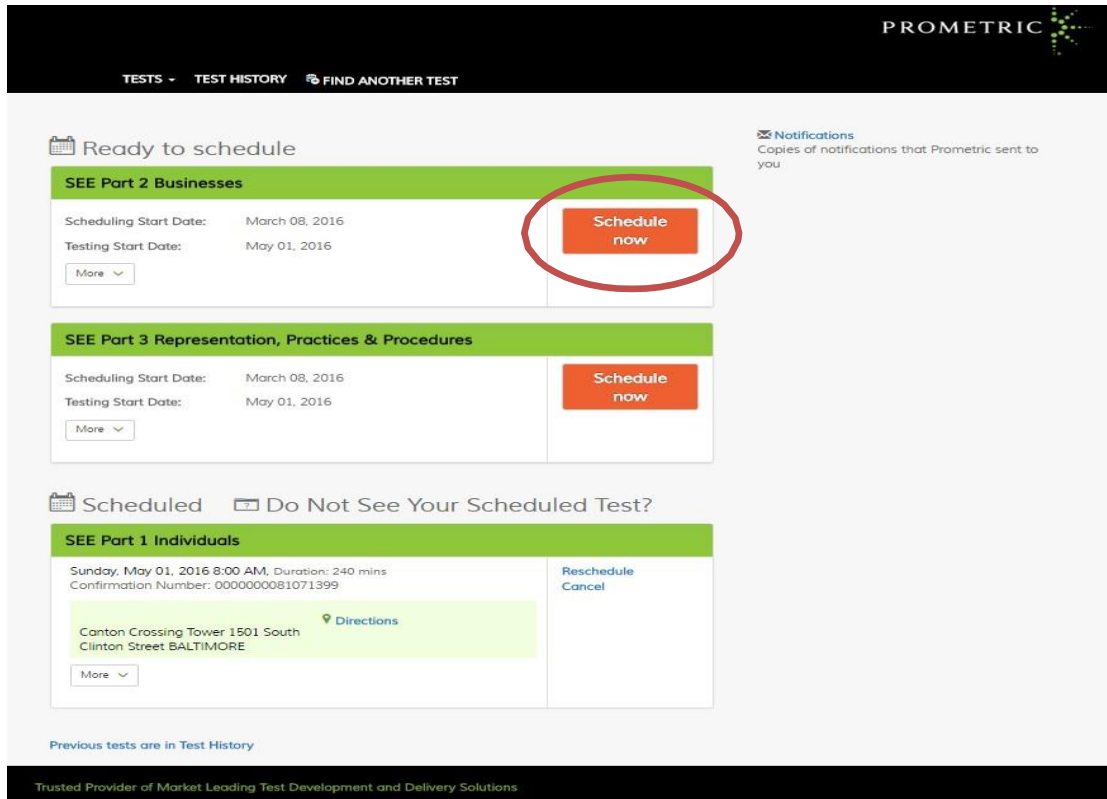


The screenshot displays the Prometric Candidate Account interface. At the top right is the Prometric logo. Below it is a navigation bar with links for 'TESTS', 'TEST HISTORY', and 'FIND ANOTHER TEST'. The main content area is divided into two sections: 'Ready to schedule' and 'Scheduled'. In the 'Ready to schedule' section, there are two test options: 'SEE Part 2 Businesses' and 'SEE Part 3 Representation, Practices & Procedures'. Each option shows scheduling and testing start dates (March 08, 2016 and May 01, 2016) and a 'Schedule now' button. A 'More' dropdown menu is circled in red for each option. In the 'Scheduled' section, there is a test entry for 'SEE Part 1 Individuals' scheduled for Sunday, May 01, 2016 at 8:00 AM. It includes a confirmation number and a 'Directions' link circled in red. There are also 'Reschedule' and 'Cancel' links circled in red. A 'Notifications' link is circled in red in the upper right corner of the main content area. At the bottom, there is a footer with the text 'Trusted Provider of Market Leading Test Development and Delivery Solutions'.

## 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.



The screenshot shows the Prometric Candidate Dashboard. At the top, there is a navigation bar with 'TESTS', 'TEST HISTORY', and 'FIND ANOTHER TEST'. Below this, the 'Ready to schedule' section is highlighted. It contains two main sections: 'SEE Part 2 Businesses' and 'SEE Part 3 Representation, Practices & Procedures'. Each section displays scheduling start and testing start dates (March 08, 2016 and May 01, 2016 respectively) and a 'Schedule now' button. The 'Schedule now' button for 'SEE Part 2 Businesses' is circled in red. Below these sections, there is a 'Scheduled' section with a link 'Do Not See Your Scheduled Test?'. The 'Scheduled' section shows details for 'SEE Part 1 Individuals' on Sunday, May 01, 2016, including a confirmation number and location (Canton Crossing Tower, 1501 South Clinton Street, BALTIMORE). A 'Reschedule' and 'Cancel' button are also visible. At the bottom, there is a footer with the text 'Trusted Provider of Market Leading Test Development and Delivery Solutions'.

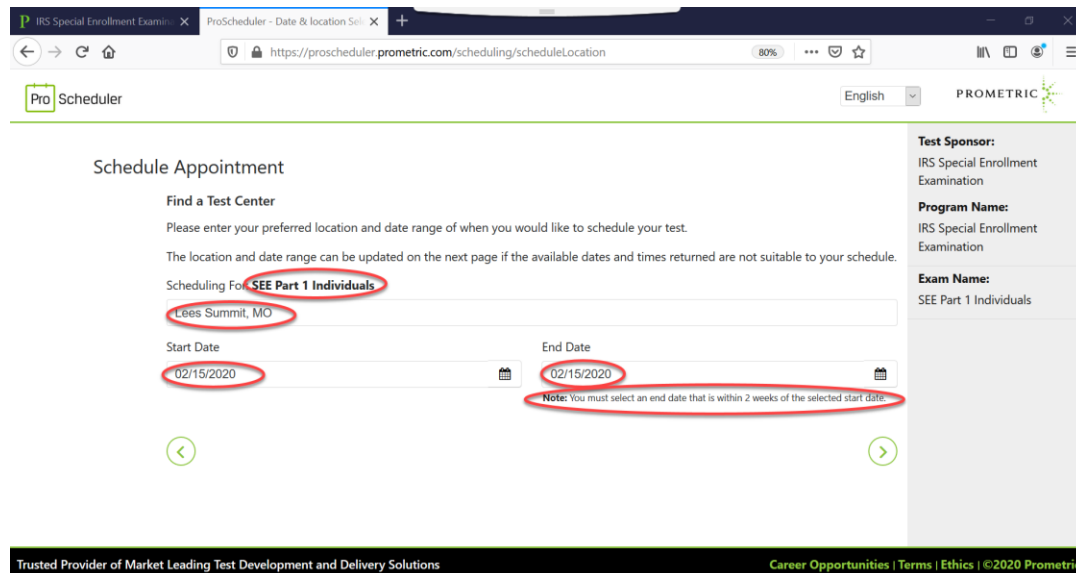
- o Read the Enrolled Agent Special Enrollment Exam (SEE) Information page, then click the green forward button.
- o Read the Policy Notice and Personal Data Privacy Disclosure & Consent Information page (scroll down to see the entire page). You must confirm that you are at least 18 years of age and 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:

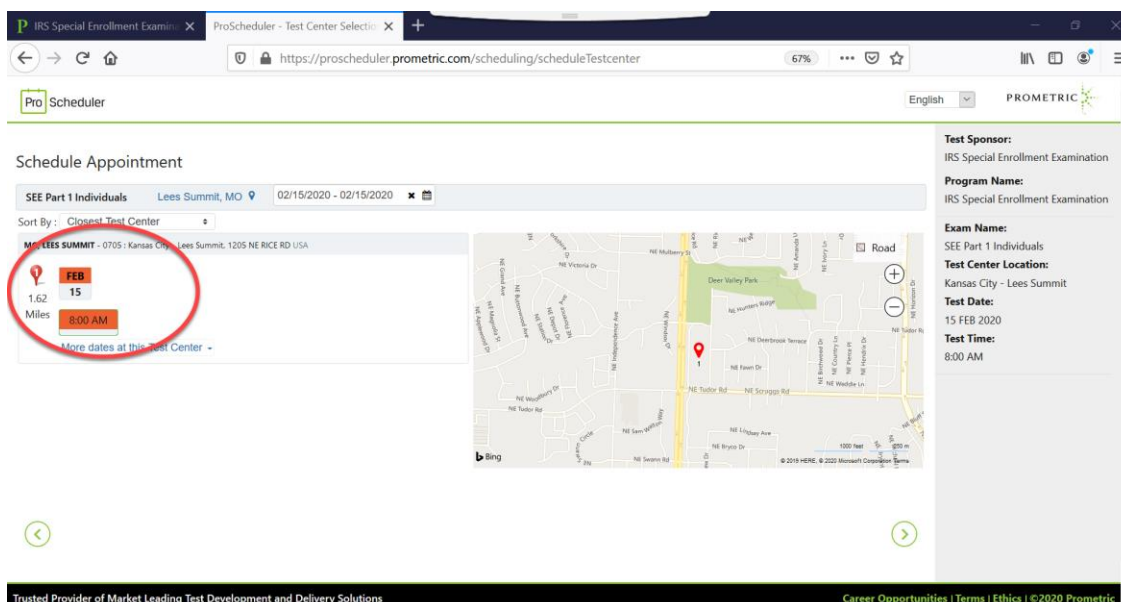
- o Verify the correct exam part is showing in the Test Selection field.
- o Enter the address, city or zip code where you would like to schedule your exam.
- o Enter start and end dates, then click green forward button.

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

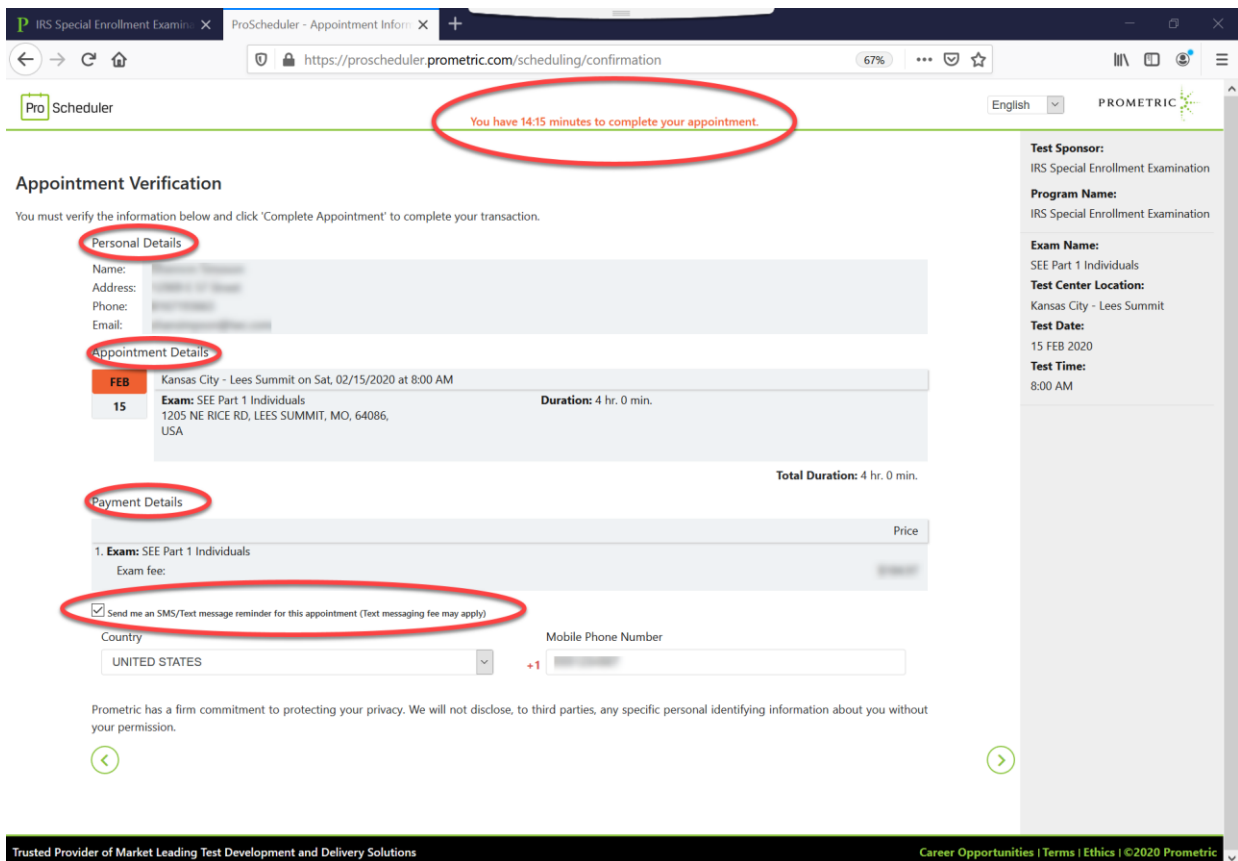
**You cannot schedule an examination more than 6 months in advance.**



- 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.



- Verify all appointment information is correct:
    - Personal Details
    - Appointment Details
    - Payment Details (fee)
  - 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.
  - 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.



**Appointment Verification**

You must verify the information below and click 'Complete Appointment' to complete your transaction.

**Personal Details**

Name: [Redacted]  
 Address: [Redacted]  
 Phone: [Redacted]  
 Email: [Redacted]

**Appointment Details**

<b>FEB</b>	Kansas City - Lees Summit on Sat, 02/15/2020 at 8:00 AM	<b>Duration:</b> 4 hr. 0 min.
<b>15</b>	<b>Exam:</b> SEE Part 1 Individuals 1205 NE RICE RD, LEES SUMMIT, MO, 64086, USA	

**Total Duration:** 4 hr. 0 min.

**Payment Details**

	Price
1. <b>Exam:</b> SEE Part 1 Individuals Exam fee:	[Redacted]

Send me an SMS/Text message reminder for this appointment (Text messaging fee may apply)

Country: UNITED STATES | Mobile Phone Number: +1 [Redacted]

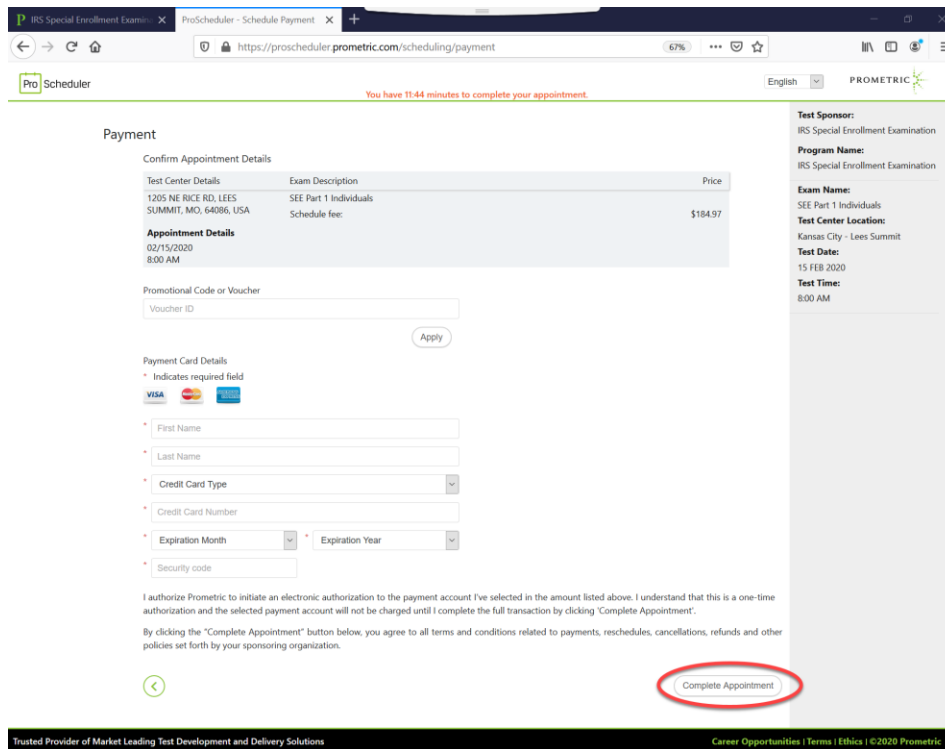
Prometric has a firm commitment to protecting your privacy. We will not disclose, to third parties, any specific personal identifying information about you without your permission.

**Test Sponsor:** IRS Special Enrollment Examination  
**Program Name:** IRS Special Enrollment Examination  
**Exam Name:** SEE Part 1 Individuals  
**Test Center Location:** Kansas City - Lees Summit  
**Test Date:** 15 FEB 2020  
**Test Time:** 8:00 AM

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- o Complete the payment information screen, then click "Complete Appointment" button.



**Payment**



Confirm Appointment Details

Test Center Details	Exam Description	Price
1205 NE RICE RD, LEES SUMMIT, MO, 64086, USA	SEE Part 1 Individuals Schedule fee:	\$184.97

**Appointment Details**  
02/15/2020  
8:00 AM

Promotional Code or Voucher  
Voucher ID:  Apply

**Payment Card Details**  
\* Indicates required field

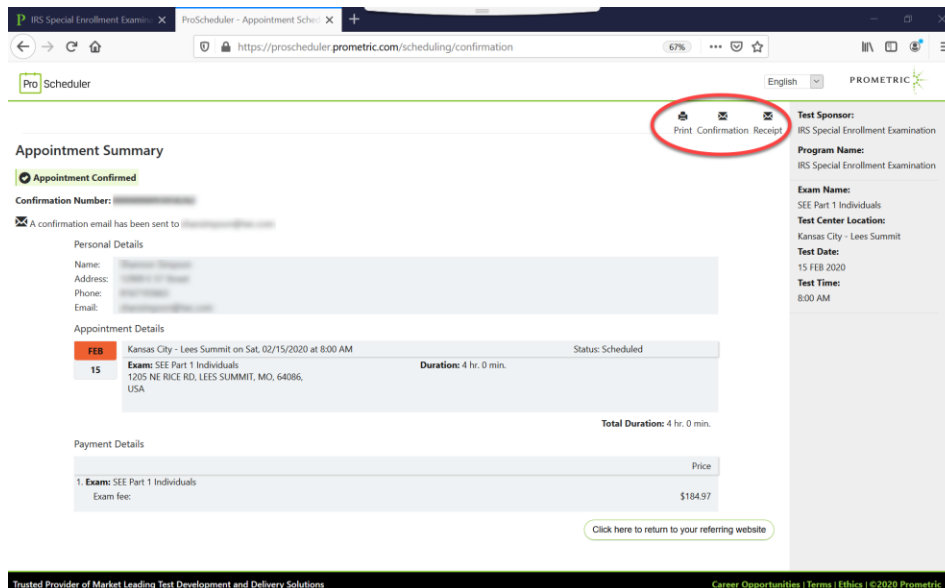
VISA  

\* First Name:   
\* Last Name:   
\* Credit Card Type:   
\* Credit Card Number:   
\* Expiration Month:  \* Expiration Year:   
\* Security code:

I authorize Prometric to initiate an electronic authorization to the payment account I've selected in the amount listed above. I understand that this is a one-time authorization and the selected payment account will not be charged until I complete the full transaction by clicking "Complete Appointment".  
By clicking the "Complete Appointment" button below, you agree to all terms and conditions related to payments, reschedules, cancellations, refunds and other policies set forth by your sponsoring organization.

Complete Appointment

- 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.**



**Appointment Summary**

**Appointment Confirmed**

Confirmation Number:

A confirmation email has been sent to

**Personal Details**  
Name:   
Address:   
Phone:   
Email:

**Appointment Details**

Month	Test Center	Exam	Date	Time	Status
FEB	Kansas City - Lees Summit	SEE Part 1 Individuals	02/15/2020	8:00 AM	Scheduled
15	1205 NE RICE RD, LEES SUMMIT, MO, 64086, USA	SEE Part 1 Individuals			

Duration: 4 hr. 0 min.  
Total Duration: 4 hr. 0 min.

**Payment Details**

Exam	Price
1. Exam: SEE Part 1 Individuals Exam fee:	\$184.97

Print Confirmation Receipt

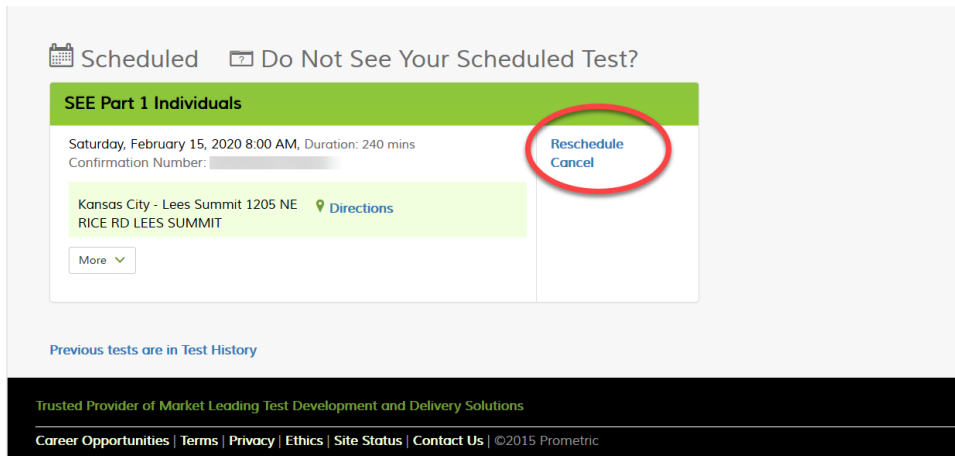
[Click here to return to your referring website](#)

- 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.

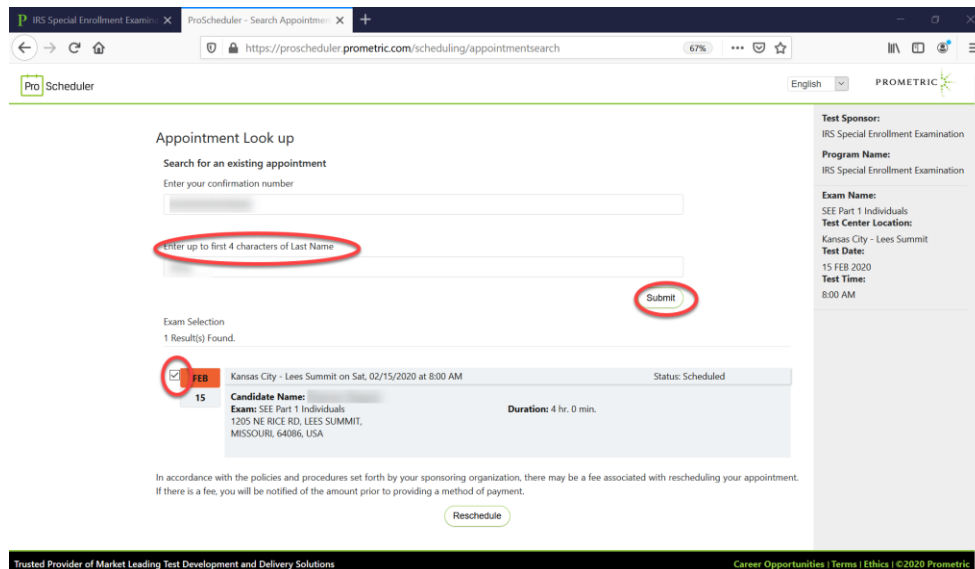
## Rescheduling or Cancelling an Appointment

Go to [www.prometric.com/SEE](http://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.

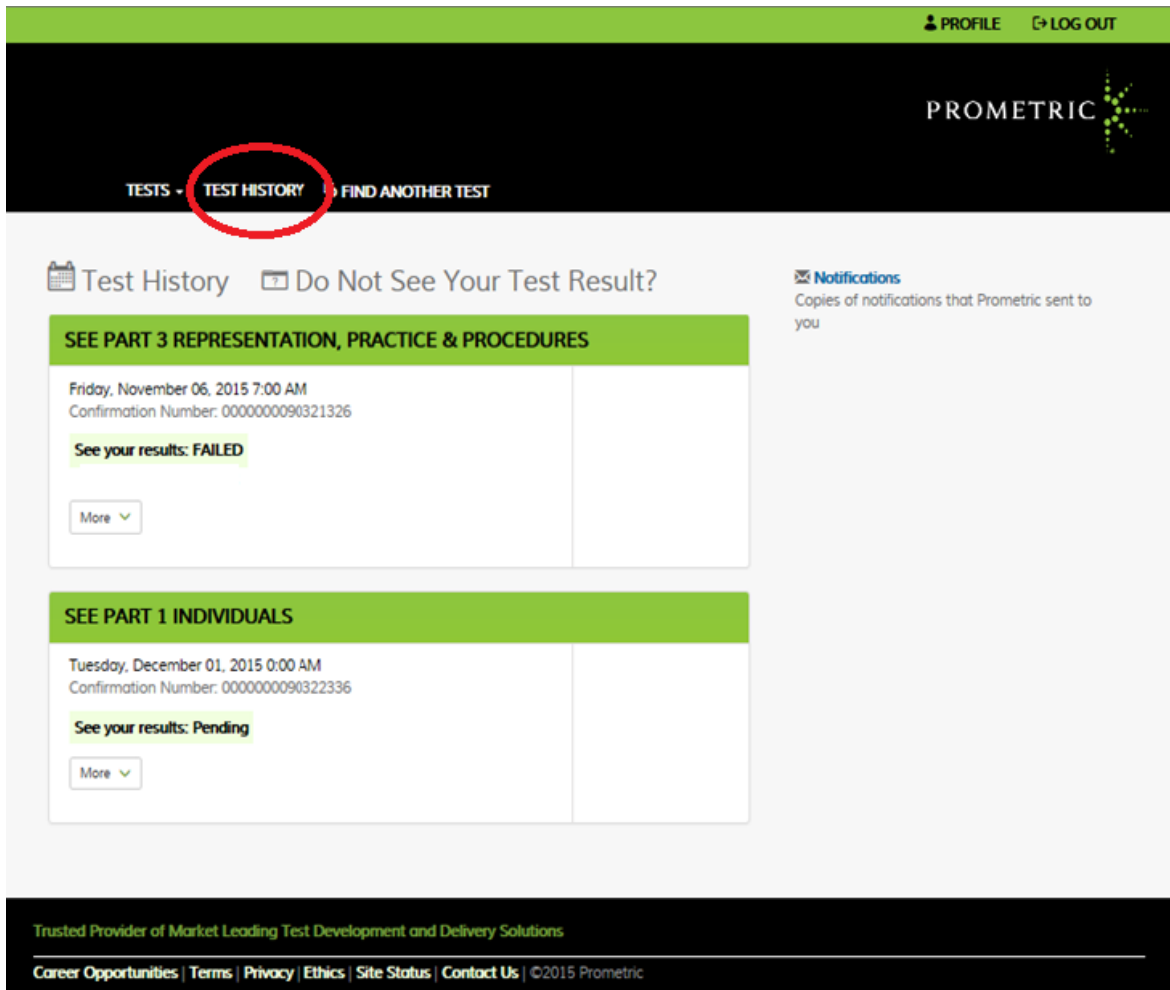


- **If rescheduling**, proceed to the select test center location, date, and appointment time that you want to reschedule your exam. Pay any fees, if applicable.
- **If cancelling**, review the information on the Cancellation Verification screen, and confirm you want to cancel by clicking the “Yes, I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

### Viewing Examination 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**”



The screenshot displays the Prometric Candidate Dashboard. At the top right, there are links for 'PROFILE' and 'LOG OUT'. The navigation bar includes 'TESTS', 'TEST HISTORY' (circled in red), and 'FIND ANOTHER TEST'. The main content area features a 'Test History' section with a calendar icon and a link 'Do Not See Your Test Result?'. Below this, there are two test entries:

SEE PART 3 REPRESENTATION, PRACTICE & PROCEDURES	
Friday, November 06, 2015 7:00 AM Confirmation Number: 0000000090321326	
See your results: <b>FAILED</b>	
<a href="#">More</a>	

SEE PART 1 INDIVIDUALS	
Tuesday, December 01, 2015 0:00 AM Confirmation Number: 0000000090322336	
See your results: <b>Pending</b>	
<a href="#">More</a>	

On the right side, there is a 'Notifications' section with a mail icon and the text: 'Copies of notifications that Prometric sent to you'. At the bottom, there is a footer with the text: 'Trusted Provider of Market Leading Test Development and Delivery Solutions' and a navigation bar with links: 'Career Opportunities | Terms | Privacy | Ethics | Site Status | Contact Us | ©2015 Prometric'.