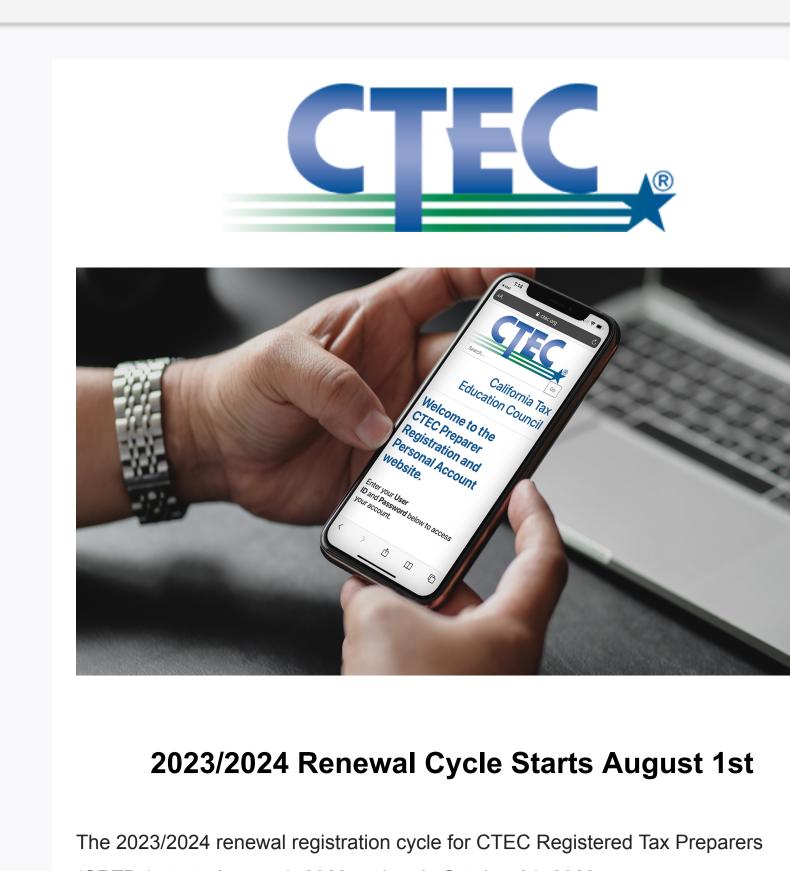
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(CRTPs) starts August 1, 2023 and ends October 31, 2023.

How do I renew online? To renew online, click on the CRTP Login button located on the homepage. To

Basic personal information

renew, you must have:

through your account on the CTEC website, as well as any reports made against the bond (see the blue box below for details regarding bond claims) • 20 hours of continuing education (10 hours of federal tax law, three hours of

• Current bond information and bond certificate - Bonds MUST be uploaded

uploaded into the CTEC database • A current IRS Preparer Tax Identification Number (PTIN) Visa or MasterCard to pay the \$33 registration fee

federal tax law updates, 2 hours of ethics and 5 hours of state) already

- **AVOID THIS MISTAKE!**
- Some CRTPs continue to log into their account, however, instead of following the renewal steps, they "reprint" their CTEC certificate for \$10 and think they registered.

registration fee! **CRTPs Now Required to** *Report* **Bond Claims Section 22250.1 of the Business and Professions Code** (h) On and after July 1, 2019, a tax preparer shall report a paid claim against its

Renewals can only be completed by following the above steps and paying the \$33

surety bond to the council, and the council shall post a notice of the claim on its internet website. Paid claims are self-reported. **How to Report Bond Claims** Under your CTEC account there's an option to select "Add New Paid Bond Claim." You need to enter the information on this page if a client made a claim against your bond for any damage you reportedly committed; this includes fraud, dishonesty, misstatement, misrepresentation, deceit, or any unlawful acts or omissions. If this is not the case, and you did none of the above - specifically, you have not had a claim against your bond - then your bond information does not need to be added on this page. However, if a bond claim has been filed and meets the above description, the bond information must be included on the bond claim page. If you have submitted a paid bond claim in error, you must remove the claim submission by selecting "Remove Paid Bond Claim." What if my education has not been reported? To renew online all of your education must be electronically reported to CTEC by your education provider. If your education is not showing up, call your education

Is unused education from last year accepted? CTEC's registration cycle runs from November 1st through October 31st of each

new 2023/2024 CTEC renewal cycle.

year, which means any education taken between those dates is good for the current registration cycle. For example, did you complete a course on or after November 1, 2022? Any unused education completed from that date until October 31, 2023 can be used towards the

provider(s) to upload the hours into the system and make sure they have your valid

CTEC ID number. Remember CTEC policy allows education providers 10 days from

the date the course was completed to report hours earned so please plan ahead.

BEFORE the new CTEC registration, cannot be used towards the renewal registration requirements. DO NOT COMPLETE CONTINUING EDUCATION PRIOR TO THE COMPLETION OF A NEW REGISTRATION.

PLEASE NOTE: CTEC education providers do not register you with CTEC. They are

only submitting the education to CTEC. You have to take the final step to

If you let your previous 2021/2022 registration expire/lapse and you registered

as a new tax preparer for 2022/2023, any continuing education you completed

renewal fee. Am I required to display my certificate? All current certificates must be made visible to consumers at the primary place of business. CTEC certificates can be displayed at the entrance, on desks or another

complete your registration with CTEC, which also includes paying the CTEC \$33

Late Renewals Due January 16, 2024

CRTPs who fail to meet the October 31, 2023 renewal deadline have until

January 16, 2024 (Due to the Martin Luther King Holiday) to pay the \$55 late fee,

plus the \$33 registration fee and renew late.

Missed the Late Renewal Deadline? What to Know...

a PTIN from the IRS, submit a new preparer application, and pay the CTEC

fees.

conspicuous location where business activities are performed.

CRTPs who miss the January 16th deadline to renew late will have to start over, pass a criminal background check and submit fingerprint images, PLUS retake the 60-hour qualifying education course, obtain a bond, provide proof of

Due to legislative changes that took effect July 1, 2020, CTEC cannot approve the status of applicants to register or reregister until a background check is passed. 2022/2023 Enforcement Results During the 2022/2023 fiscal year, the Franchise Tax Board Tax Preparer

Enforcement Team contacted more than 1,400 questionable tax preparers, including

Currently, there are 52% open cases still pending.

some who have failed to comply the prior year. Of those...

23% Complied or met requirements

• 23% were issued penalties

2% had penalties abated

If a tax preparer does not comply, the \$2,500 penalty is assessed. If a tax preparer still fails to comply the next year, a \$5,000 penalty will be issued each year until they either register with CTEC or agree to stop preparing tax returns for a fee. CTEC pays for the entire enforcement program. All penalties collected by FTB are deposited into the state's general fund. To report an unregistered tax preparer, visit ctec.org.

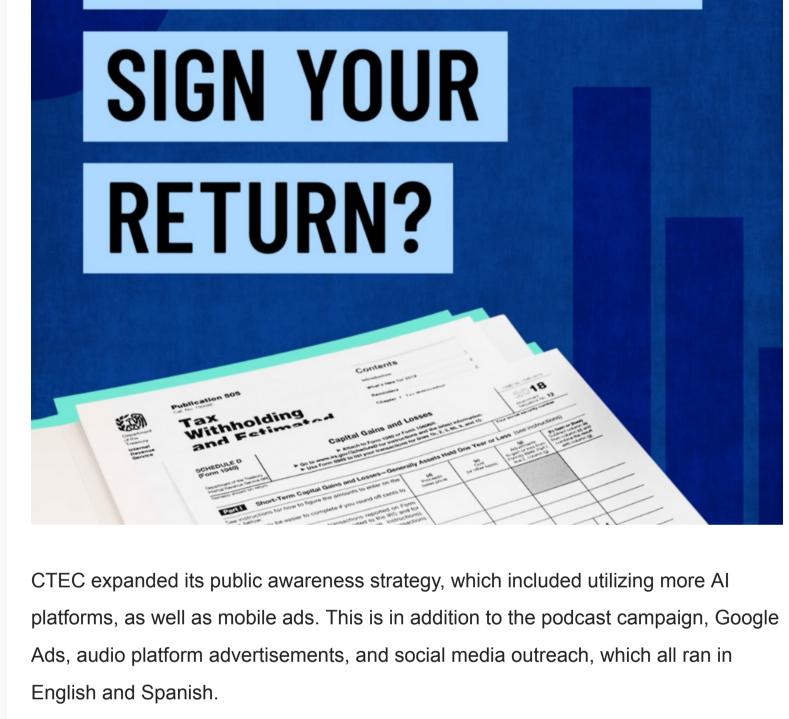
Unregistered tax preparers who are caught preparing, or assisting with preparing, tax

returns for a fee will be issued a \$2,500 penalty letter from the Franchise Tax Board

(FTB). They have 90 days to register with CTEC before the penalty is enforced.

Public Awareness Expands Digital Outreach

DID THEY AGREE TO



The podcast campaign now ranks well within the top 25% of national averages. Overall, more than 3.5 million taxpayers took action on the CTEC campaign, which included downloading the podcast, watching videos or clicking on an ad or social

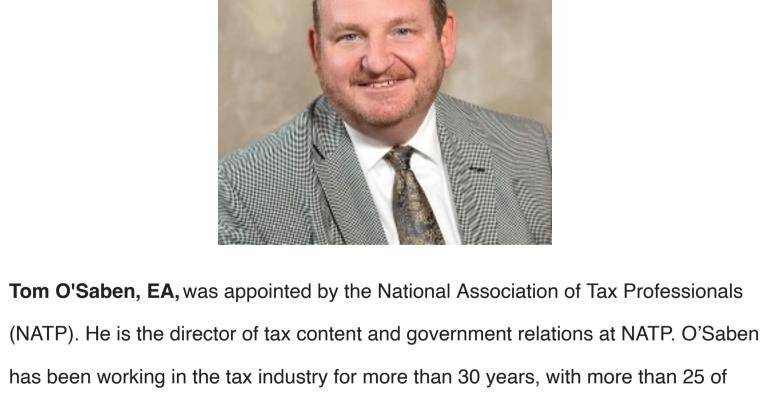
media post.

The campaign helped increase traffic to the website by more than 200% compared

to last year. Social media traffic also increased by 75% during the 2023 tax season.

CRTPs are encouraged to listen and share CTEC podcasts. Links to the podcasts are provided on CTEC.org or you can visit taxpayerbeware.org. To download the Spanish version, visit contribuyentecudese.org.

Welcome Our New CTEC Board Member



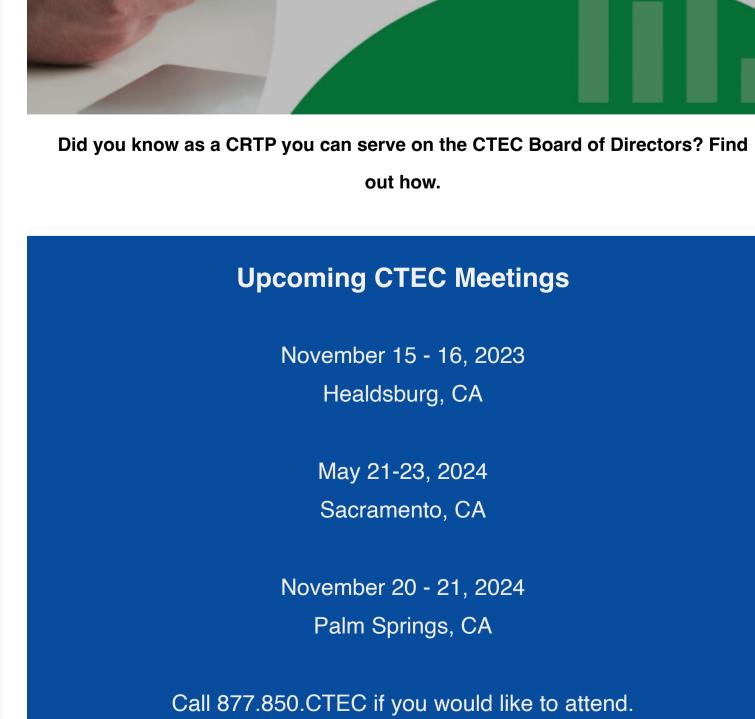
Prior to his current position at NATP, O'Saben taught a variety of tax topics to NATP members across the country. O'Saben's knowledge of the industry and implementation of tax law was also demonstrated when he worked as the assistant director of the Tax School program at the University of Illinois beginning in 2019.

those working as a tax preparer.

O'Saben earned his Bachelor of Science degree from Southern Illinois University Edwardsville in political science and is currently enrolled in a master's program concentrating in adult -education. O'Saben has the enrolled agent (EA) designation.

How to Become a CTEC Board Member

Call **877-850-2832** or sit CTEC.org



Government Partners CTEC partners with government organizations to help reach taxpayers and tax preparers regarding California requirements for professional tax preparation.

CTEC Board Members

Registration Renewals

CALIFORNIA Franchise Tax Board



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