



## Renewal Registrations Open August 1st

The 2024/2025 renewal registration cycle for CTEC Registered Tax Preparers (CRTPs) starts August 1, 2024 and ends October 31, 2024.

### How do I renew online?

To renew online, click on the [CRTP Login](#) button located on the homepage. To renew, you must have:

- Basic personal information
- Current bond information and bond certificate - Bonds **MUST** be uploaded through your account on the CTEC website, as well as any reports made against the bond (see below for details regarding bond claims)
- 20 hours of continuing education (10 hours of federal tax law, three hours of federal tax law updates, 2 hours of ethics and 5 hours of state) already uploaded into the CTEC database by your education provider
- A current IRS **P**reparer **T**ax **I**dentification **N**umber (PTIN)
- Visa or MasterCard to pay the \$33 registration and \$2 processing fee

***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. Renewals can only be completed by following the above steps and paying the registration fees!

[Renew Now](#)

## CRTPs Required to Report Bond Claims

### Section 22250.1 of the Business and Professions Code

On and after July 1, 2019, a tax preparer shall report a paid claim against its 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."

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## Know the FACTS! Frequently Asked Questions...

### 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 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.

**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 steps, as listed above, to complete your registration with CTEC.

### **Is unused education from last year accepted?**

CTEC's registration cycle runs from November 1st through October 31st of each 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, 2023? Any unused education completed from that date until October 31, 2024 can be used towards the new 2024/2025 CTEC renewal cycle.

**If you let your previous 2022/2023 registration expire/lapse and you registered as a new tax preparer for 2023/2024, any continuing education you completed *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.**

### **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 conspicuous location where business activities are performed.

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## **Late Renewals Due January 15, 2025**

CRTPs who fail to meet the October 31, 2024 renewal deadline have until January 15, 2025 to pay the \$55 late fee, plus the \$33 registration and \$2 processing fees and renew late.

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

CRTPs who miss the January 15th deadline to renew late will have to start over as a new preparer, pass a criminal background check and submit fingerprint images, PLUS retake the 60-hour qualifying education course, obtain a bond, provide proof of a PTIN from the IRS, submit a new preparer application, and pay the CTEC application and registration fees.

As of July 1, 2020, due to new legislative changes, CTEC requires applicants to pass a background check before approving the registration or re-registration status.

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# IRS Tax Forum Requirements

In order to receive continuing education credits at the IRS Tax Forums, CRTPs ***MUST PROVIDE THEIR CTEC IDENTIFICATION NUMBER*** (All numbers start with an "A" followed by a six digit number) when signing up with the IRS.

There have been many calls where CRTPs claim they did not receive a certificate of completion from the IRS Tax Forum. This issue is most likely due to the IRS not having a CTEC ID number provided to them during the tax forum registration process.

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## CTEC Website Survey Coming Soon



The Council is revamping the CTEC website and will send a questionnaire to all CRTPs and education providers. This questionnaire seeks your feedback on your experience with the current website and any suggestions you may have.

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## **2024 Public Awareness Campaign**





For the 2024 CTEC public awareness campaign, CTEC promoted its podcast in English and Spanish and continued outreach through digital marketing.

During the 2024 tax season, the podcast received close to 88,000 total audio downloads and views on its vodcast. More than 418,000 taxpayers clicked on CTEC mobile ads and Google ads. CTEC also received more than 1.4 million views on its social media and mobile advertising video campaigns.

**NEW! FOLLOW CTEC ON LINKEDIN!**



## 2023/2024 Enforcement Results

During the 2023/2024 fiscal year, the Franchise Tax Board (FTB) Tax Preparer Enforcement Team contacted 1,941 questionable tax preparers, including some who failed to comply the prior year. Tax preparers in need of attention from enforcement are contacted by mail.

As of July 1, 2024...

FTB sent 1,115 contact letters. Of those...

- 721 – No previous penalty
- 394 – Previous penalty

In addition to mail, some may also be contacted by phone and in-person...

- 1,262 – Phone calls
- 247 – Site visits

Those with no previous penalties...

- 36% Complied
- 37% Penalties
- 16% Abated penalties
- 11% Open cases

Those with previous penalties...

- 13% Complied
- 69% Penalties
- 2% Abated penalties
- 16% Open cases

Unregistered tax preparers who are caught preparing or assisting with preparing tax returns for a fee will receive a \$2,500 penalty - a first failure to register penalty. However, the penalty will be waived if proof of a valid credential is provided to FTB within 90-days from the date the penalty notice is mailed to the tax preparer.

If the tax preparer does not provide FTB with proof of a valid credential, FTB will issue a \$5,000 penalty for each subsequent failure to register.

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](https://www.ctec.org).

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## Want to Serve on the CTEC Board?



Curious about CTEC's actions and initiatives? Wondering how we address concerns about questionable tax preparers and enhance public awareness? Here's your opportunity! CTEC continually accepts CRTP applications for Council positions as they become available.

For additional information and to complete the application, please click the link.

[Watch the Video](#)

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## Upcoming Board Meetings



Palm Springs, CA  
November 13 - 14, 2024

Sacramento, CA  
May 20 - 22, 2025

**CTEC Board**

PO Box 2890  
Sacramento, CA 95812

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