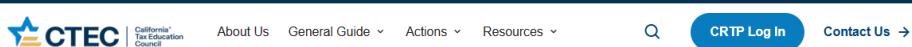


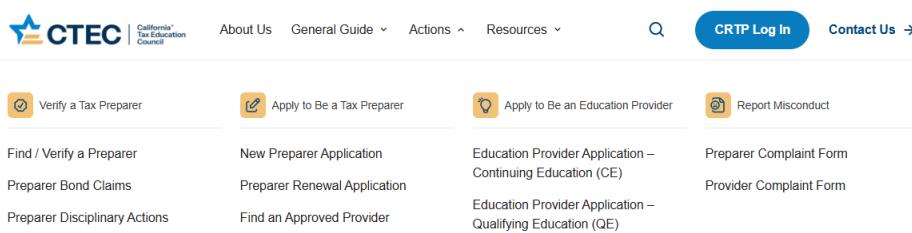
## CTEC New Application Process with Screenshots

1. Go to [www.ctec.org](http://www.ctec.org) and click the Actions menu



The screenshot shows the CTEC website homepage. At the top, there is a navigation bar with links for 'About Us', 'General Guide', 'Actions', and 'Resources'. On the right side of the navigation bar are 'CRTP Log In' and 'Contact Us' buttons. Below the navigation bar, the main title 'Safeguarding California's Taxpayers' is displayed in a large, bold, dark blue font. Below the title, a subtitle reads 'Stay informed, stay compliant. Work with approved professionals and access essential California tax education services to effectively navigate tax preparation.' A search bar is located at the top right of the main content area.

2. From the Actions menu, click New Preparer Application

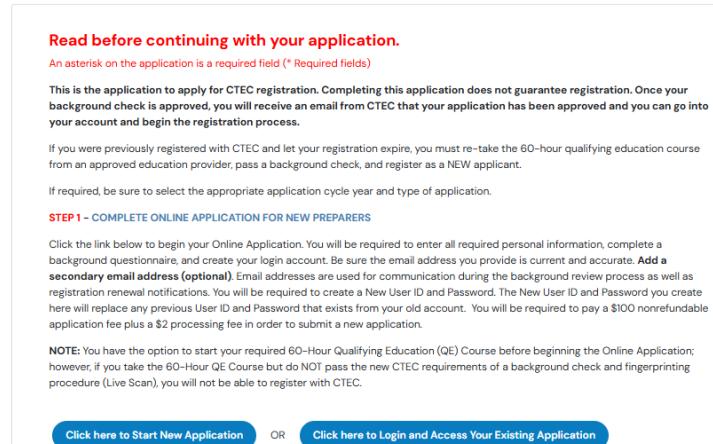


The screenshot shows the 'Actions' menu from the CTEC website. The 'Actions' menu is expanded, showing several options: 'Verify a Tax Preparer', 'Apply to Be a Tax Preparer', 'Apply to Be an Education Provider', 'Report Misconduct', 'Find / Verify a Preparer', 'New Preparer Application', 'Education Provider Application – Continuing Education (CE)', 'Preparer Complaint Form', 'Preparer Bond Claims', 'Preparer Renewal Application', 'Education Provider Application – Qualifying Education (QE)', 'Preparer Disciplinary Actions', 'Find an Approved Provider', and 'Provider Complaint Form'. The 'New Preparer Application' option is highlighted.

3. Read all of the provided information on the entire page, then Click Here to Start New Application



The screenshot shows the 'CTEC Tax Preparer New Application' page. The page has a light blue header with the title 'CTEC Tax Preparer New Application' in a large, bold, dark blue font. Below the header, there is a section with the heading 'Read before continuing with your application.' and a note: 'An asterisk on the application is a required field (\* Required fields)'. The page contains several paragraphs of text providing instructions and information for the application process. At the bottom, there are two buttons: 'Click here to Start New Application' and 'Click here to Login and Access Your Existing Application'.



**Read before continuing with your application.**  
An asterisk on the application is a required field (\* Required fields)

This is the application to apply for CTEC registration. Completing this application does not guarantee registration. Once your background check is approved, you will receive an email from CTEC that your application has been approved and you can go into your account and begin the registration process.

If you were previously registered with CTEC and let your registration expire, you must re-take the 60-hour qualifying education course from an approved education provider, pass a background check, and register as a NEW applicant.

If required, be sure to select the appropriate application cycle year and type of application.

**STEP 1 – COMPLETE ONLINE APPLICATION FOR NEW PREPARERS**

Click the link below to begin your Online Application. You will be required to enter all required personal information, complete a background questionnaire, and create your login account. Be sure the email address you provide is current and accurate. **Add a secondary email address (optional).** Email addresses are used for communication during the background review process as well as registration renewal notifications. You will be required to create a New User ID and Password. The New User ID and Password you create here will replace any previous User ID and Password that exists from your old account. You will be required to pay a \$100 nonrefundable application fee plus a \$2 processing fee in order to submit a new application.

**NOTE:** You have the option to start your required 60-Hour Qualifying Education (QE) Course before beginning the Online Application; however, if you take the 60-Hour QE Course but do NOT pass the new CTEC requirements of a background check and fingerprinting procedure (Live Scan), you will not be able to register with CTEC.

4. Read the information, be sure to click the confirmation box to agree then Continue New Application process

## CTEC Tax Preparer New Application

### New Application Checklist

#### Read before continuing with your application.

- If you were previously registered with CTEC and let your registration expire, you must re-take the 60 – hour qualifying education course from an approved education provider, pass a background check, and register as a NEW applicant. **Do not complete the annual 20 – hour continuing education courses before completing your new registration as a new preparer.**
- If required, be sure to select the appropriate application cycle year and type of application.
- You are required to have your **Full Social Security Number and your last name exactly as it appear on your Social Security Card**.
- You will need to enter all the required personal information.
- Be sure the email address you provide is current and accurate. **Add a secondary email address(optional).** Email addresses are required and are used for communication during the background review process as well as registration renewal notifications.
- You will be required to create a New User ID and Password. The New User ID and Password you create here will replace any previous User ID and Password that existed in your old account.
- You will be required to complete the background questionnaire section. **All offenses MUST be fully reported, even if they have been adjudicated, dismissed, expunged, or have occurred more than 10 years ago.**
- You will have the ability to upload any supporting documents to be used in the background investigation process. If there is additional information that you have forgotten to include with your application, you can email the supporting documents to [info@ctec.org](mailto:info@ctec.org).
- You will be required to pay a \$100 nonrefundable application fee plus a \$2 processing fee in order to submit a new application.
- You will be required to download and complete a Live Scan Form. Take the completed Live Scan Form with you to the Live Scan location you have selected, where they will complete the fingerprinting process and send the information electronically to the California Department of Justice(DOJ).
- The Live Scan Facility will return the completed form to you for your records. **DO NOT send this form to CTEC.**
- The California Department of Justice(DOJ) will notify CTEC electronically with your background information, **which will then be reviewed by the CTEC attorneys and paralegals. The CTEC process can take anywhere from 2 – 8 weeks from the date CTEC receives the results from DOJ.**
- You may be contacted by CTEC(via email) if additional information is needed regarding your background check. If additional information is requested and no response is received, you may receive a proposed denial letter.
- If your application is approved, you will receive an email from CTEC with instructions on how to proceed with the registration process.

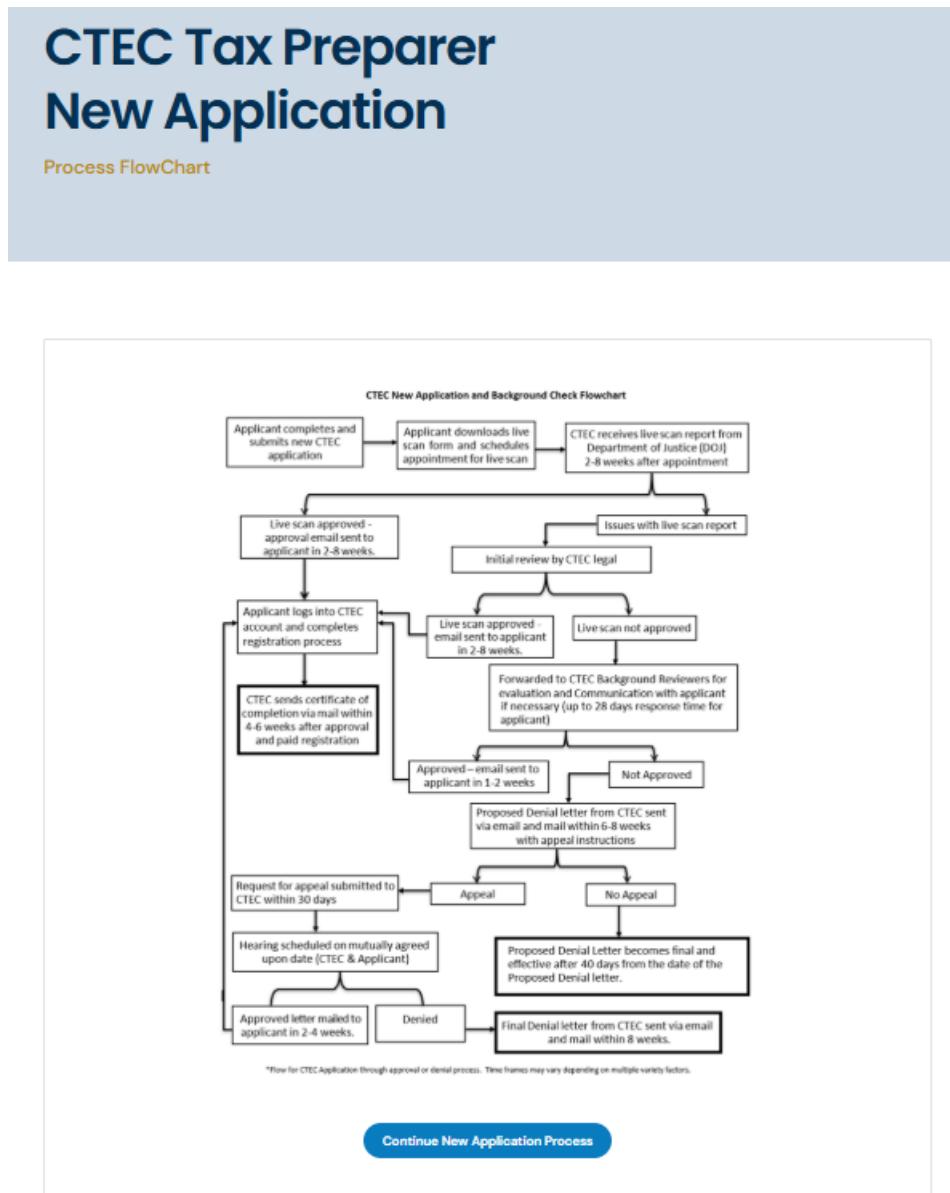
NOTE: Please note that your information will be shared with FTB, the IRS, and third parties.

Click the confirmation box below to continue registration.

I have read and understand the above procedures for initial application.

**Continue New Application Process**

5. View Flowchart then click Continue New Application process



6. Enter your full SSN, click the confirmation box as well as the I'm not a robot box, then Continue New Application Process



Enter Your Full Social Security Number

Click the confirmation box below to continue registration.

I hereby attest that I am the same person for whom the registration application is being submitted. I understand that this attestation is required to confirm my identity and ensure the accuracy of the registration process.

I'm not a robot   
reCAPTCHA  
Privacy • Terms

[Continue New Application Process](#)

7. Select Application Type (New Preparer Application or Experience in lieu Application) then Continue New Application



**Select Your Application Type**

**New Preparer Application**

This is the standard New Preparer Application which requires the completion of a 60 hour Qualifying Education Course.

**Continue New Application Process**

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**Experience in Lieu of Application**

Please review the below requirements to be sure you qualify for the experience in lieu of education exemption. Once you have reviewed this information and you feel you do meet the requirements **please contact the CTEC office to obtain a verification code**.

The California Business & Professions Code has identified the following experience in lieu of education exemptions:

1. Have been a **Certified Public Accountant, Enrolled Agent, or Attorney** for the most recent two years. In this case you will need to provide a "copy" of the license or certification for confirmation regardless of the state of issuance.
2. Have been **EMPLOYED by a Certified Public Accountant, Enrolled Agent, or Attorney** for the most recent two years. In this case you will submit a letter from your employer on company letterhead confirming both their own license or certification and your employment status. The letter should indicate that you have met the requirements for the experience in lieu of education application and elaborate on your tax preparation experience.
3. **Are you an individual who relocated into California?** An individual who has relocated into California and has been a tax preparer in another state for the most recent two years will be required to complete a 15-hour Qualifying California Tax Course. In order to provide proof of this, since most other states do not regulate tax preparers, we ask that you provide letters from a few of your clients indicating that you have prepared their taxes over the past years and confirming your tax preparation experience. You may also submit a letter from an employer stating your employment as a tax preparer. (see further requirements below for out of state applicants)

Enter Verification Code:

**Continue New Application Process**

8. Enter all of your information, create a username and password, and be sure to click the confirmation boxes at the bottom of the page, then click Continue New Application process

# CTEC Tax Preparer New Application

Information

## Add Your Information Details

\* required fields

**NOTE:** First Name, Middle Name and Last Name should be entered **exactly as it appears on your Social Security Card.**  
PTIN number can be entered now if you already have one but is not required until you complete your registration.

First Name \*

Middle

Last Name \*

DBA(Doing Business As) (optional)

PTIN Number (optional)

### Mailing Address Information

No P.O. Boxes allowed if you select physical address is same as mailing address below.

Mailing Address \*

County \*

City \*

State \*

Zip \*

Physical Address is the same as Mailing Address.

### Physical Address Information

No P.O. Boxes allowed for physical address.

Physical Address \*

County \*

City \*

State \*

Zip \*

DOB (Date of Birth)

\*

Residence Phone (optional)

Secondary Email (optional)

### Create Your CTEC Login Account

Add your CTEC login account information below. CTEC does require Multi-Factor Authentication and requires you to provide a Auth Code Email Address and Auth Code Cell Phone Number. You will be able to select which method to send Auth Codes to each time you login to the system.

#### Password Requirements:

- Password must be minimum of 8 characters.
- Password cannot be the same as the User ID.
- Password must contain at least 1 upper-case alphabetic character.
- Password must contain at least 1 lower-case alphabetic character.
- Password must contain at least 1 numeric character.
- Password must contain at least 1 non-numeric, non-alphabetic character.

User Name \*

Password \*

Confirm Password \*

Multi-Factor Auth Email Address \*

Multi-Factor Cell Phone \*

I would like to receive my renewal notice by email.

Education providers/Bond Companies purchase a mailing list from CTEC to promote their material. Check this box if you would like to be excluded from this list.

**Click the confirmation boxes below to continue registration.**

I have filed or will be filing my personal and/ or business tax returns for the past three years with the appropriate agencies(IRS and FTB).

I CERTIFY THAT THE FOREGOING IS TRUE AND CORRECT AND UNDERSTAND THAT IT IS MY RESPONSIBILITY TO NOTIFY CTEC OF ANY CHANGE IN MY CONTACT INFORMATION, SUCH AS MY MAILING ADDRESS, EMAIL ADDRESS, OR PHONE NUMBER AS SOON AS IT OCCURS.

**Continue New Application Process**

9. Answer the background questionnaire, be sure to click the confirmation box at the bottom then Continue New Application Process

## CTEC Tax Preparer New Application

Background Information

### CRIMINAL CONVICTION / DISCIPLINE DISCLOSURE FORM

Carefully read and provide detailed answers to the questions below. You must provide a yes or no response to all questions, and completely and accurately provide the detailed information required. Attach additional documents if you have other supporting documents to provide.

Making or giving any false statement or information, or failing to provide requested information, in connection with your CTEC application is a reason for denial of registration.

I further understand and agree that once this application is submitted, it is my responsibility to notify CTEC of any change in circumstances that might affect my eligibility for registration, including but not limited to changes that might affect my answers to the questions listed below provided on the application.

1. **Have you ever had a professional or vocational license, permit, certificate, or registration proposed to be or in fact was acted against (such as denied or disciplined), or received any form of enforcement action by any federal, state, or local agency, or foreign country or any other tax related organization?**  YES  NO

(\*If you answered "YES" to this question, please describe each and every action taken, including the date the action was taken, who it was taken by, describe the exact action taken (for example – revocation, suspension, denial, imposition of probationary terms, etc.), and generally describe the matter.)

2. **Have you ever been cited or sanctioned for engaging in unlawful activity related to tax preparation services, either in California or another state or with the IRS or foreign country?**  YES  NO

(\*If you answered "YES" to this question, please describe each and every action taken, including the date the action was taken, who it was taken by, describe the exact action taken, and generally describe the matter.)

3. **Have you ever been convicted of, or pled guilty or nolo contendere to, ANY federal or state criminal offense, felony, misdemeanor, infraction, or municipal code violation?**  YES  NO

- This includes any conviction, even if it has been adjudicated, dismissed, or expunged and should include ALL criminal offenses, regardless of the length of time since the incident occurred.
- You are not required to disclose marijuana related offenses specific in the Marijuana Reform Legislation and codified in Health and Safety Code sections 11361.5 and 11361.7.
- Convictions that were adjudicated in the juvenile court should NOT be reported.

(\*If the answer to this question is yes, provide dates and an explanation of the charges/events that led to the conviction(s) or upload supporting documentation.)

[Click here to upload supporting documents](#)

No documents uploaded.

4. **Have you ever used a name that is different from the name used for this application?**  YES  NO

- Maiden name, alias, etc.

(\*If the answer to this question is yes, please list any other names used below.)

**Click the confirmation box below to continue registration.**



I hereby certify, under penalty of perjury under the laws of the State of California, that all statements, answers, representations made on this form, and in any attachments, are complete, accurate, true and correct. I have reviewed the Tax Preparation Act and CTEC's Procedures applicable to CTEC Applicants and Registrants, and understand and agree to abide by these requirements.

[Continue New Application Process](#)

10. Select your Education Provider for the 60-hour QE course or click I have not yet selected an Education Provider

**Select Your Education Provider**

If you have identified the CTEC Approved Education Provider you will be using for your 60-hours QE course, select them from the drop-down list below. If you have not yet identified your CTEC Approved Education Provider, check the box "I have not yet selected an Education Provider".

**Select Your Education Provider**

Select

OR

I have not yet selected an Education Provider.

**Continue New Application Process**

11. Make payment for one-time application fee, please note this is separate from the \$35 registration fee which is due at the end of the application process.

# CTEC Tax Preparer New Application

Application Payment

<b>New Application Details</b>	<b>Payment Information</b>
Application Date: <b>12/3/2025</b> Application Cycle: <b>2025/2026</b> Application Type: <b>QE</b> Application Fee: <b>\$100.00</b> Processing Fee: <b>\$2.00</b>  <b>Total Amount to be Charged: \$102.00</b>	Credit Card Number <input type="text"/>  Expiration Date <input type="button" value="select month ▼"/> / <input type="button" value="select year ▼"/>  CVV (3 digits on back of card) <input type="text"/>
<b>Submit Payment and Process New Application</b>	