

Dec 21, 2015

Directory of Federal Tax Return Preparers with Credentials and Select Qualifications

User Guide



Table of Contents

Description	3
Searching for Tax Return Preparers	3
Country	3
Zip or Postal Code	3
Distance	4
Last Name	5
Credentials/Qualifications	6
Search Results	6
Information on Preparer Credentials	7
Print and Favorites Icon	8

Directory of Federal Tax Return Preparers with Credentials and Select Qualifications

The Directory of Federal Tax Return Preparers with Credentials and Select Qualifications is a web-based tool that assists taxpayers in identifying tax return preparers by name or geographic area. The preparers listed on this database are currently registered with the IRS and have obtained one or more professional credentials or other qualifications. Preparers who do not have credentials or an Annual Filing Season Program (AFSP) Record of Completion, are not included in this directory, nor are volunteer tax return preparers who offer free services.

Searching for Tax Return Preparers

A search can be conducted using a single search option or a combination of options:

- **Country**
 - To search by country, select the desired country from the drop down box.

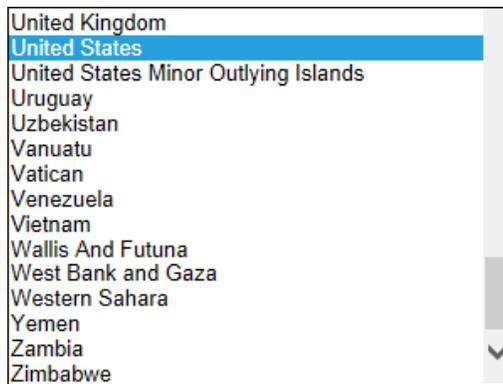


Figure 1

- **Zip or Postal Code**
 - To search by zip, enter a five digit or nine digit zip code.

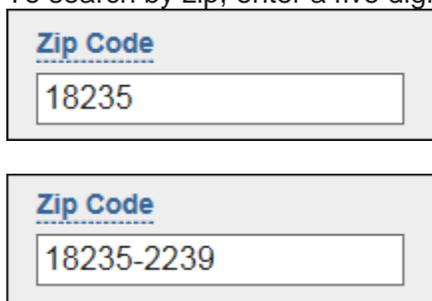


Figure 2

- The Zip Code label is a hyperlink that displays a Help Box when clicked on

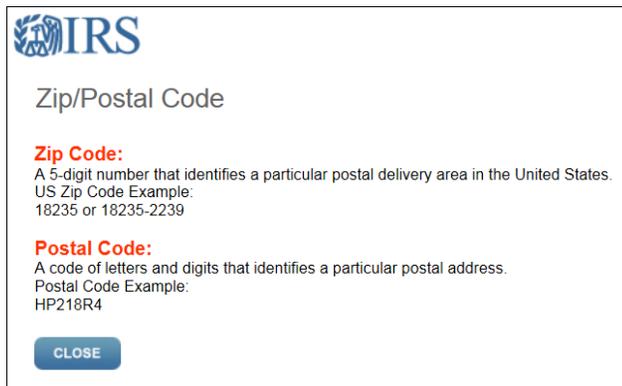


Figure 3

- To search by postal code, enter a combination of numbers and letters. Postal codes are generally used for countries other than the United States. Mileage is not displayed as a search option for countries other than the United States.

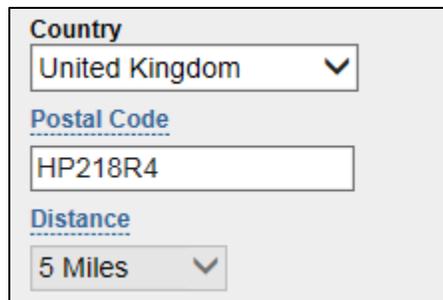


Figure 4

- **Distance**

- Mileage represents the number of miles away from the zip code entered.
- To search by distance select one of the mileage options.

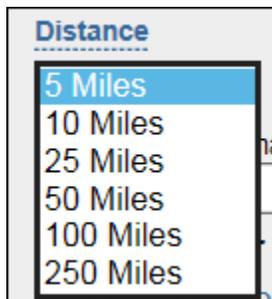


Figure 5

- The Distance label is a hyperlink that displays a Help Box when clicked on.

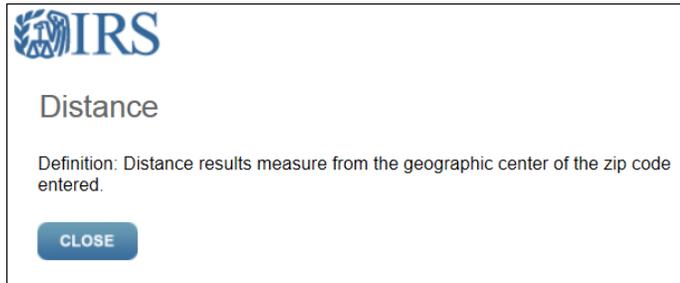


Figure 6

- **Last Name**

- To search by name enter either the whole last name or a minimum of the first three letters.
- To search for a person with a hyphenated last name, input the whole name with the hyphen (ex. Doe-John). Hyphenated names can also be searched with the leading name (ex. Doe) of the last name and then search through the list of preparers provided.

The image shows a search input field with the label 'Last Name (You may enter the first 3 letters of the last name for a search result.)'. The input field contains the text 'Doe-John' and a small 'x' icon to the right of the text.

The image shows a search input field with the label 'Last Name (You may enter the first 3 letters of the last name for a search result.)'. The input field contains the text 'Doe' and a small 'x' icon to the right of the text.

Figure 7

- To search for a preparer with a suffix, input the last name with the suffix or input the last name only and search through the list of preparers provided.

The image shows a search input field with the label 'Last Name (You may enter the first 3 letters of the last name for a search result.)'. The input field contains the text 'Doe Jr' and a small 'x' icon to the right of the text.

The image shows a search input field with the label 'Last Name (You may enter the first 3 letters of the last name for a search result.)'. The input field contains the text 'Doe' and a small 'x' icon to the right of the text.

Figure 8

- **Credentials/Qualifications**

- To search for a preparer by credential or qualification, select at least one of the credentials/qualifications provided. This is not a required field, so a selection for this search criteria can also be left blank.

Credentials/Other (check all that apply or none if no preference)

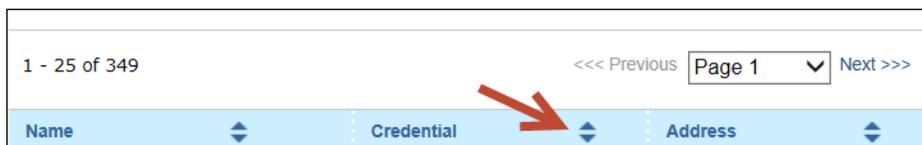
- [Attorney Credential](#)
- [Certified Public Accountant Credential](#)
- [Enrolled Agent Credential](#)
- [Enrolled Actuary Credential](#)
- [Enrolled Retirement Plan Agent Credential](#)
- [Annual Filing Season Program Participant](#)

Figure 9

Search Results

Search results will display in ascending order beginning with the distance from the zip code entered (if zip code was input as search criteria), name (alphabetically, last name, first name), credential and location (city, state and zip code).

The results page will allow the user to sort results either alphabetically by last name, by credential, or alphabetically by city if desired by clicking on the down arrow of the column header.



1 - 25 of 349 <<< Previous Page 1 Next >>>

Name	Credential	Address
------	------------	---------

Figure 10

Search results will display 25 preparers per page. Pagination is displayed at the top and bottom of the search results table, allowing the user to either select the 'Next' link or select from the page dropdown option.



Search Results

1 - 25 of 349 <<< Previous Page 1 Next >>>

Figure 11

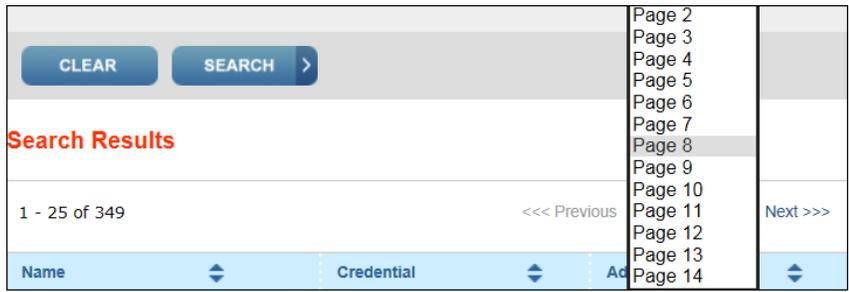


Figure 12

When a search exceeds 1000 results, a message will display stating, "See the top 1000 names or refine your search." A user can refine their search by adding or changing search criteria to the existing input.

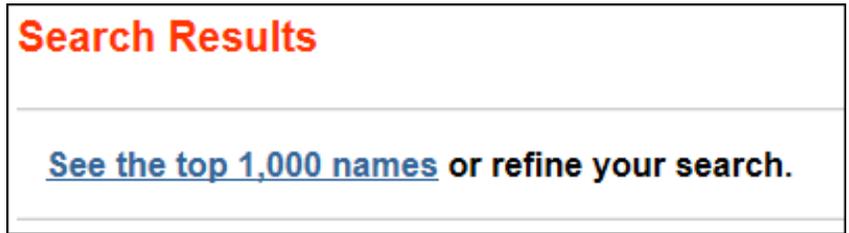


Figure 13

Information on Preparer Credentials

To learn more about the different types of preparer credentials and qualifications, click on the links located on the right side of the screen under More Information.

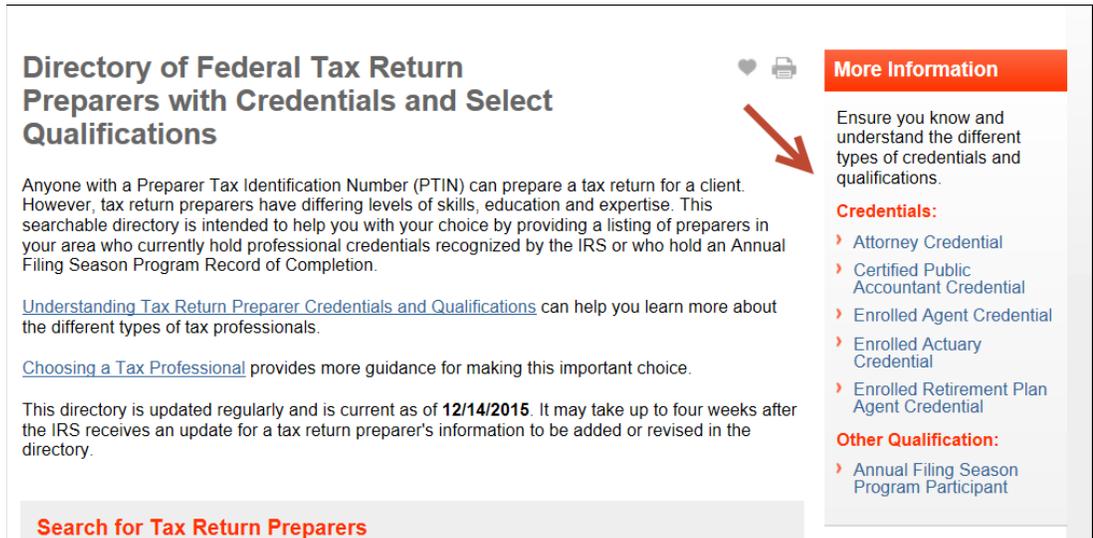


Figure 14

- The Credential labels are hyperlinks that display detailed descriptions when clicked on.

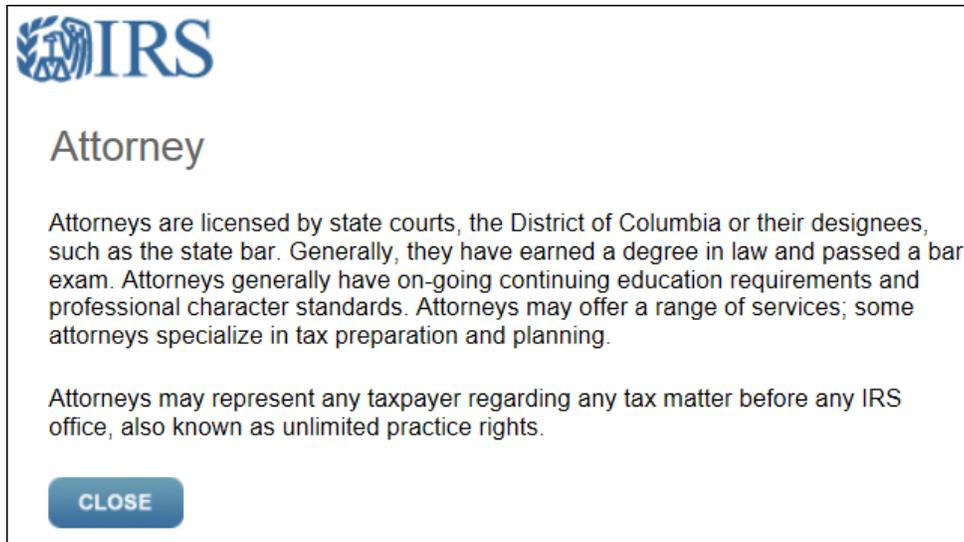


Figure 15

- Clicking the links next to the 'Credentials/Other' search criteria will display the same detailed description.



Figure 16

Print and Favorites Icons

- Select the (heart) icon to bookmark the page in the browser.
- Selecting the Printer icon will display the computer(s) print properties screen allowing the user to print the screen in printer-friendly format.
- NOTE: If using Internet Explorer 8 as your browser, select "Tools" from the menu bar and select "compatibility view" (check mark next to it) in order to print properly.

Directory of Federal Tax Return Preparers with Credentials and Select Qualifications



Anyone with a Preparer Tax Identification Number (PTIN) can prepare a tax return for a client. However, tax return preparers have differing levels of skills, education and expertise. This searchable directory is intended to help you with your choice by providing a listing of preparers in your area who currently hold professional credentials recognized by the IRS or who hold an Annual Filing Season Program Record of Completion.

[Understanding Tax Return Preparer Credentials and Qualifications](#) can help you learn more about the different types of tax professionals.

[Choosing a Tax Professional](#) provides more guidance for making this important choice.

This directory is updated regularly and is current as of **12/14/2015**. It may take up to four weeks after the IRS receives an update for a tax return preparer's information to be added or revised in the directory.

More Information

Ensure you know and understand the different types of credentials and qualifications.

Credentials:

- › Attorney Credential
- › Certified Public Accountant Credential
- › Enrolled Agent Credential
- › Enrolled Actuary Credential
- › Enrolled Retirement Plan Agent Credential

Other Qualification:

- › Annual Filing Season Program Participant

[Search for Tax Return Preparers](#)

Figure 17