



 National Association  
of Enrolled Agents

## NAEA Education FAQs: NAEA Education & Events and CE Portal

### Topic: General Information

#### How do I create a profile?

If you are a member, your profile is created automatically when you create your membership. **Make sure you add your PTIN to your member account for CE!** If you want the information to display in your online PTIN account in the future, you must submit your PTIN to your CE provider (NAEA).

Non-members can create a profile by following the steps below:

- Go to [NAEA.org](http://NAEA.org)
- Hit login in the top right
- On the bottom right of the log-in screen hit "Not a member?"
- Fill out the profile information - **make sure to include your PTIN for IRS CE**
- Save
- Navigate back over to the [CE portal](#)
- Hit sign-in in the upper right - this will auto log you in now that you have a profile on NAEA.org

#### What form of payments are accepted?

Online registration for individual courses requires a credit card. We accept VISA, MasterCard, and American Express. Please note: *we are not able to accept Purchase Orders for individual course purchases.*

#### Support questions / Feedback / Complaints?

Please use the blue Help button for any support questions you may have on the NAEA CE Portal LMS platform. Please send any feedback or complaint to: [education@naea.org](mailto:education@naea.org)

### Topic: Member Information

#### As a member, do I receive a discount on CE and events offered by NAEA?

YES! Member prices are discounted. When purchasing an education product, the member and non-member price are always displayed. Note: When purchasing a Journal quiz or Webinar online, the default non-member will display until you click "Add to Order;" the member price displays when you proceed to checkout.



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**I am a member but when I add the education item to my cart the non-member price appears.**

When purchasing a Journal quiz or Webinar online, the default non-member will display until you click “Add to Order;” the member price displays when you proceed to checkout. If you have already added it to your cart and the nonmember price still appears, email [education@naea.org](mailto:education@naea.org).

**Topic: Past and Current CE**

**How do I get my old Continuing Education (CE) certificates?**

To obtain CE Certificates, please contact NAEA education team via email at [education@naea.org](mailto:education@naea.org) to get your certificates prior to 2019.

**How do I get my current CE certificate?**

Login to the NAEA website: [www.NAEA.org](http://www.NAEA.org), and navigate to your member account, Select CE Portal from the menu, and select the sign-in button on the upper right corner again (this will automatically log you in to the NAEA Continuing Education portal.) Click on your name in the top right corner and scroll down until you see your member activity. Select the certificates tab to view your certificates. Detailed instructions can be found [here](#).

**I logged into the NAEA Continuing Education Portal, but I am missing certificates of courses that were completed. What do I do?**

First make sure you completed all items in the course to receive the certificate such as viewing the presentation, taking the survey and assessments. Once the items have been completed, the certificate should be able to access and print. Follow [these instructions](#) on how to check if you completed all items. If all items have been completed and you still don't have your certificate, contact the NAEA education team via email [education@naea.org](mailto:education@naea.org).

**When do you report Continuing Edition (CE) Hours to the IRS CE Provider website?**

NAEA reports Continuing Education (CE) to the IRS on a monthly basis from January to October. Beginning in October, NAEA reports CE weekly. If you do not see your CE Hours from the previous month in your IRS PTIN account, contact the NAEA education team via e-mail at [education@naea.org](mailto:education@naea.org).

**What other certifying agencies does NAEA In-Person and Online education qualifying?**

NAEA education has a relationship with the following Continuing Education certifying agencies: California Tax Education Council (CTEC), and Certified Financial Planner (CFP) Board CE/CPE. Detailed information can be found on the education webpage or on the NAEA certificate. If you have questions, regarding the CE Hours and the certifying agency requirements, contact the NAEA education team via email at [education@naea.org](mailto:education@naea.org).



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Topic: How to purchase and access NAEA education and events

### **How do you purchase content in the NAEA continuing education portal?**

Follow these [handy instructions](#) to purchase content on the NAEA Continuing Education Portal.

### **I accidentally purchased a program twice or received the non-member price when I am an active member. How do I get a refund?**

To request refunds, contact the NAEA education team via email [education@naea.org](mailto:education@naea.org). An NAEA education team member will review the request for refund and submit the request for approval. Once the refund request has been approved, the refund will be refunded on the same method of purchase, either a credit on the original purchase credit card, or if paid by check a refund check will be sent to you.

### **How do I check my progress in an NAEA online course?**

To check your progress on a course you must log-in to the [NAEA Continuing Education Portal](#). Follow [these instructions](#) on how to log in to the NAEA website and how to check your progress status for a course.

What is the cancellation policy?

What is the refund policy/process?

## **Topic: National Tax Practice Institute**

What is the NTPI Certificate Program?

The National Tax Practice Institute™ (NTPI®) is a three-level program developed to sharpen the skills of enrolled practitioners at all stages of their careers. With each level of this program, the core curriculum enables participants to expand their knowledge and skills, and gain the confidence needed to successfully guide their clients through the often-challenging maze of IRS codes, internal regulations, and agency structure. Please note that this program is open only to enrolled agents, CPAs, and tax attorneys. Those who complete Levels 1, 2, and 3 earn the distinction of [NTPI Fellow®](#), a designation held by the nation's top tax practitioners.

How do I complete the NTPI program and become a fellow?

A participant must complete all three NTPI Levels as well as a professional portfolio within a five-year period beginning with NTPI Level 1 courses in order to earn the NTPI Fellow designation. Once all 3 levels of courses have been completed a participant will receive a NTPI



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Level 3 certificate. A graduate can add the certificate designation of NTPI Fellow on all media. Learn more about the NTPI program and its requirements on the [NTPI Website](#) under the NTPI tab. Once all the NTPI course materials for all levels is completed, let us know if you plan to attend an upcoming graduation by completing [this form](#).

I already started the NTPI program. Do I have to repurchase the content with the revised NTPI content in 2021?

If you took any of the NTPI course levels prior to 2016, you would have to take the new NTPI content that is offered in 2021. Find out the requirements of the classes that you will need to take and the new additional requirements for NTPI Level 3 beginning in 2022 on the [Roadmap to NTPI](#).