



PSI Services LLC
3210 E Tropicana
Las Vegas, NV 89121
Phone: (800) 733-9267
Fax: (702) 932-2666
E-mail: examschedule@psionline.com
www.psiexams.com



Oregon Board of Tax Practitioners

CANDIDATE INFORMATION BULLETIN

| | | | |
|--|---|---|---|
| Guidelines for Examination Qualification | 2 | Required Identification..... | 4 |
| Examination Payment and Scheduling Procedures..... | 2 | Security Procedures..... | 4 |
| On-line, via the Internet..... | 2 | Taking the Examination by Computer..... | 5 |
| Telephone..... | 2 | Identification Screen | 5 |
| Rescheduling/Canceling an Examination | 3 | Tutorial..... | 5 |
| Missed Appointment or Late Cancellation | 3 | Test Question Screen | 5 |
| Special Examination Arrangements..... | 3 | Examination Review | 5 |
| Emergency Examination Center Closing | 3 | Score Reporting | 5 |
| Examination Site Location..... | 3 | Duplicate Score Reports..... | 5 |
| Reporting to the Examination Site | 4 | Examination Information | 6 |

Please refer to our website to check for the most updated information at www.psiexams.com

GUIDELINES FOR EXAMINATION QUALIFICATION

HOW TO OBTAIN A LICENSE

1. Request the exam application from:

Oregon Board of Tax Practitioners
3218 Pringle Rd SE Ste. 250
Salem, OR 97302-6310
Office: (503) 378-4034
Fax: (503) 585-5797
Email: tax.bd@oregon.gov

https://www.oregon.gov/obtp/Documents/general_information_booklet.pdf

You must submit a \$60 application fee with your application to the Board.

2. Once the Board has approved you for the examination, you will receive an approval notice. This notification will also be submitted to PSI.

EXAMINATION PAYMENT AND SCHEDULING PROCEDURES

Upon approval of exam eligibility, the Board will e-mail you an approval notice. It is your responsibility to contact PSI to pay for and schedule the examination.

Your eligibility is good for 60 days from date of approval by the Board. If you fail the exam, you may retest an unlimited number of times during the 60-day period. If you do not pass within 60 days, you must re-apply with the Board.

| Exam | Fee |
|---------------------------------|---------|
| Tax Preparer | \$50.00 |
| Tax Consultant - State Law Only | \$85.00 |
| Tax Consultants | \$85.00 |

NOTE: EXAMINATION FEES ARE NOT REFUNDABLE OR TRANSFERABLE.

ON-LINE (WWW.PSIEXAMS.COM)

For the fastest and most convenient examination scheduling process, PSI recommends that you register for your examinations using the Internet. You register online by accessing PSI's registration website at www.psiexams.com. Internet registration is available 24 hours a day.

1. Log onto PSI's website and create an account. Please enter your email address and first and last name. This information must match exactly with the information the Board has on file. Be sure to **check the box next to "Check here to attempt to locate existing records for you in the system"**.
2. You will be asked to select the examination and enter the ID# provided by the Board. Your record will be found and you will now be ready to pay and schedule for the exam. Enter your zip code and a list of the testing sites closest to you will appear. Once you select the desired test site, available dates will appear. If you have problems, contact PSI at (800) 733-9267 for help.

TELEPHONE

Call (800) 733-9267, PSI registrars are available to receive payment and to schedule your appointment for the examination.

To register by phone, you need a valid credit card (VISA, MasterCard, American Express or Discover.)

| | Monday-Friday | Saturday-Sunday |
|---------------|-----------------|-----------------|
| Eastern Time | 8:00am - 8:00pm | 9:00am - 5:30pm |
| Central Time | 7:00am - 7:00pm | 8:00am - 4:30pm |
| Mountain Time | 6:00am - 6:00pm | 7:00am - 3:30pm |
| Pacific Time | 5:00am - 5:00pm | 6:00am - 2:30pm |



RESCHEDULING/CANCELING AN EXAMINATION APPOINTMENT

You may cancel and reschedule an examination appointment without forfeiting your fee if your *cancellation notice is received 2 days before the scheduled examination date*. For example, for a Monday appointment, the cancellation notice would need to be received on the previous Saturday. You may reschedule online at www.psiexams.com or call PSI at (800) 733-9267.

Note: A voice mail message is not an acceptable form of cancellation. Please use the PSI Website or call PSI and speak directly to a Customer Service Representative

MISSED APPOINTMENT OR LATE CANCELLATION

If you miss your appointment, you will not be able to take the examination as scheduled, further you will forfeit your examination fee, if you:

- Do not cancel your appointment 2 days before the scheduled examination date;
- Do not appear for your examination appointment;
- Arrive after examination start time;
- Do not present proper identification when you arrive for the examination.

SPECIAL EXAMINATION ARRANGEMENTS (ADA)

All examination centers are equipped to provide access in accordance with the Americans with Disabilities Act (ADA) of 1990, and every reasonable accommodation will be made in meeting a candidate's needs. Candidates who require special accommodations will need to complete the necessary forms prior to registering for an exam with PSI. Please contact the board office for more information.

EXAMINATION SITE CLOSING FOR AN EMERGENCY

In the event that severe weather or another emergency forces the closure of an examination site on a scheduled examination date, your examination will be rescheduled. PSI personnel will attempt to contact you in this situation via telephone and email. However, you may check the status of your examination schedule by calling (800) 733-9267. Every effort will be made to reschedule your examination at a convenient time as soon as possible. You will not be penalized. You will be rescheduled at no additional charge.

EXAMINATION SITE LOCATIONS

Aurora Aviation

22785 Airport Rd NE, Blue Gate #5
Aurora, OR 97002

Baker City

2101 Main Street, #203
Baker City, OR 97814

Bend

325 NW Vermont Pl, #106
Bend, OR 97701

Eugene

1955 Empire Park Drive, Suite A
Eugene, OR 97402

Independence

4901 Airport Rd
Independence State Airport
Independence, OR 97351

Medford

1236 A North Riverside Ave
Medford, OR 97501

Portland

205 Business Center, Suite 258
8383 NE Sandy Blvd
Portland, OR 97220



Wilsonville
25195 SW Parkway Ave
Suite 105
Wilsonville, OR 97070

Additionally, PSI has examination centers in many other regions across the United States. You may take this examination at any of these locations.

REPORTING TO THE EXAMINATION SITE

On the day of the examination, you should arrive 30 minutes before your appointment. This extra time is for sign-in, identification, and familiarizing you with the examination process. *If you arrive late, you may not be admitted to the examination site and you will forfeit your examination registration fee.*

REQUIRED IDENTIFICATION

Candidates need to provide one (1) form of identification.

Candidates must register for the exam with their LEGAL first and last name as it appears on their government issued identification. The required identification below must match the first and last name under which the candidate is registered. Candidates are required to bring one (1) form of a valid (non-expired) signature bearing identification to the test site.

REQUIRED IDENTIFICATION (with photo) - Choose One

- State issued driver's license
- State issued identification card
- US Government Issued Passport
- US Government Issued Military Identification Card
- US Government Issued Alien Registration Card
- Canadian Government Issued ID

NOTE: ID must contain candidate's photo, be valid and unexpired.

SECURITY PROCEDURES

The following security procedures apply during examinations:

- You will have access to an online calculator.
or
- A non-programmable calculator that is silent, battery-operated, does not have paper tape printing capabilities, and does not have a keyboard containing the alphabet will be allowed in the examination site.
- You will be given a piece of scratch paper and a pencil. These will be returned to the proctor at the end of your examination.
- Candidates may only take approved items into the examination room.
- All personal belongings of candidates, with the exception of close-fitting jackets or sweatshirts, should be placed in the secure storage provided at each site prior to entering the examination room. Personal belongings **include, but are not limited to**, the following items:
 - **Electronic devices of any type**, including cellular / mobile phones, recording devices, electronic watches, cameras, pagers, laptop computers, tablet computers (e.g., iPads), music players (e.g., iPods), smart watches, radios, or electronic games.
 - **Bulky or loose clothing or coats** that could be used to conceal recording devices or notes, including coats, shawls, hooded clothing, heavy jackets, or overcoats.
 - **Hats or headgear not worn for religious reasons** or as religious apparel, including hats, baseball caps, or visors.
 - **Other personal items**, including purses, notebooks, reference or reading material, briefcases, backpacks, wallets, pens, pencils, other writing devices, food, drinks, and good luck items.
- Person(s) accompanying an examination candidate may not wait in the examination center, inside the building or on the building's property. This applies to guests of any nature, including drivers, children, friends, family, colleagues or instructors.
- No smoking, eating, or drinking is allowed in the examination center.
- During the check in process, all candidates will be asked if they possess any prohibited items. Candidates may also be asked to empty their pockets and turn them out for the proctor to ensure they are empty.
The proctor may also ask candidates to lift up the ends of their sleeves and the bottoms of their pant legs to ensure that notes or recording devices are not being hidden there.
- Proctors will also carefully inspect eyeglass frames, tie tacks, or any other apparel that could be used to harbor a recording device. Proctors will ask to inspect any such items in candidates' pockets.
- If prohibited items are found during check-in, candidates shall put them in the provided secure storage or return these items to their vehicle. PSI will not be responsible for the security of any personal belongings or prohibited items.
- Any candidate possessing prohibited items in the examination room shall immediately have his or her test results invalidated, and PSI shall notify the examination sponsor of the occurrence.



- Any candidate seen giving or receiving assistance on an examination, found with unauthorized materials, or who violates any security regulations will be asked to surrender all examination materials and to leave the examination center. All such instances will be reported to the examination sponsor.
- Copying or communicating examination content is violation of a candidate's contract with PSI, and federal and state law. Either may result in the disqualification of examination results and may lead to legal action.
- Once candidates have been seated and the examination begins, they may leave the examination room only to use the restroom, and only after obtaining permission from the proctor. Candidate will not receive extra time to complete the examination.

TAKING THE EXAMINATION BY COMPUTER

The examination will be administered via computer. You will be using a mouse and computer keyboard.

IDENTIFICATION SCREEN

You will be directed to a semiprivate testing station to take the examination. When you are seated at the testing station, you will be prompted to confirm your name, identification number, and the examination for which you are registered.

TUTORIAL

Before you start your examination, an introductory tutorial is provided on the computer screen. The time you spend on this tutorial, up to 15 minutes, DOES NOT count as part of your examination time. Sample questions are included following the tutorial so that you may practice answering questions, and reviewing your answers.

TEST QUESTION SCREEN

The "function bar" at the top of the test question screen provides mouse-click access to the features available while taking the examination.



The screenshot shows a web-based test interface. At the top is a 'function bar' with icons for Mark, Comments, Goto, Help, and End. Below this is a status bar showing 'Question: 3 of 40', 'Answered: 2', 'Unanswered: 1', 'Marked: 0', 'View All', and 'Time Left/Min: 359'. The main question area displays: '3. What do the stars on the United States of America's flag represent?'. Below the question is a prompt '(Choose from the following options)' and four radio button options: '1. Presidents', '2. Colonies', '3. States', and '4. Wars'. At the bottom are '<< Back' and 'Next >>' buttons.

One question appears on the screen at a time. During the examination, minutes remaining will be displayed at the top of the screen and updated as you record your answers.

IMPORTANT: After you have entered your responses, you will later be able to return to any question(s) and change your response, provided the examination time has not run out.

EXAMINATION REVIEW

PSI, in cooperation with the Board, will be consistently evaluating the examinations being administered to ensure that the examinations accurately measure competency in the required knowledge areas. While taking the examination, examinees will have the opportunity to provide comments on any questions, by using the clicking the Comments link on the function bar of the test question screen.

These comments will be analyzed by PSI examination development staff. PSI does not respond to individuals regarding these comments, all substantive comments are reviewed. **This is the only review of examination materials available to candidates.**

SCORE REPORTING

Your score will be given to you immediately following completion of the examination. The following summary describes the score reporting process:

- If you pass, you will receive a successful score report.
- If you do not pass, you will receive a diagnostic report indicating your strengths and weaknesses by examination type on the score report.

DUPLICATE SCORE REPORTS

You may request a duplicate score report after your examination by emailing scorereport@psionline.com or by calling 800-733-9267.



EXAMINATION INFORMATION

TAX PREPARER EXAMINATION

| # of Questions | Minimum Passing Score | Time Allowed |
|----------------|-----------------------|--------------|
| 163 | 75% correct | 240 Minutes |

The examination is OPEN BOOK. The following reference material is allowed in the examination site:

FEDERAL

- Publication 17 - Your Federal Income Tax
- Publication 850 - English/Foreign Language Glossary of Tax Words and Phrases
- Publication 974 - Premium Tax Credit (*new addition to source document list*)
- Instructions for Form 1040 (instructions only - no forms or other booklets are allowed)

OREGON

- Publication OR-17 - Oregon Individual Income Tax Guide
- Publication - Oregon Income Tax Full-Year Resident, including:
 - ♦ Forms OR-40 and OR-40-V
 - ♦ Schedules OR-ASC, OR-ADD-DEP, OR-529 and OR-DONATE
- Publication - Oregon Income Tax Part-Year Resident/Nonresident, including:
 - ♦ Schedules OR-ASC-NP, OR-ADD-DEP, OR-529 and OR-DONATE
- Oregon Administrative Rules, Chapter 800
 - ♦ Divisions 800-010-0015 through 800-030-0050
- Oregon Revised Statutes, Chapter 673
 - ♦ Sections 673.605 through 673.990

Following are the links to the Board website where all exam candidates can download the **2017 Tax Law Reference Sheet** and Preparer-only exam candidates can download the **2017 forms booklet**. Candidates scheduling for an OR Tax test should download reference documents as stated for their specific exams from the states' website and **bring to the test site on the day of testing**.

From our website home page:

<https://www.oregon.gov/OBTP/Pages/index.aspx>

From the link on the home page:

<https://www.oregon.gov/obtp/Pages/ApplyForExam.aspx>

The reference sheet can be found in the General Information Booklet on pages 21-29:

https://www.oregon.gov/obtp/Documents/2018_GIB_FINAL.pdf

Source documents in languages other than English are acceptable. Only official publications or printouts from the IRS or the Oregon Department of Revenue websites are allowed. Printed materials may be single sided or doubled sided however additional blank pages are not allowed. Only non-removable tabs are allowed, source documents may contain highlighting or handwritten notes, Source materials may be secured in a binder, but separate divider pages are not allowed. Loose source documents must be in a Clear container. Backpacks or other types of bags other than clear are not allowed.

Candidates are responsible for bringing their own references to the examination center. You may not borrow, share, or lend source documents to other examinees during the exam. Any candidate caught writing, highlighting, underlining and/or indexing in the references during the examination will be reported to the Board.

TAX CONSULTANT - STATE LAW ONLY EXAMINATION

| # of Questions | Minimum Passing Score | Time Allowed |
|----------------|-----------------------|--------------|
| 50 | 75% correct | 90 Minutes |

The examination is **CLOSED BOOK**.

The only document candidates may bring into the Consultant State Only examination is IRS Publication 850 English (Foreign Language) Glossary of Words and Phrases. Only an official copy or a printout out from the IRS website will be allowed.

Publication 850 English (Foreign Language) Glossary of Words and Phrases must be unmarked, meaning no highlighting, underlining, writing and/or indexing may exist in the reference, tabs are not allowed. Any candidate caught writing, highlighting, underlining and/or indexing in the references during the examination will be reported to the Board.

TAX CONSULTANTS EXAMINATION

| # of Questions | Minimum Passing Score | Time Allowed |
|----------------|-----------------------|--------------|
| 200 | 75% correct | 300 Minutes |

The examination is **CLOSED BOOK**.

The only document candidates may bring into the Consultant examination is IRS Publication 850 English (Foreign Language) Glossary of Words and Phrases. Only an official copy or a printout out from the IRS website will be allowed.

Publication 850 English (Foreign Language) Glossary of Words and Phrases must be unmarked, meaning no highlighting, underlining, writing and/or indexing may exist in the reference, tabs are not allowed. Any candidate caught writing, highlighting, underlining and/or indexing in the references during the examination will be reported to the Board.

PSI Services LLC
3210 E Tropicana
Las Vegas, NV 89121

