

FIRM - ONLINE RENEWAL INSTRUCTIONS

GETTING STARTED:

- Go to www.oklahoma.gov/oab and click on the **Online Services** link found on the center menu bar of the OAB homepage.



OKLAHOMA
Accountancy Board



Search

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To Safeguard the Public Welfare Through the Regulation of Public Accounting

- Online Services
DISCOVER HERE >
- Licensee Lookup
CPA SEARCH >
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MINUTES AND AGENDAS >

- Next, click the link to the **Registrant Portal**.



Welcome to the Oklahoma Accountancy Board

<p>Applicant / Candidate Portal</p> <p>Apply for:</p> <ul style="list-style-type: none"> Criminal History Review Qualification for eligibility Exam credit transfer Exam sections Initial Certification Initial Firm Certification Reciprocal Certificate Reinstatement <p>Applicant Portal</p>	<p>Registrant Portal</p> <p>Registrant self-service:</p> <ul style="list-style-type: none"> Renew your Certificate Report CPE Update account settings Request Documents Report Status Changes Interim Permit Firm Renewal <p>Registrant Portal</p>	<p>File a Complaint</p> <p>File a complaint on an individual PA, CPA, and/or public accounting firm.</p> <p>Complaint Portal</p>	<p>Licensee Lookup</p> <p>Search For:</p> <ul style="list-style-type: none"> Individual licenses and public accounting firms <p>License Lookup</p>
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If you require further assistance, contact the OAB by telephone, e-mail or mail at:

Oklahoma Accountancy Board
201 N.W. 63rd Street, Suite 210
Oklahoma City, OK 73116
Telephone: (405) 521-2397
Fax: (405) 521-3118
E-mail: okaccybd@oab.ok.gov

ACCOUNT ACTIVATION:

- The OAB launched a new licensing system and all first-time users to the portal must activate their account. Click **activate now** and follow the prompts to activate your OAB firm account. If you need help, use the Account Activation Instructions found on the OAB homepage at www.ok.gov/oab



Registrant Portal

E-mail

Password

Sign In Forgot Password

New to this site? [Activate now](#)

LOGGING IN:

- Once the firm's account is active, log in using the firm's designated licensee's **email address and password**, and click **Sign In**



Registrant Portal

E-mail

Password

Sign In Forgot Password

New to this site? [Activate now](#)

FIRM RENEWAL:

- On the left side of the Dashboard, click on **Firm Renewal**.

Dashboard

Registrant

- Personal Information
- Employment Information
- Pocket Card
- Continuing Professional Education
- Registrant Renewal

Applications & Requests

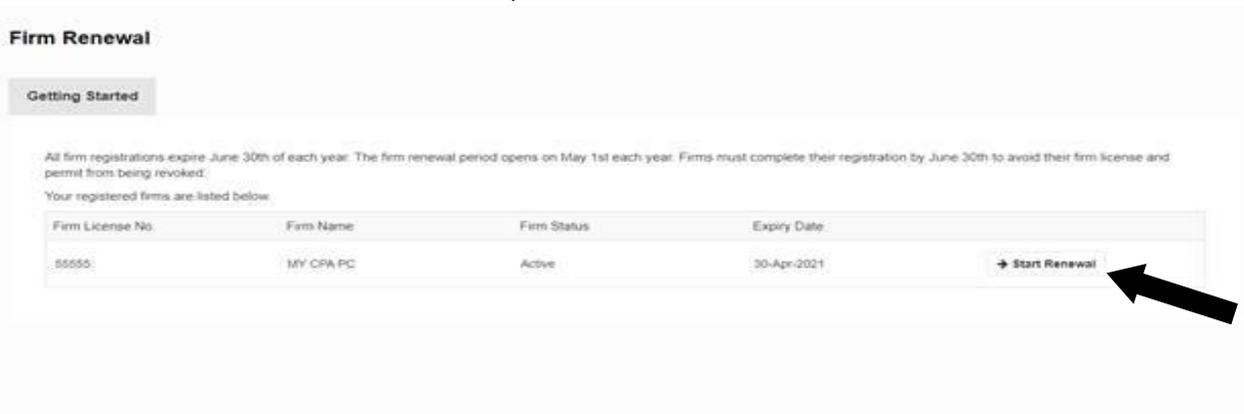
- Document Request
- Name Change Request
- CPE Exemption Request
- CPA/PA Certificate Status Change Request
- Interim Permit Application

Firms

- Firm Information
- Controlling Persons
- Firm Offices
- Document Request
- Interim Government Audit Application
- Firm Renewal**

Invoices & Receipts

- At the bottom of the Firm Renewal screen, click **Start Renewal**.



STEP 1 - APPLICATION INSTRUCTIONS

- The application for **Firm Renewal** contains 11 steps. After reading the Application Instructions, click **Save & Continue**.

Firm Renewal

1 Application Instructions Step 1 of 11

Important: Please read the following application instructions closely.

Instructions for **Firm Renewal**
To register your firm with the Oklahoma Accountancy Board and renew a firm permit to practice public accounting, you must complete the firm renewal process and submit payment between May 1st and June 30th of each year.

Documents to be Submitted

You may be required to upload a high quality image or PDF of the following documents to complete and submit this application.

Peer Review Enrollment Confirmation - If your firm has enrolled in an OAB approved peer review program, you will need to upload proof in the Supporting Documents section of this application (if not previously provided).

Peer Review Reports - If your firm has done peer review, you will need to upload your most recent peer review reports in the Supporting Documents section of this application (if not previously provided)

Declarations - You will be asked to upload additional documentation relating to any "yes" responses in the Declaration section of this application.

[< Previous](#) [Save & Continue >](#)

STEP 2 – PERSONAL INFORMATION

- Enter or update personal information.

Firm Renewal

2 Personal Information Step 2 of 11

Note: All information with a * is required information.

Mailing Address

Street Address *

Street Address 2

City *

Country *

State / Province *

ZIP Code *

Enter or update contact information. Click **Save & Continue.**

Contact Information

Daytime Telephone *

Home Telephone

Primary E-mail *

* Your e-mail address will be used for communications with the Board, which may include personal and confidential information. Your email address must be private and accessible only by you.

Note: The email address you enter here will become your Login ID.

STEP 3 – FIRM INFORMATION

You can edit, update or add firm information.

Firm Renewal

3 Edit Firm Information Step 3 of 11

Note: All information with a * is required information.

Firm Information

Name of Firm *

Must be exactly as shown on the Professional Certificate Issued by the Oklahoma Secretary of State. Out of state Non-incorporated Sole Proprietors are not required to register with the Oklahoma Secretary of State.

Title 18, Chapter 16, Section 807, of the Oklahoma Statutes states: "The name of every professional entity shall end with one or more of the words or abbreviations permitted in the applicable associated acts, provided, that such words or abbreviations shall be modified by the word "professional" or some abbreviation of the combination including, without limitation, "P.C.", "P.L.P.", or "P.L.L.C.". Provided further, each of the regulating boards may by rule adopt further requirements as to the names of professional entities organized to render professional services within the jurisdiction of such regulating board. Title 18 allows out-of-state firms to register as the same type of firm in Oklahoma as they are registered in their home state (i.e. LLC, LLP, etc)."

FEIN *

Type of Firm *

Type of Entity *

Type of Registration * IN-STATE OUT-OF-STATE

Firm's Physical Address

Street Address *

City *

State *

ZIP Code *

Is your physical address different from your mailing address? Yes No

By selecting "Yes", you agree to have ALL CORRESPONDENCE, INCLUDING RENEWAL NOTICES, sent to the mailing address below.

Contact Information

Office Telephone No. *

Fax No.

Business Email *

Non-CPA owners that are residing in Oklahoma:
Any non-CPA owners that are residing in Oklahoma will be mailed a separate individual registration form between May 1st and June 30th.

List the total number of CPA/PAs on staff:
CPAs/PAs that are owners of the firm should be included in this total.

Ownership

Percentage of ownership held by CPA's *

If the firm has ownership or affiliation with another public accounting firm, please indicate below.

Please list all non-CPA owners that are residing in Oklahoma, if any. All the names listed below must be registered with the OAB.

Last Name	First Name	Email	Status
Bills	Dollar	oab12@mailinator.com	Active

+ Add New

CPA/PA Services

List the total number of CPA/PAs on staff *

Date the firm will begin providing services to Oklahoma Clients *

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Save & Continue >

STEP 4 – FIRM OFFICES

- The *Designated Manager* of any Firm Office located in Oklahoma must have an *individual Oklahoma CPA certificate and permit to practice*.**

Firm Renewal

4 Firm Offices Step 4 of 11

Please list each office of the firm located in Oklahoma or doing business in Oklahoma.
To add or update a firm office, please visit the [Firm Offices](#) page at the left navigation menu.

Street Address	City	State	ZIP Code	Designated Manager	Status	Govt Audit
56	Fake	Oregon	44566	Beam Jim	Active	No
22 Test Way	Fake	Oklahoma	78955	Joe Test (000017R)	Active	No

< Previous Save & Continue >

STEP 5 – CONTROLLING PERSONS

- List any owners who are a resident of Oklahoma.

Firm Renewal

5 Controlling Persons Step 5 of 11

Please list the names of all officers, directors and shareholders/members (owners) who are a resident of Oklahoma.
To add or update a controlling person, please visit the [Controlling Persons](#) page at the left navigation menu.

Last Name	First Name	Role	OK CPA Certificate No.	Status
Bob	Billy	Director		Active

< Previous Save & Continue >

STEP 6 – ACCOUNTING SERVICES

List any services the firm provided or intends to provide. Click **Save & Continue**.

Firm Renewal

6 Accounting Services Step 6 of 11

Please indicate all types of work which the entity is engaged in or intends to be engaged in by checking all that apply.

<input type="checkbox"/> Agreed upon procedures	<input type="checkbox"/> Investment Services
<input type="checkbox"/> Audits	<input type="checkbox"/> Litigation Support Services
<input type="checkbox"/> Bookkeeping Services	<input type="checkbox"/> Management Advisory Services
<input type="checkbox"/> Compilations	<input type="checkbox"/> Reviews
<input type="checkbox"/> Consulting Services	<input type="checkbox"/> Tax Planning Services
<input type="checkbox"/> Financial Planning	<input type="checkbox"/> Tax Return Preparation
<input type="checkbox"/> Other Accounting Services (Please describe below)	

[< Previous](#) **Save & Continue >**

STEP 7 – PEER REVIEW INFORMATION

Firm Renewal

7 Peer Review Information Step 7 of 11

Note: All information with a * is required information.

Did your firm perform an attestation engagement last year? (i.e. Audit, Review, Agreed Upon Procedure) * Yes No

Did your firm perform a compilation last year? * Yes No

Note: Individual compilation CPE requirements may apply if the firm is not enrolled in a peer review program.

[< Previous](#) **Save & Continue >**

Note: All information with a * is required information.

Did your firm perform an attestation engagement last year? (i.e. Audit, Review, Agreed Upon Procedure) * Yes No

Note: The firm is required to participate in a Board-approved administering entity's peer review program.

Did your firm perform an audit of an Oklahoma government entity last year? * Yes No

Did your firm perform a compilation last year? * Yes No

Is your firm currently enrolled in a Board approved administering entity's peer review program? * Yes No

AICPA Firm Number *

987654

Current Peer Review Year End *

2022

Important: Enrollment in an OAB approved peer review program is required within 12 months of performing initial audit, review or agreed upon procedure engagement.

Please note that the peer reviews must be submitted by secure means and include:

Pass Reports

- Peer Review Report
- Final Letter of Acceptance from the Sponsoring Organization

Pass with Deficiencies or Fail Reports

- Peer Review Report
- Letter of Comments
- Letter of Response
- Signed Agreement to the Conditional
- Letter of Acceptance
- Final Letter of Acceptance from the Sponsoring Organization
- \$100 Peer Review Report Fee

Note: Individual compilation CPE requirements may apply if the firm is not enrolled in a peer review program.

- Select Yes/No if the Firm performed any attestation engagements last year (Audit, Review, Agreed Upon Procedure). If Yes, the Firm is required to participate in a peer review program. See OAB 10:15-33
- If the Firm answered Yes to attest engagements, a question will appear to indicate if the Firm performed an Audit of an Oklahoma governmental entity (Yellow Book) last year. Firms must attest to being compliant with the Yellow Book CPE prior to engaging in an Audit of an Oklahoma governmental Entity. See OAC 10:15-43
- Select Yes/No if the Firm performed a Compilation engagement last year. Firms whose highest level of engagement is a Compilation may opt to earn 4 hours of qualifying CPE annually in lieu of enrolling in a peer review program. See OAC 10:15-30-5(i)
- If the Firm answered Yes to performing attest engagements, the firm must indicate if they are enrolled in a peer review program. If Yes, the firm must provide their AICPA firm number to verify enrollment. If No, a question will appear where the firm must provide the date of their initial attestation engagement. Firms must enroll in a peer review program within 12 months of the initial attest engagement date. See OAC 10:15-33-4

STEP 8 – SUPPORTING DOCUMENTS

- If not previously provided, the firm must upload a copy of their most recent peer review accepted by their sponsoring organization and click **Save & continue.**

Firm Renewal

8 Supporting Documents Step 8 of 11

Note: Please provide all the necessary supporting documents.

Peer Review Enrollment Confirmation

Please upload confirmation of your enrollment in a peer review program, if not previously provided (if applicable) Upload File

Peer Review Report

Please upload your most recent peer review, if not previously provided (if applicable) Upload File

< Previous Save & Continue >

STEP 9 - DECLARATIONS:

- If an answer is provided that requires an explanation, the explanation must be entered before proceeding to the next step.

*** The OAB may follow up for further information/documentation on any declaration.**

When finished, click **Save & Continue.**

Firm Renewal

9 Declarations Step 9 of 11

Note: All information with a * is required information.

- Does every CPA and FA on your staff, who practices in Oklahoma or serves Oklahoma clients, hold a valid Oklahoma permit to practice or practice through mobility? * Yes No
- Since the firm's previous registration has the firm or any partner/shareholder/member/owner of the firm had a permit or its equivalent denied, revoked or suspended from practice by any Federal or State regulatory authority or foreign country or are any charges or investigations pending at this time? * Yes No
- Do any Non-CPA owners reside in Oklahoma? * Yes No

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STEP 10 – ATTESTATION

- Complete the attestation and click

Firm Renewal

10 Attestation Step 10 of 11

I attest that all of the information I have provided on this form is true and correct. I further attest that all certified or licensed persons employed by the firm who practice public accounting in Oklahoma (i.e. work on client records) or enter Oklahoma from another state to serve clients hold an Oklahoma CPA certificate or PA license and a valid individual Permit to Practice Public Accounting issued by the OAB unless entering Oklahoma under mobility.

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STEP 11 - PAYMENT

- To submit a payment, choose your payment method – **credit card, check, or money order.**

Firm Renewal

11 Payment Step 11 of 11

Fee Breakdown

Invoice Item	Amount
Firm Permit Fee	\$125.00
Firm Registration Fee	\$75.00
Total	\$200.00

Method of Payment

Please select method of payment.

Method of Payment *  Credit Card

- If submitting payment by *credit card, complete payment information and click **Process Payment** to continue. *Unfortunately, our system does not accept American Express.

Method of Payment

Please select method of payment.

Method of Payment *

Credit Card Payment

Accepted Payment Methods: MasterCard, Visa and Discover

Enter the required information in the following fields and click Process Payment to complete your payment. Your fees will be processed securely online.

Amount Due

Cardholder Name *

Credit Card Number *

Expiration Date *

Security Code (3 digits on back of card) *

Important: Please make sure to click the Process Payment button only once. It may take up to several minutes to process your credit card payment. Thank you for your patience.

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[Process Payment >](#)

- If submitting payment by check or money order, please make payable to OAB and send to:**
Oklahoma Accountancy Board
201 NW 63rd St., Ste. 210
Oklahoma City, OK 73116

Method of Payment

Please select method of payment.

Method of Payment *

Check Payment

Enter the check details below then mail or deliver your payment directly to the OAB:

Amount Due

Oklahoma Accountancy Board
201 NW 63rd Street, Suite 210
Oklahoma City, Oklahoma 73116

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[Pay by Check >](#)

SUBMISSION CONFIRMATION:

- When you have completed all of the steps of the Firm Renewal and it has been successfully received, you will received a Submitted confirmation screen, as well as a confirmation email.**



Thank you for completing your firm renewal. If you have questions about your application, you may call us at (405) 521-2397 or email us at okaccybd@oab.ok.gov.
For payments, please visit the [Invoices & Receipts](#) section on the menu.

COPY OF FIRM PERMIT:

- To access a copy of your renewed license or permit, you will need to click on the **Firm Information** link on your dashboard.



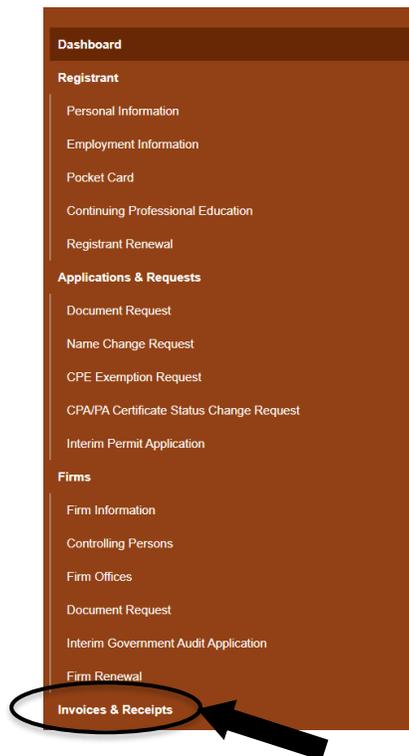
- You will then click on **Download Permit**.

License No.	Permit No.
55555	N/A

License Status	Permit Status	Effective Date	Expiry Date	Govt Audit Effective Date	Govt Audit Expiry Date	
Active	N/A	01-Jul-2010	30-Apr-2021	N/A	N/A	

PRINTING RECEIPTS:

- To print a copy of your receipt, you will need to click on the **Invoices and Receipts** link on your dashboard.



- If the invoice has been paid, click on **Review** to open the receipt, and print it.

If the invoice has not been paid, click **Review and Pay** to pay the invoice.



John Doe Test [Logout](#)

- Dashboard
- Registrant
 - Personal Information
 - Employment Information
 - Pocket Card
 - Continuing Professional Education
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- Applications & Requests
 - Document Request
 - Name Change Request
 - CPE Status Change & Exemption Request
 - CPA/PA Certificate Status Change Request
 - Interim Permit Application
- Invoices & Receipts**
- Account Settings

Invoices & Receipts

To review paid invoices, click "Review". To review and pay any outstanding invoices, click "Review & Pay".

Invoice #	Issued To	Issued Date	Due Date	Amount Paid	Balance Due	
002819	John Doe Test	03/09/2021	N/A	\$0.00	\$275.00	Review & Pay

