

INDIVIDUAL CPA & PA - ONLINE RENEWAL INSTRUCTIONS



IMPORTANT
Please Read
Before You Continue



OKLAHOMA
Accountancy Board

Please be advised, all registrants are required to enter CPE activities into the CPE Dashboard on the Registrant Portal, as this will be the new method for CPE reporting in Oklahoma.

This data will automatically transfer to your Registration Renewal. Your annual Registration Renewal will be marked insufficient without reporting CPE or selecting a CPE Exemption (if applicable).

**** Your CPE must be reported in the CPE module before beginning your Registration Renewal.**

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.

The screenshot shows the Oklahoma Accountancy Board website. At the top, there is a green header with the OAB logo on the left, a search bar on the right, and a navigation menu in the center. The navigation menu includes links for Online Services, Examination, Licensing, CPE, Peer Review, About, Forms, and Resources. Below the navigation menu is a large orange banner with the text "To Safeguard the Public Welfare Through the Regulation of Public Accounting". To the right of the banner is a green sidebar with a menu of links: Online Services (with a "DISCOVER HERE >" link), Licensee Lookup (with a "CPA SEARCH >" link), and About the Board (with a "MINUTES AND AGENDAS >" link). Two black arrows point from the "Online Services" link in the navigation menu to the "Online Services" link in the sidebar.

- 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 <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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ACTIVATING ACCOUNT:

- If you have not activated your account yet, please refer to the separate Account Activation Instructions.

LOGGING IN:

- Enter your **email address and password**, and click **Sign In**.



Registrant Portal

Sign In **Forgot Password**

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



REGISTRANT DASHBOARD:

- Once logged in, you will see the Registrant Dashboard screen. Within your Dashboard options, click **Registrant Renewal** under the Registrant heading.

Dashboard

Registrant

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

Dashboard

Registrant Information

Legal Last Name <input type="text" value="Doe Test"/>	Legal First Name <input type="text" value="John"/>	Legal Middle Name <input type="text" value="P"/>
Phone Number <input type="text" value="(405) 522-3090"/>	E-mail Address <input type="text"/>	Name on Certificate <input type="text" value="John P. Doe Test"/>

Registration / Licensure Information

Certificate/License No. <input type="text" value="9999999"/>	License Type <input type="text" value="Certified Public Accountant (CPA)"/>	License Status <input type="text" value="Active"/>
Registrant Since <input type="text" value="01-May-2020"/>	Effective Date <input type="text" value="01-May-2020"/>	Expiration Date <input type="text" value="30-Apr-2021"/>

At the bottom of the Registrant Renewal screen, click Start Renewal

Getting Started

This section is for application involving renewals. Please follow the step-by-step instructions to complete your application. You will be able to save your progress and return to it later.

All registrants are required to renew their CPA certificate or PA license and permit (if applicable) each year. Registration is the open the month prior to your birth month, during your birth month, and the month immediately following (lapsed period). Failure to renew will result in the automatic revocation of your certificate/license and permit (if applicable).

For assistance, please contact okaccybd@oab.ok.gov or call (405) 521-2397

Your license & registration information is listed below.

License Type	Certificate / License Number	Status	Expiry Date	Renewal
Certified Public Accountant (CPA)	9999999	Active	07/31/2022	Start Renewal

REGISTRATION RENEWAL:

APPLICATIONS INSTRUCTIONS

The application for **Registration Renewal** contains 9 or 10 steps based on whether you are in public practice or industry. After reading the Application Instructions, click Save & Continue.

Important: Please read the following application instructions closely.

Instructions for Registrant Renewal

All registrants are required to renew their CPA certificate or PA license and permit (if applicable) each year. Registration is open the month prior to your birth month, during your birth-month, and the month immediately following (lapsed period). Failure to renew will result in the automatic revocation of your certificate/license and permit (if applicable).

ALL REGISTRANTS ARE REQUIRED TO LOG THEIR CPE HOURS IN THE CONTINUING PROFESSIONAL EDUCATION MENU (CPE TRACKER), UNLESS AN EXEMPTION IS CLAIMED. PLEASE REFERENCE THE CPE LOGGING INSTRUCTIONS ON OUR WEBSITE AND LOG CPE HOURS BEFORE COMPLETING YOUR REGISTRATION.

PERSONAL INFORMATION

- Enter or update personal information.

EMPLOYMENT INFORMATION

- You can edit, update or add employment information by clicking on the **Employment Information** button. It will direct you to the Dashboard where you will edit or add your employment. You will then need to click on **Registration Renewal** on the dashboard menu to direct you back to your Registration Renewal. Click **Save & Continue**.

If you are *not employed*, please make sure that your employment information is left blank.

Registrant Renewal

3 Employment Information Step 3 of 12

Below is your employment history.
To add or update your employment, please visit the **Employment Information** page in the left navigation menu.

Employer Name	City	Role	Accounting Related	Start Date	End Date	Status
No employment records have been added. Click Add New to add a new record.						

< Previous Save & Continue >

CPE REPORTING INFORMATION

- Your CPE reporting method will be completed in this section. You will not input hours in this section. Your hours will be automatically transferred when you enter your CPE activities into the CPE Dashboard. Click **Save & Continue**.

- **Please be advised, all registrants are required to enter CPE activities into the CPE Dashboard, as this will be the new method for CPE reporting in Oklahoma.**
- **Your annual Registration Renewal will be marked insufficient without reporting CPE or selecting a CPE Exemption (if applicable).**

- **** You must enter your prior year CPE in the CPE Dashboard BEFORE completing your Registration Renewal to avoid any delays.**

4 CPE Reporting Information

Step 4 of 10

Please select one of the options below *

- Yes No I have completed continuing professional education (CPE) credits for the previous year.
- Yes No I certify and affirm that I am exempted from the continuing professional education for the previous year since my CPE exemption was approved for the following reason.

< Previous

Save & Continue >

PEER REVIEW INFORMATION

This section is only for sole proprietors who are not incorporated and will not appear for registrants in industry.

5 Peer Review Information

Step 5 of 10

Note: This section is only for sole proprietors who are not incorporated.

Are you a sole proprietor who is not incorporated? * Yes No

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

Note: You are required to participate in a Board-approved administering entity's peer review program.

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

Select Yes/No if you performed any attestation engagements last year (Audit, Review, Agreed Upon Procedure). If Yes, you are required to participate in a peer review program See OAC 10:15-33-4

If you answer Yes to attest engagements, a question will appear to indicate if you performed an Audit of an Oklahoma government entity (Yellow Book) last year. Registrants 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 you performed a Compilation engagement last year. Individuals 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 you answered Yes to performing attest engagements, you must indicate if you are enrolled in a peer review program. If Yes, you must provide your AICPA firm number to verify enrollment. If No, a question will appear where you must provide the date of your initial attestation engagement. Registrants must enroll in a peer review program within 12 months of the initial attest engagement date. See OAC 10:15-33-4

If not previously provided, upload a copy of your most recent peer review accepted by your sponsoring organization. See OAC 10:15-33-6

Click **Save & Continue**.

PERMIT TO PRACTICE PUBLIC ACCOUNTING

Select Yes if you are applying for or renewing a permit to practice. Click 

6 Permit to Practice Public Accounting Step 6 of 10

I am filing this renewal in conjunction with an application for a permit to practice * Yes No 

Please select one *

Note: If you are renewing a lapsed permit or applying for an initial permit you must have completed 40 hours of CPE in the previous calendar year or within the last 365 days. Certificates must be submitted in the Supporting Documents section.

Indicate appropriate compliance period *

I have completed the AIPCA's Ethics Examination course entitled "**Professional Ethics: The AICPA's Comprehensive Course**" (with a score of 90% or above) as part of my CPE requirement for the permit for which I am now applying *

UPLOAD SUPPORTING DOCUMENTS:

- Provide all the necessary supporting documents (*only if required*) by uploading the files. **CPE Certificates are required only if applying for an initial or lapsed permit. CPE must be reported in the CPE menu.** Click Upload File to select the document. When finished, click **Save & Continue**.

7 Supporting Documents

Step 7 of 10

Note: Please provide all the necessary supporting documents.

Peer Review Enrollment Confirmation

Please upload your enrollment confirmation in an OAB approved peer review program, if not previously provided.

Upload File

Peer Review Reports

Please upload your most recent peer review reports, if not previously provided

Upload File

DECLARATIONS

- All information with a red asterisk * is required information.

ATTESTATION

- Complete the attestation and click **Save & Continue**.

9 Attestation

Step 9 of 10

- I attest that all the information that I have provided is true and correct. I further understand that I am subject to and will abide by the Oklahoma Accountancy Act, the Board's rules, and the American Institute of Certified Public Accountants' Code of Professional Conduct *

< Previous

Save & Continue >

PAYMENT

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

Registrant Renewal

12 Payment Step 12 of 12

Fee Breakdown

Invoice Item	Amount
Individual Registration Fee - Individuals over 55	\$50.00
Total:	\$50.00

Method of Payment

Please select method of payment.

Method of Payment * Credit Card

Credit Card Payment
Accepted Payment Methods: MasterCard, Visa, American Express and Discover

Enter the required information in the following fields and click Process Payment to complete your payment.

Amount Due: \$50.00

Cardholder Name *

Credit Card Number *

Expiration Date * January 2020

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.

< Previous Process Payment >

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

- 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

CONFIRMATION:

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

Registrant Renewal

 **Submitted**

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

COPY OF LICENSE/PERMIT:

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



John Doe Test [Logout](#)

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