All first-time users to the Oklahoma Accountancy Board Online Services must first contact the Oklahoma Accountancy Board to create log in information. If you have an individual Oklahoma CPA Certificate and a registered firm, you may access the online services using the same credentials.

Using your secure credentials, log in by navigating to the Oklahoma Accountancy Board homepage at https://www.ok.gov/oab_web then click on Online Services.

Once logged in, select your Firm Number under the My Licenses section to open the Renewal Update process.
To register your firm with the Oklahoma Accountancy Board and apply for a firm permit to practice public accounting you **MUST** do the following:

- Enter the names and information for each owner of the firm within the Owners tab by clicking +Add then save after entering each individual; and
- Enter any satellite offices of the firm within the Firm Office Locations tab by clicking +Add then save after entering each location (if applicable); and
- Complete the Renewal Update under Manage Applications to renew your firm registration, apply for a firm permit, and report Peer Review (if applicable). Answer every question on the renewal process and make the appropriate payment.

**NOTE:** Within the **Renewal Update** process, you also have the ability to upload attachments. If you choose to do so, you may instead upload a Word or .pdf document listing the first and last names of all firm owners, their Oklahoma CPA Certificate number or CPA Certificate number from another jurisdiction and if applicable, any non-CPA owners and their state of residence.
Does every CPA and PA on your staff, who practices in Oklahoma or serves Oklahoma clients, hold a valid Oklahoma permit to practice or practice through mobility? Y/N Answer YES if all Certified Public Accountants or Public Accountants employed by the firm hold a current permit to practice public accounting issued by the Oklahoma Accountancy Board or practice under mobility if this is an out-of-state firm.

If previous answer is No, please explain here. You may use the space here to provide an explanation or you may upload a document containing your explanation by using the Upload Attachment function at the bottom of the renewal update.

How many employed CPA/PA(s) on staff (not including contract employees)? – Indicate the total number of Certified Public Accountants or Public Accountants on the firm’s staff including owners.

CPA/PA(s) Ownership % in Firm – Indicate the total percentage of ownership in the firm by Certified Public Accountants/Public Accountants.

Do any Non-CPA/PA owners reside in Oklahoma? Y/N - Answer YES if any owners who are non-Certified Public Accountants reside in Oklahoma.

Since the previous registration has the firm or any partner/shareholder/member/owner of the firm or the firm had a permit or its equivalent denied, revoked or suspended from practice by any Federal or State regulatory authority or foreign country? Y/N – Answer YES only if any owner of the firm has had any permit denied, or revoked suspended by any regulatory authority.
FIRM ONLINE RENEWAL INSTRUCTIONS

• If previous answer is Yes, please explain here. You may use the space here to provide an explanation or you may upload a document containing your explanation by using the Upload Attachment function at the bottom of the renewal update.

• Has there been any change in firm ownership structure not previously reported? Y/N – Answer YES if there has been any change in firm ownership structure not previously reported to the OAB.

• If previous answer is Yes, please explain here – You may use the space here to provide an explanation or you may upload a document containing your explanation by using the Upload Attachment function at the bottom of the renewal update.

• Are there any other public accounting firm(s) with which this firm or any of the listed partners, shareholders, members or owners have ownership or affiliation? Y/N – Answer YES if this firm or any of its partners, shareholders, members, or owners have ownership or affiliation with another firm.

• If previous answer is Yes, please explain here – You may use the space here to provide an explanation or you may upload a document containing your explanation by using the Upload Attachment function at the bottom of the renewal update.

Peer Review – Firms

NOTE: Certificate or License holders actively involved in the supervision or review of compilations for third party reliance while employed by a firm may be exempted from peer review requirements if that registrant opts to individually earn four hours of CPE in the area of compilation only.

• Does the firm provide audits? Y/N – Does the firm perform audit engagements?

• Does the firm provide reviews? Y/N – Does the firm perform review engagements?

• Does the firm provide compilations? Y/N – Does the firm perform compilation engagements?

• Does the Firm Perform Engagements in Accordance With Government Auditing Standards? Y/N – Does the firm perform attest services in accordance with Government Auditing Standards (Yellow Book)?

• Has Your Firm Had a Peer Review? Y/N – Has your firm undergone peer review for the performance of attest services?

• If your firm has had a peer review, provide the year end date of the most recent peer review – Provide the year end date for the firm’s last peer review conducted for the performance of attestation services.
FIRM ONLINE RENEWAL INSTRUCTIONS

• If the Firm has not had a peer review, provide the engagement date of the first attest service performed? – If the firm has performed an attestation engagement and has not had a peer review, enter the date of the first attestation engagement performed.

• If the Firm performs attest services and has not undergone peer review, provide the date of Enrollment in a Board approved Sponsoring Organization peer review program? – If you have not had a peer review for the performance of attest services, enter your enrollment date in an OAB approved peer review program.

Services Provided

- Employment Services
  - Attest Services
  - Compilations
  - Advisory Services
  - Tax Return Preparation
  - Tax Planning Services
  - Investment Services
  - Financial Planning Services
  - Consulting Services
  - Management Advisory Services
  - Litigation Services
  - Bookkeeping Services

NOTE: You may find the definition for each of the services listed here by visiting the Rules/Law link on the Oklahoma Accountancy Board home page.

• Attest Services? Y/N
• Compilations? Y/N
• Advisory Services? Y/N
• Tax Return Preparation? Y/N
• Tax Planning Services? Y/N
• Investment Services? Y/N
• Financial Planning Services? Y/N
• Consulting Services? Y/N
• Management Advisory Services? Y/N
• Litigation Support Services? Y/N
• Bookkeeping Services? Y/N

UPDATED FEBRUARY 11, 2016
Attester Information

- Attester’s First Name – Enter the first name of the individual attesting to the accuracy of the information being submitted on this firm registration.
- Attester’s Middle Name – Enter the middle name of the individual attesting to the accuracy of the information being submitted on this firm registration.
- Attester’s Last Name – Enter the last name of the individual attesting to the accuracy of the information being submitted on this firm registration.

Once you have completed every section and have read and agreed to the attestation statement, click on Update.

NOTE: You have the option to upload attachments; ex. Ownership information, office locations serving Oklahoma clients, moral character supporting documents, peer review, etc.
PAYMENT PROCESS

At the License Detail screen, you can now click on make payment to proceed to checkout.

You will be redirected to the Add Payment screen where you have the option to Pay Now or Pay Later. Your answers to the firm registration questions have been saved and you may return at a later time to pay your registration fee if necessary. Although you may return and pay your registration fee at a later date, it will not be considered complete until the fee is paid.
Complete all of the applicable fields on the Payment Process screen.

### Transaction Summary

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK.gov Test Payment Process</td>
<td>$151.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$151.00</td>
</tr>
</tbody>
</table>

### Transaction Detail

<table>
<thead>
<tr>
<th>SKU</th>
<th>Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Firm Registration Fee</td>
<td>$50.00</td>
<td>1</td>
<td>$50.00</td>
</tr>
<tr>
<td></td>
<td>Firm Permit Fee</td>
<td>$100.00</td>
<td>1</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>Permit Fee</td>
<td>$1.00</td>
<td>1</td>
<td>$1.00</td>
</tr>
</tbody>
</table>

### Customer Billing Information

- **Customer Name**: 
- **Company Name**: 
- **Billing Address**: 
- **Billing Address 2**: 
- **Billing City**: 
- **State**: [Select State] 
- **ZIP/Postal Code**: 
- **Country**: [Select Country] United States 
- **Phone Number**: 
- **Fax Number**: 

### Credit Card Information

- **Credit Card Type**: [Select Card Type] 
- **Credit Card Number**: 
- **Expiration Date**
  - **Month**: 
  - **Year**: 
- **Name on Credit Card**: 

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Verify that all of the information is correct on the Payment Verification screen.

![Payment Verification](image)

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<td>Firm Permit Fee</td>
<td>$100.00</td>
<td>1</td>
<td>$100.00</td>
</tr>
<tr>
<td></td>
<td>Portal Fee</td>
<td>$1.00</td>
<td>1</td>
<td>$1.00</td>
</tr>
</tbody>
</table>

### Customer Billing Information

- **Customer Name:** John Doe
- **Company Name:** John Doe CPA, LLC
- **Billing Address:** 12345 OKC, OK
- **Billing Address 2:** 12345 OKC, Tulsa
- **Billing City:** Tulsa
- **State:** OK
- **ZIP/Postal Code:** 73122
- **Country:** US
- **Phone Number:** 405-522-2443
- **Fax Number:** 405-521-3118

### Payment Method

- **Credit Card Type:** VISA
- **Credit Card Number:** ****1111
- **Expiration Date:** 04/2015
- **Name on Credit Card:** John Doe

### Verification

Enter the characters from the image:

- Make Payment
- Cancel Payment
- Edit

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Click continue to go back to the My Services page.

**PRINT RECEIPT**

To print/view your receipt click on your firm number and you will be directed to the Details page.

*Receipt Information:* You will receive two email confirmations at the completion of the renewal process. The first of which will acknowledge the Oklahoma Accountancy Board has received payment of the firm registration and permit fees. You will receive a second email with the firm permit attached once the Oklahoma Accountancy Board approves the registration of the firm and the firm’s permit to practice public accounting in the state of Oklahoma.