

# 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 Tracker, 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 Tracker before beginning your Registration Renewal.**

## GETTING STARTED:


- Go to [www.ok.gov/oab](http://www.ok.gov/oab) and click on the **Online Services** link found on the center menu bar of the OAB homepage.



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

## Welcome to the Oklahoma Accountancy Board

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

 E-mail

 Password

**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 Doe Test	Legal First Name John	Legal Middle Name P
Phone Number (405) 522-3090	E-mail Address	Name on Certificate John P. Doe Test

### Registration / Licensure Information

Certificate/License No. 9999999	License Type Certified Public Accountant (CPA)	License Status Active
Registrant Since 01-May-2020	Effective Date 01-May-2020	Expiration Date 30-Apr-2021

☐ At the bottom of the Registrant Renewal screen, click **Continue and Review**.

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## Registrant 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 [okaceybd@oab.ok.gov](mailto:okaceybd@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	04/30/2021	

### Your application information is listed below

Application Type	License Type	Application Status	Submitted Date
Registrant Renewal	Certified Public Accountant (CPA)	New	

**Continue and Review**

## REGISTRATION RENEWAL:

### STEP 1 - APPLICATIONS INSTRUCTIONS

- The application for **Registration Renewal** contains 12 steps. After reading the Application Instructions, click **Save & Continue**.

**Registrant Renewal**

1 Application Instructions Step 1 of 12

**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.*

**Documents to be Submitted**

The following documents will be required to be uploaded to complete and submit in this application. You must upload a high quality image or PDF.

**Peer Review Enrollment Confirmation** - If you have enrolled in an OAB approved peer review program, you will need to upload proof in the Supporting Documents section of this application.

**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.

**Professional Ethics: The AICPA's Comprehensive Course** - You will be required to upload proof of completion for the Professional Ethics: The AICPA's Comprehensive Course and earned a score of at least 90%. *REQUIRED ONLY IF APPLYING FOR A LAPSED OR INITIAL PERMIT*

**Continuing Professional Education (CPE)** - You will be required to upload your certificates of completion for 40 hours of CPE. *REQUIRED ONLY IF APPLYING FOR A LAPSED OR INITIAL PERMIT*

**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.

### STEP 3 – 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 <b>Add New</b> to add a new record.						

< Previous Save & Continue >

## STEP 4 – OFFICE LOCATIONS

- This section is only for sole proprietors who are not incorporated.
- You do not need to add an office location if you only have the one listed in your employment section.

## STEP 5 – ACCOUNTING SERVICES

Check all services associated with accounting work performed last year whether for an employer, the public, or anyone other than yourself, or non-compensated services for immediate family members. Do not check if you performed the services(s) only on a volunteer bases OR as an attorney and did not sign any documents related to such service as a CPA or PA.

## STEP 6 - 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 tracker. Click **Save & Continue**.
  - **Please be advised, all registrants are required to enter CPE activities into the CPE Tracker, 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 Tracker BEFORE completing your Registration Renewal to avoid any delays.**

## Registrant Renewal

6 CPE Reporting Information

Step 6 of 12

**Note:** If you checked yes to any question in the Account Services page, you are not eligible for an exemption unless you changed to a related status in the previous year or unless you were initially certified in the previous year and are not applying for an initial permit.

Please select one of the options below \*

- I have completed continuing professional education (CPE) credits for the previous year.
- I did not complete the continuing professional education (CPE) credits for the previous year.
- I was initially certified this year and I do not have a CPE requirement for the previous year.
- 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.

Select...

**Important:** If you wish to apply for CPE Exemption for the year, please visit the [CPE Status Change & Exemption Request](#) page at the left navigation menu.

< Previous

Save & Continue >

## STEP 7 – PEER REVIEW INFORMATION

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

## STEP 8 – PERMIT TO PRACTICE PUBLIC ACCOUNTING

- Select Yes if you are applying for or renewing a permit to practice. Click **Save & Continue**.

## Registrant Renewal

8 Permit to Practice Public Accounting

Step 8 of 12

I am filing this renewal in conjunction with an application for a permit to practice \*

Yes

Please select one \*

I am applying to renew a permit currently in effect

**Note:** This choice may only be selected if you will be applying for permit renewal on or before the last day of your birth month.

Indicate appropriate compliance period \*

All CPE credits were earned in the previous calendar year

< Previous

Save & Continue >

## STEP 9 - UPLOAD SUPPORTING DOCUMENTS:

- Provide all of 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**.

## Registrant Renewal

9 Supporting Documents

Step 9 of 12

**Note:** Please provide all the necessary supporting documents.

### CPE Certificates for Permit to Practice Public Accounting

Please upload your certificates of completion or attendance required for the Permit to Practice Public Accounting (40 Hours)

Upload File

### Peer Review Enrollment Confirmation

Please upload your enrollment confirmation in an OAB approved peer review program

Upload File

### Peer Review Reports

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

Upload File

### Professional Ethics: The AICPA's Comprehensive Course

Please upload your certificates of completion and/or the electronic page from the AICPA showing your score

Upload Files

< Previous

Save & Continue >

## STEP 10 – DECLARATIONS

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

## STEP 11 – ATTESTATION

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

## STEP 12 - 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
<b>Total</b>	<b>\$50.00</b>

### Method of Payment

Please select method of payment.

Method of Payment \*

Credit Card

Select...

Check

Credit Card

Money Order

\$50.00

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.

< 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 63<sup>rd</sup> St., Ste. 210  
Oklahoma City, OK 73116

## CONFIRMATION:

- When you have completed all of 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 [okaceybd@oab.ok.gov](mailto:okaceybd@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](#)

**Dashboard**

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**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"/>

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**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"/>