

# QUALIFICATION APPLICATION INSTRUCTIONS



## 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 **Applicant 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:

- Applicants will need to activate their account by clicking on the [Apply now](#) link.



### Application Portal

New User? [Apply now](#)



- Enter your E-mail and re-enter it to confirm it. Click **Submit**. An activation link will be sent to your E-mail.



### Send My Activation Link Via E-mail

Please enter your confidential e-mail address that you use to receive your activation link.

This e-mail account must not be shared and must be used only by you.



- Once you receive your temporary password, enter your **email address and the temporary password**, and click **Sign In**.



### Application Portal

New User? [Apply now](#)



- You will then be prompted to set up Two-Stage Authentication Security Questions for your account. Click **Done** to continue.



### Two-Stage Authentication: Security Questions

To help protect the privacy of your account, please select three questions below and provide their corresponding answers.

Security Question 1 \*

Answer \*

Security Question 2 \*

Answer \*

Security Question 3 \*

Answer \*



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- You will also be prompted to reset your Password from the temporary password that was emailed to you. Enter your new password and then re-enter it to confirm it. Click **Save** to continue.



### Password Reset

To help protect the privacy of your account, please provide a new password and confirm it below. Your new password must be at least 8 characters, contain a minimum of one upper case letter, one lower case letter, one number and one special character. Your new password must not contain commonly used words like 'password'.

Password Strength: Weak

New Password \*

Confirm Password \*



## ONLINE APPLICATION:

- Once logged in, to begin a new application click on **Start New Application**.

### Online Applications

- Welcome
- Invoices & Receipts
- Account Settings

### Welcome

Thank you for your interest in applying with the Oklahoma Accountancy Board. Please follow the step-by-step instructions to complete your application. You will be able to save your progress and return to it later.

For assistance, please contact us at (405) 521-8636 or email [okaccybd@oab.ok.gov](mailto:okaccybd@oab.ok.gov).



- Select the type of application you are applying for –
  - Certified Public Accountant (CPA) or Public Accountant (PA) OR
  - Firm

Online Applications

Welcome  
Invoices & Receipts  
Account Settings

- 1 Application Type
- 2 Application Instructions
- 3 Personal Information
- 4 Attestation
- 5 Payment
- 6 Submitted

**Application Type**

**Note:** Please select the type of application you are applying for.

**Warning:** Once an application type has been made, changing to another application type will result in previous information being reset.

Applying For: \*



- Choose Certified Public Accountant (CPA) or Public Accountant (PA) from the drop down menu.

Online Applications

Welcome  
Invoices & Receipts  
Account Settings

- 1 Application Type
- 2 Application Instructions

**Application Type**

**Note:** Please select the type of application you are applying for.

**Warning:** Once an application type has been made, changing to another application type will result in previous information being reset.

Applying For: \*

- A list of available applications will generate. Choose the **Qualification Application for Eligibility**. Click **Select this Application** to continue.

- 2 Application Instructions
- 3 Personal Information
- 4 Attestation
- 5 Payment
- 6 Submitted

**Qualification Application for Eligibility**  
Apply for Eligibility to sit for the CPA examination. Please read instructions carefully.  
**Select this Application >**

**Transfer of Credit Application for Eligibility**  
Apply to transfer Exam credits from another jurisdiction. Please read instructions carefully.  
**Select this Application >**

**Criminal History Eligibility Review**  
Request to consider eligibility due to criminal history.  
**Select this Application >**

**Reciprocal Application**  
Pursuant to Section 10:15-21-1(b) of the Oklahoma Administrative Code: "The application for a reciprocal certificate or license shall be filed within one hundred twenty (120) days of employment with a public accounting firm located in this state or engaging in the practice of public accounting in Oklahoma."  
When reading the instructions and completing the forms included with the reciprocal application, please note that all references to the "Act" refer to the Oklahoma Accountancy Act and references to the "Code" refer to the Oklahoma Administrative Code.  
**Select this Application >**



The **Qualification Application for Eligibility** contains 12 steps.

- ✓ Application Type:  
Qualification Application for Eligibility
- 2 Application Type Details
- 3 Application Instructions
- 4 Personal Information
- 5 Citizenship and Residency
- 6 Educational Background
- 7 Employment Information
- 8 Supporting Documents
- 9 Declarations
- 10 Attestation
- 11 Payment
- 12 Submitted



**Please make sure that you read the application instructions closely before continuing.**

***The Qualification Application entails several documents that are required to be uploaded to be complete and submit the application.***

**These documents can be found in the links on the Application Instructions page.**

**Additionally, there are documents that will need to be sent to the OAB. Your application will not be considered complete until these documents are received.**

**Application Instructions**

**Important:** Please read the following application instructions closely.

Instructions for Qualification Application for Eligibility

**Eligibility to Apply.** All educational requirements to qualify must be met at the time the application is filed with the OAB. The OAB cannot waive any of the eligibility requirements. To review the education requirements, you may download [this document].

Please complete the application and submit all the necessary requirements. By the end of the application, you will be asked to pay the application fee in the amount of **\$90.00 (non-refundable)** which is based on the following:

**Qualification Fees.** A \$75 non-refundable application fee (Title 59, Section 15.8 A) is required with the qualification application.

**Criminal History Search.** The Oklahoma Accountancy Board will perform a criminal history background search through the Oklahoma State Bureau of Investigation for all qualification applicants. The applicant is responsible for the \$15 cost of the background check.

If you qualify, you will receive an email notification from the OAB and a Start Examination Application link will appear on your existing application in the Welcome page.

**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.

**Photograph** - You will be asked to upload a recent 2" x 2" photograph (passport style)

**Citizenship / Qualified Alien Status** - Citizenship is not required. However, state law mandates that the OAB establish that you are legally in the United States. If you are not, we will be unable to process your application. As such, you will be required to upload proof of your qualified alien status.

**Proof of Lawful Presence in the U.S.** - Applicants must submit proof of lawful presence in the United States (affidavit). You may download the affidavit form [here].

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

**Documents to be Sent**

Most of the following documents must come from a third party or original source. You will be required to provide these no later than seven days after submission of your application. The application will not be considered complete until these documents are received by the OAB. If we already have some of this documentation on file, our staff will update the application accordingly after our review.

**Official Transcript(s)** - Transcript(s) must bear the official signature of the registrar and, if applicable, seal of the college. Do not have the university or college send transcripts directly to the OAB office.

**Education Outside the United States** - If all or part of your education toward your eligibility was from a college outside the United States, it will be necessary to have your education evaluated by NASBA International Evaluation Services (NIES). NIES will charge you a fee for the evaluation, and it can take two to three months for some evaluations to be complete. Your application will be considered incomplete and cannot be processed if the evaluation is not included.

**eScrips** - Must be sent directly from the University to the Examination Coordinator at the OAB office in order to be official.

< Previous Save & Continue >

Click **Save & Continue.**

## ONLINE APPLICATION:

- You can edit employment information by clicking the **Edit** button.
- You can add new employment information by clicking **+Add New**.

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

**Employment Information**

Please fill in your employment history.

Employer Name	City	Role	Accounting Related	Start Date	End Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	N/A	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

## SUPPORTING DOCUMENTS:

- Provide all of the necessary supporting documents by uploading the files. Click Upload File to select the document. When finished, click **Save & Continue**.

**Online Applications**

Welcome  
Invoices & Receipts  
Account Settings

Application Type: Qualification Application for Eligibility  
Application Type Details  
Application Instructions  
Personal Information  
Citizenship and Residency  
Educational Background  
Employment Information  
8 Supporting Documents  
9 Declarations

**Supporting Documents**

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

**Photograph**  
Please upload a recent 2" x 2" passport photograph \*

**Lawful Presence in the US**  
Please upload your proof of lawful presence in the United States (affidavit) \*

## PAYMENT:

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

### Fee Breakdown

Invoice Item	Amount
Qualification Application Fee	\$75.00
Criminal History Search	\$15.00
<b>Total</b>	<b>\$90.00</b>

### Method of Payment

Please select method of payment.

Method of Payment \*

**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 pay

Amount Due: \$90.00

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.

- Supporting Documents
- Declarations
- Attestation
- 11 Payment**
- 12 Submitted

### 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. Your fees will be processed securely online.

Amount Due: \$90.00

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 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

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## CONFIRMATION:

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



 Logout

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### Online Applications

Welcome

Invoices & Receipts

Account Settings

#### Submitted

Thank you for completing your application. The OAB will only start processing your application once all the requirements have been met. If you have questions about your application, you may call us at 405-521-2397 or email us at [okaccybd@oab.ok.gov](mailto:okaccybd@oab.ok.gov).

To view the status of your application, please refer to the [Welcome](#) section.

To view your payments, please refer to the [Invoices & Receipts](#) section.