

**Welcome** to the new ISBA Online Services system

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Steps for using the new online system:

<https://isba.idaho.gov/ISBAServices/UniversalPages/LoginPage.aspx>

ISBA Online Services (Login Page) ( IP: 10.70.7.71)

Email:  ?

Password:  ?

Login

Need to Reset Your Password? [Reset Your Password now](#)

v1.0.0 **Linked Production**



To log into the system you will need:

- 1) The email address on file with the Board office and,
- 2) Your PIN/Password



## OPTIONS:

- Summary of your Idaho License
- Address Changes
- Change License Status
- Report CPE
- Renew License
- Upload Documents

Open year round: License Summary, Address Changes, Report CPE, and Change License Status

Open as required: Renew License and Upload Documents

To select an option, first click in the box to the left of your name. Then choose a button at the bottom of the screen.

**\*\* Action Satisfactorily Completed \*\***

	Name ↓	Number ↓	Issued ↓	Expires ↓	Status ↓
<input type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]	6/30/2021	Active

1 - To VIEW information about a license click the blue highlighted license number (XX-####) for that line.  
2 - If you manage multiple licenses click the check mark on the left to highlight that line for an easier reference  
3 - To select one of the provided services for a license, click the checkbox next to it and select the appropriate action from below.

[Renew License](#) [Pay Fines](#) [Report CPE](#) [Upload Document](#) [Address Changes](#) [Exit](#)  
[Change Status](#)

# License Summary Screen

To access this information click on your license number on the first screen.

Board Actions: if there was any formal action taken against your license it will be listed under the Board Action section. Along with an accessible copy of a stipulation/consent or final order document.

IDAHO Official Government Website

Main PortalContact UsA A



Public Record Information - Online Services

[Close this License/Registration.](#)

License Status:

Business Phone:

Board:

Idaho Board of Accountancy

License Type:

Certified Public Accountant

License Number:

Date of Issue:

Expiration Date:

6/30/2021

History

Year	Status	Begin	End
2020	Active	7/1/2020	6/30/2021
2019	Active	7/1/2019	6/30/2020
2018	Active	7/1/2018	6/30/2019

Board Actions - No Board Actions

## Address Change Screen

Make sure to click 'Save Changes' before you click the 'Close' button.

Please check the address information below. If one or both of the addresses have changed, you may enter the correct information.  
When finished with changes, click the [Save Changes](#) button to submit ALL changes.  
Click the [Close](#) button to exit this form

Name: [REDACTED]	Number: [REDACTED]
Type: Certified Public Accountant	
Expires: 6/30/2021	
Issue Date: [REDACTED]	
* (This is your MAILING address)	
Mailing Line 1: [REDACTED]	Alternate Line 1: [REDACTED]
Line 2: [REDACTED]	Line 2: [REDACTED]
Country: USA - USA	Country: USA - USA
Zip: 83714 2375	Zip: 83714 2375
City/State: Boise ID	City/State: Boise ID
In Care Of: [REDACTED]	
Work Phone: [REDACTED]	eMail: [REDACTED]
Ext: [REDACTED]	Alternate Email: [REDACTED]
Home Phone: [REDACTED]	
Cell Phone: [REDACTED]	Fax: [REDACTED]
<a href="#">More Licenses</a>	<a href="#">Save Changes</a> <a href="#">Close</a>



## Change Status Screen

As stated on the screen, your current license status is effective through June 30<sup>th</sup>.

This is a request for status change for the upcoming licensing cycle.

Click 'Confirm Change' prior to 'Close/Cancel' button.

License No

License Name

Issued / Expires / Status

6/30/2021

Active

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### License Status Change Request

Your current license status is effective through June 30th. This is a request for status change for the upcoming licensing cycle, depending on the status change request you may need to pay the annual fee during the upcoming license renewal cycle.

**Inactive** annual fee: \$100.00 may not practice public accounting, no CPE requirement. Must use "CPA-Inactive" or "LPA-Inactive". Do not publicly display wall certificate. May provide volunteer services for which the licensee receives no direct or indirect compensation. Refer to IDAPA Rule 402.02.

**Retired** annual fee: \$100.00 reached 55 years of age or is disabled, may not practice public accounting, no CPE requirement. Must use "CPA-Retired" or "LPA-Retired". Do not publicly display wall certificate. May provide volunteer services for which the licensee receives no direct or indirect compensation. Refer to IDAPA Rule 402.02.

**Lapsed** no annual fee, no CPE requirement and may not practice public accounting or use title CPA or LPA. Do not publicly display wall certificate.

By clicking the 'Confirm' button I certify to the truth and accuracy of all statements, answers and representations in this report.

Requested License Status

Inactive

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Confirm Change

Close/Cancel

# Report CPE Screen

On this page you will find the amount of CPE you reported last year and what your requirement is for the current reporting year.

**For each course you completed, record the information as displayed on your certificate of completion. See next screen for more details.**

When you have entered the individual course information, click on the 'Add CPE Course' button. This will add the course to our system and display at the bottom of the page under 'Courses Completed January 1<sup>st</sup>/December 31<sup>st</sup>'

If you need to change any information you will need to click in the box next to the course, then click delete. You will then need to reenter all the information for the course.

Once you have entered all your courses click the 'Submit CPE' button. The system will confirm that you want to submit your CPE. When you click Yes, the system will automatically create a summary report for you to print or save for your records.

License No	<input type="text"/>		
License Name	<input type="text"/>		
Issued / Expires / Status	<input type="text"/>	6/30/2021	Active
	<b>CPE Hours</b>	<b>Ethics Hours</b>	<b>CPE Status</b>
Credited for Previous Year	50.00	3.00	Complete
Required for Current Year	30.00	1.00	Required

## Report a CPE Course (2020)

Attended / Completed	<input type="text"/>
Delivery Method	Blended
Title of Program	<input type="text"/>
Sponsor	<input type="text"/>
CPE Hours	0
Ethics Hours	0

Add CPE Course

### Instructions:

To add a completed course into your CPE record enter all data for completed CPE course, click the "Add CPE Course" button. The form will refresh, and your data will be saved into the system.

The form below displays the existing CPE Courses you have reported to the Board. If any edits or corrections need to be made to a course check the delete box to the right of the course then Click the "Delete CPE Course" button. The form will refresh and you will need to re-enter the course data.

Please close this form when done entering completed CPE courses. Your entries will be automatically saved into uour CPE record.

Click the 'Submit' button when you have recorded all the courses you completed for the reporting year.

## Courses Completed January 1st / December 31st(Mark to Delete)

Attended/ Completed	Delivery Method	Title of Program	Sponsor	CPE Hours	Ethics Hours	Total Hours	Delete
** No Records Found **							

Delete Courses

Submit CPE



Close/Cancel



# CPE Course Information Details

Record the information listed on your certificate.

## Report a CPE Course (2020)

Attended / Completed	<input type="text"/>	
Delivery Method	Blended 	
Title of Program	<input type="text"/>	
Sponsor	<input type="text"/>	
CPE Hours	<input type="text" value="0"/>	
Ethics Hours	<input type="text" value="0"/>	
<input type="button" value="Add CPE Course"/>		

- **Attended/Completed:** if date range use the last date attended/completed
- **Delivery Method:** click on the down arrow for a list of delivery methods
  - See the next slide for description
- **Title of Program:** this can be abbreviated
- **Sponsor:** i.e. Idaho Society or ISCPA
- **CPE Hours:** amount listed on certificate - non ethics hours
- **Ethics Hours:** ethics hours

As soon as you click 'Add CPE Course' it is added to the bottom of the page and into your internal CPE record.



Delivery Method

Blended



The system auto populates with the first alphabetical listed delivery method.

You will need to click on the down arrow in the right side of the box to select the delivery method that is recorded on your certificate of completion.

Blended

College/University

Group - Internet

Group - Live

Instructor

Nano

Published Material

Self Study

Unassigned

- **Blended** learning program. An educational program incorporating multiple learning formats.
- **College or University courses** – Credit and noncredit courses, university or college credit and noncredit courses that meet 2016 NASBA Statement of Standards.
- **Group Internet or Group Live** program. Any group live or group Internet based programs.
- **Instructor and discussion leaders** of learning activities may receive CPE credit for their preparation, review, and presentation time to the extent the activities maintain or improve their professional competence and meet the requirements of these Standards.
- **Nano** learning program. A tutorial program designed to permit a participant to learn a given subject in a 10-minute time frame.
- **Published Materials** – The board may approve credit for the writing of published articles, books, or CPE programs to include credit for research and writing time. The article, book, or CPE program must be formally reviewed by an independent party. All supporting documentation must be submitted into the Board office with the CPE report for review.
- **Self study** program. An educational program completed individually without the assistance or interaction of a real-time instructor.
- **Unassigned** – this field should only be used after speaking with the Board office.

## Exiting – Correcting - Submitting

Courses Completed January 1st / December 31st(Mark to Delete)

Attended/ Completed	Delivery Method	Title of Program	Sponsor	CPE Hours	Ethics Hours	Total Hours	Delete
11/27/2020	Group - Internet	2020 Tax Update	ISCPA	6.00	0.00	6.00	<input type="checkbox"/>
11/27/2020	Self Study	Ethics for Idaho	ISCPA	0.00	2.00	2.00	<input type="checkbox"/>
Totals ==>				6.00	2.00	8.00	

Delete Courses

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Submit CPE Close/Cancel

### Review course details

If you need to correct any detail you will need to delete the entire course information and re-enter.

### Correcting course details

click in the box to the far right of the course you need to correct, then click on the 'Delete Courses' button.

### Exiting the system

If you want to leave the system click on the 'Close/Cancel' button

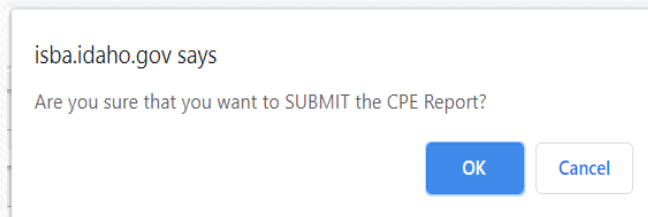
### Submitting CPE

When you have recorded all the courses you completed in the reporting year click on the 'Submit CPE' button. \*see next screen for more details.



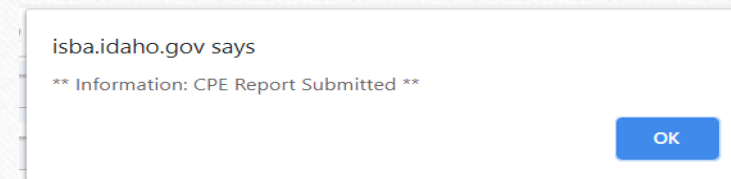
- ✓ Confirm
- ✓ Print
- ✓ Ok
- ✓ Exit (Close/Cancel)

**CONFIRM:** When you click the submit CPE button a small box, shown below, will pop up at the top of the screen, click OK or cancel.



If you click the OK button two things will happen:

- 1) new box stating that your CPE Report was Submitted, and
- 2) a pdf summary of your submitted CPE report will automatically be created. Remember to **PRINT** or save a copy of this report for five (5) years as per Idaho Accountancy Rules.



**EXIT:** click on the 'Close/Cancel button and you will be taken to the main menu screen.



At the top of the page you will see this message:

**\*\* Information: CPE Report Submitted \*\***

# Upload Document Screen

- Currently this page is only available for CPE audit or extensions.
- Only one (1) PDF, JPG, or PNG formatted document can be attached.
- The system auto generated the reference and document number.
- Begin your short title using the CPE year.
- Click the 'Attach Document' button. You will receive a message that your document has been received.
- Then 'Close' button to exit the screen.
- The Board office will reach out to you if there are any issues.
- Once the audit or extension is complete you will reach written notification.

Reference NumberLICISBACP3950

Licensee Name

Document ReferenceCES531596

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## Upload Documents

Examples of Documents (upload documents in PDF, JPG or PNG format)

- CPE Certificates

To begin:

Click the Browse button, locate a Document, then click the Open button.

Choose FileNo file chosen

Enter a short description of this document

Attach Document

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## Review Required Documents

Documents that you previously submitted are listed below.

- To remove an entry, mark the Delete box for that line, then click Delete Document

Document	Date Created	Delete
** No Records Found **		

Delete Documents

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Close