

# Idaho State Board of Accountancy

## Online Bulk License Renewal Instruction Manual

The Idaho State Board of Accountancy enables CPAs, LPAs and Practice Privilege holders to easily process license renewals online and conveniently pay fees with a credit/debit card (VISA, MasterCard, Discover). This manual features step-by-step instructions for bulk renewal activities. ***Screen images, text, and fees shown in this manual may differ slightly in actual application.***

### **Remember**

The Idaho State Board of Accountancy license renewal deadline is **July 1**.

### **Online Bulk Renewal Benefits**

Only one payment needed • Faster license processing • Secure, encrypted connection • Calculates fees automatically • Guaranteed complete and accurate • Provides printable receipt • Allows you to update contact information.

### **Need Assistance?**

For questions about this service, call Access Idaho at 208-332-0102 (toll free: 1-877-443-3468). For license questions and information, please call the Idaho State Board of Accountancy office at 208-334-2490.

*Important: This application may not work correctly in the MSN browser. It is recommended that you use another browser, such as Internet Explorer, Netscape, or Firefox. Please make sure your browser is enabled to accept cookies. Access Idaho (the State's official web administrator) processes credit/debit card payments on behalf of ISBA.*

# Table of Contents

Step 1: Log-in to ISBA's Licensing Services.....	3
Step 2: Select Applicable Roster Button.....	4
Step 3: Build and/or Edit Your Licensee Roster .....	5
Step 4: Select Licensees to Renew.....	7
Step 5: Confirm Your Renewal Order.....	8
Step 6: Enter Billing Address Info .....	8
Step 7: Enter Credit/Debit Card Information .....	9
Step 8: Print and/or Save Receipt.....	9
Public Accounting Firms Only: Editing Firm Contact Info.....	10

## Step 1: Log-in to ISBA's Licensing Services

To ensure security, you will need an Access Idaho username and password to renew licenses in bulk online with the Idaho State Board of Accountancy.

ISBA's licensing services web address: [www.isba.idaho.gov](http://www.isba.idaho.gov)



IDAHO  
Board of Accountancy

*Your licensees must answer the litigation questions before you can pay for their renewal online.*

### Bulk Renewal - Login

1. Accountants complete individual renewal up to the point of payment
2. Build or import a roster of accountants - all renewals do not need to be complete to build your roster
3. Pay for your accountants' renewals

### Registered Users

*Passwords expire every 6 months.*

Username:  [Forgot username?](#)  
Password:  [Forgot password?](#)  
\* Username and password are case sensitive.

If you are unable to access this application with your current username and password, please contact [Access Idaho](#).

### New Users

To use this service you will need a username and password supplied by Access Idaho.

[Create A New User Account](#)

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Fax: (208) 334-2615 · Email: [isba@isba.idaho.gov](mailto:isba@isba.idaho.gov)

*Select this link to set up your username and password. After creating a user account, an initial password will be sent immediately to the email address you provide.*

**Note:** The first time you log into this page with your initial password, you will be prompted to change your password to one of your choosing. Passwords are case-sensitive, must be at least 5 characters long, and can contain numbers, letters, and/or symbols. For security purposes, do not allow your web browser (Internet Explorer, Netscape, Firefox, etc.) to remember your login information.

## Step 2: Select Applicable Roster Button



### Bulk Renewals

*For public accounting firms*

I am a representative of a public accounting firm subject to Peer Review.

Firm Number  [ [Forgot Your Firm Number?](#) ]

*For all other companies & organizations*

I am a representative of a firm not subject to Peer Review or an entity in industry, government, or acadamia.

[ [Manage User Account](#) ] [ [Logout](#) ]

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 Fax: (208) 334-2615 · Email: [isba@isba.idaho.gov](mailto:isba@isba.idaho.gov)

Public accounting firms can view their roster immediately and have the option to edit firm contact information (see page 10 for editing).



*See Step 3 for adding/deleting licensees.*

### Bulk Renewals

Holly Suit  
 ERNST & YOUNG LLP - FR-0416  
 Active, Expires 09/30/2006

### Contact Information

Please notify the Board within 30 days of any change of address.

Address ERNST & YOUNG LLP  
 999 EASY ST STE 9900  
 BOISE, ID 97222  
 C/O: DANIEL BOONE

Phone (206) 621-1800

Fax (206) 654-7799

Email [bill@accessidaho.org](mailto:bill@accessidaho.org)

*Public Accounting Firms: See page 10 about how to edit your firm's contact information.*

[ [Edit Contact Information](#) ]

### Renew Your Accountants

Num	Name	Status
CP-0014	MUNRO, JAMES	Lapsed
CP-0488	HENRY, LOUIS E	Waiting on Accountant
CP-0701	ALLEN, SHARON LEE	Waiting on Accountant
CP-0996	BIRD, LARRY RICHARD	Waiting on Accountant
CP-1039	NELSON, GREGORY ALLEN	Waiting on Accountant
CP-1102	FISHER, DOUGLAS V	Renewed [ <a href="#">Receipt</a> ]
CP-1400	CZARNIECKI, WALTER JOHN	Renewed [ <a href="#">Receipt</a> ]
<input type="checkbox"/> CP-1437	FLYNN, SHAUN TIMOTHY	Ready for Payment (Active)
CP-1638	WILLIAMS, MARLENE SHARPE	Waiting on Accountant

[ [Printable Roster](#) ] 44 Entries

[ [Check All Renewable](#) ]

"Waiting for Accountant" indicates licensee must complete their [individual renewal](#)

[ [Manage User Account](#) ] [ [Logout](#) ]

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## Step 3: Build and/or Editing Your Licensee Roster

### Option 1. Search and add by file (license) number.



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Board of Accountancy

Enter license number(s) here.

**Add or Delete Accountants from Roster**  
[ < Renew from Roster ]

**Search by File Number**  
Add multiples with commas, ie: CP-4927, CP-4498, PA-0092

**Search by Name**

**Results**  
No results  
0 Results

**Your Accountants**

Num	Name	[ Delete ]
CP-0014	MUNRO, JAMES	[ Delete ]
CP-1039	NELSON, GREGORY ALLEN	[ Delete ]
CP-1102	FISHER, DOUGLAS V	[ Delete ]
CP-1400	CZARNIECKI, WALTER JOHN	[ Delete ]
CP-1437	FLYNN, SHAUN TIMOTHY	[ Delete ]
CP-1638	WILLIAMS, MARLENE SHARPE	[ Delete ]
CP-1981	DAY, TERRY DOUGLAS	[ Delete ]
CP-2168	SMITH, TIM GRAY	[ Delete ]

*This area will be blank when companies/entities not subject to peer review log in for the first time.*

Roster Complete - Continue with Renewal

[ Manage User Account ] [ Logout ]

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### Select desired licensee(s).



IDAHO  
Board of Accountancy

Adds name to roster (see next screen).

**Add or Delete Accountants from Roster**  
[ < Renew from Roster ]

**Search by File Number**  
Add multiples with commas, ie: CP-4927, CP-4498, PA-0092

**Search by Name**

**Results**  
CP-4384 FITZGERALD, KRISTINA MARIE  
1 Results

**Your Accountants**

Num	Name	[ Delete ]
CP-0014	MUNRO, JAMES	[ Delete ]
CP-1039	NELSON, GREGORY ALLEN	[ Delete ]
CP-1102	FISHER, DOUGLAS V	[ Delete ]
CP-1400	CZARNIECKI, WALTER JOHN	[ Delete ]
CP-1437	FLYNN, SHAUN TIMOTHY	[ Delete ]
CP-1638	WILLIAMS, MARLENE SHARPE	[ Delete ]
CP-1981	DAY, TERRY DOUGLAS	[ Delete ]
CP-2168	SMITH, TIM GRAY	[ Delete ]

*Search results display here.*

Roster Complete - Continue with Renewal

[ Manage User Account ] [ Logout ]

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## Confirm addition.



# IDAHO

Board of Accountancy

### Add or Delete Accountants from Roster

[\[ < Renew from Roster \]](#)

#### Search by File Number

Add multiples with commas, ie: CP-4927, CP-4498, PA-0092

#### Search by Name

**Results**

[Num](#) [Name](#)

No results

0 Results

**NOTE:** This does not update or replace your annual Firm Registration with the Idaho State Board of Accountancy. It is strictly for license renewal.

#### Your Accountants

Num	Name	
CP-0014	MUNRO, JAMES	<a href="#">[ Delete ]</a>
CP-1039	NELSON, GREGORY ALLEN	<a href="#">[ Delete ]</a>
CP-1102	FISHER, DOUGLAS V	<a href="#">[ Delete ]</a>
CP-1400	CZARNIECKI, WALTER JOHN	<a href="#">[ Delete ]</a>
CP-1437	FLYNN, SHAUN TIMOTHY	<a href="#">[ Delete ]</a>
CP-1638	WILLIAMS, MARLENE SHARPE	<a href="#">[ Delete ]</a>
CP-1981	DAY, TERRY DOUGLAS	<a href="#">[ Delete ]</a>
CP-2168	SMITH, TIM GRAY	<a href="#">[ Delete ]</a>
CP-4384	FITZGERALD, KRISTINA MARIE	<a href="#">[ Delete ]</a>

9 Entries

*Added name*

Roster Complete - Continue with Renewal

[\[ Manage User Account \]](#) [\[ Logout \]](#)

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## Option 2. Search and add by name



# IDAHO

Board of Accountancy

*Enter licensee's first and/or last name here.*

### Add or Delete Accountants from Roster

[\[ < Renew from Roster \]](#)

#### Search by File Number

Add multiples with commas, ie: CP-4927, CP-4498, PA-0092

#### Search by Name

**Results**

[Num](#) [Name](#)

No results

0 Results

**NOTE:** This does not update or replace your annual Firm Registration with the Idaho State Board of Accountancy. It is strictly for license renewal.

#### Your Accountants

Num	Name	
CP-0014	MUNRO, JAMES	<a href="#">[ Delete ]</a>
CP-1039	NELSON, GREGORY ALLEN	<a href="#">[ Delete ]</a>
CP-1102	FISHER, DOUGLAS V	<a href="#">[ Delete ]</a>
CP-1400	CZARNIECKI, WALTER JOHN	<a href="#">[ Delete ]</a>
CP-1437	FLYNN, SHAUN TIMOTHY	<a href="#">[ Delete ]</a>
CP-1638	WILLIAMS, MARLENE SHARPE	<a href="#">[ Delete ]</a>
CP-1981	DAY, TERRY DOUGLAS	<a href="#">[ Delete ]</a>
CP-2168	SMITH, TIM GRAY	<a href="#">[ Delete ]</a>
CP-4384	FITZGERALD, KRISTINA MARIE	<a href="#">[ Delete ]</a>

9 Entries

Roster Complete - Continue with Renewal

[\[ Manage User Account \]](#) [\[ Logout \]](#)

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Select desired licensee(s).

The small triangle in a column header indicates how the list is sorted (by number in this example). Click on the "Name" header to sort by name.



**Add or Delete Accountants from Roster**  
[\[ < Renew from Roster \]](#)

**Search by File Number**  
 Add multiples with commas, ie: CP-4927, CP-4498, PA-0092

**Search by Name**

**Results**

Num ▲	Name
CP-0052	GIBBON, JAMES E
CP-0085	BUTLER, JAMES F
CP-0088	WALSTON, JAMES RUSSEL
CP-0092	GIESE, JAMES W
CP-0103	HEFLEY, JAMES W
CP-0126	EXETER, JAMES LEROY
CP-0147	HILL, EDGER JAMES

178 Results

**Your Accountants**

Num ▲	Name	[ Delete ]
CP-0014	MUNRO, JAMES	[ Delete ]
CP-1039	NELSON, GREGORY ALLEN	[ Delete ]
CP-1102	FISHER, DOUGLAS V	[ Delete ]
CP-1400	CZARNIECKI, WALTER JOHN	[ Delete ]
CP-1437	FLYNN, SHAUN TIMOTHY	[ Delete ]
CP-1638	WILLIAMS, MARLENE SHARPE	[ Delete ]
CP-1981	DAY, TERRY DOUGLAS	[ Delete ]
CP-2168	SMITH, TIM GRAY	[ Delete ]
CP-4384	FITZGERALD, KRISTINA MARIE	[ Delete ]

9 Entries

Roster Complete - Continue with Renewal

[\[ Manage User Account \]](#) [\[ Logout \]](#)

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### Step 4: Select licensees to renew



**Bulk Renewals**  
**Renew Your Accountants**

Add or Delete Accountants from Roster

Num ▲	Name	Status
CP-0014	MUNRO, JAMES	Lapsed
CP-1039	NELSON, GREGORY ALLEN	Waiting on Accountant
<input checked="" type="checkbox"/>	CP-1102 FISHER, DOUGLAS V	Ready for Payment (Active)
<input checked="" type="checkbox"/>	CP-1400 CZARNIECKI, WALTER JOHN	Renewed <a href="#">[ Receipt ]</a>
<input type="checkbox"/>	CP-1437 FLYNN, SHAUN TIMOTHY	Ready for Payment (Active)
<input type="checkbox"/>	CP-1638 WILLIAMS, MARLENE SHARPE	Waiting on Accountant
<input type="checkbox"/>	CP-1981 DAY, TERRY DOUGLAS	Waiting on Accountant
<input type="checkbox"/>	CP-2168 SMITH, TIM GRAY	Ready for Payment (Active)
<input type="checkbox"/>	CP-4384 FITZGERALD, KRISTINA MARIE	Waiting on Accountant

9 Entries

[\[ Printable Roster \]](#)  
[\[ Check All Renewable \]](#)

\*Waiting for Accountant\* indicates licensee must complete their individual renewal

[\[ Manage User Account \]](#) [\[ Logout \]](#)

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Check boxes appear next to licensees ready for online renewal. Click boxes to renew certain licensees. Or select the "Check All Renewable" link.

Click to sort by status.

Click to display and/or print receipt.

Licensees who have not answered litigation questions online

## Step 5: Confirm Your Renewal Order



IDAHO  
*Board of Accountancy*

All licensees selected for renewal will be listed here.

### Review Your Order

You will be charged the following fees for the renewals you've selected:

Renewal Fee for CP-1102 \$120.00

Total \$120.00

If everything looks correct, click 'Continue' to begin the payment process.

< Back Continue >

[\[ Manage User Account \]](#) [\[ Logout \]](#)

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## Step 6: Enter Billing Address Info



IDAHO  
*Board of Accountancy*

Welcome to Access Idaho's instant payment gateway. You've been sent here to pay for the following:

Bulk renewal by Holly Suit

Service: Bulk Renewals

Description	Cost	Qty	Total
Renewal Fee for CP-2168	\$120.00	1	\$120.00
Renewal Fee for CP-1102	\$120.00	1	\$120.00
<b>Total:</b>			<b>\$240.00</b>

### Instant Payment Customers

Please fill out the following information, and select your desired method of payment. Fields marked with an asterisk (\*) are required; your telephone number and e-mail address will be used only for the purpose of contacting you in the event of billing difficulties and/or e-mailing you a copy of your receipt. Billing contact information is strictly confidential and will not be used for marketing purposes. For more information, please read [Access Idaho's privacy policy](#).

\* Name:

\* Billing Address:

\* City:

\* State/Province:

Country:

\* Postal/Zip Code:

Telephone Number:   
(Optional: For billing questions)

E-mail Address:   
(Optional: For billing questions and e-mail receipt)

\* Payment Method:

Billing problems? Contact [Access Idaho](#) (208) 332-0102, 1 (877) 4ID-EGOV.

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Fax: (208) 334-2615 · Email: [isba@isba.idaho.gov](mailto:isba@isba.idaho.gov)

## Step 7: Enter Credit/Debit Card Information



### Billing Information

Please verify that the following information is correct. The address shown should be the billing address of the credit card you intend to use.

Bulk renewal by Holly Suit

Service: Bulk Renewals

Description	Cost	Qty	Total
Renewal Fee for CP-2168	\$120.00	1	\$120.00
Renewal Fee for CP-1102	\$120.00	1	\$120.00
<b>Total:</b>			<b>\$240.00</b>

Name: First Last

Address: Address 1

Boise, ID US 83702

Telephone Number: 555-555-5555

E-mail Address: holly@accessidaho.org

[ <<< Back to payment information page 1 ]

### Credit Card Information

Please provide your credit card information below:

Card Number: 5555555555555555

Card Type: Visa

Expiration Date: 03 / 07

Next >>>

Billing problems? Contact [Access Idaho](#) (208) 332-0102, 1 (877) 4ID-EGOV.

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Fax: (208) 334-2615 · Email: [isba@isba.idaho.gov](mailto:isba@isba.idaho.gov)

## Step 8: Print and/or Save Receipt

*(The application automatically emails a receipt to you as well.)*



*Please note.*

Thank you for your business.

Your statement will indicate that Access Idaho has charged you for the following transaction. Your requests have been sent to the Idaho State Board of Accountancy for processing.

Please save or [print](#) this page for future reference -- It is your receipt for these charges.

Transaction ID	4226
Date Created	Thu 06/01/2006 02:04:07 PM MDT
Description	Bulk renewal by Holly Suit
Renewal Fee for CP-2168	\$120.00
Renewal Fee for CP-1102	\$120.00
<b>Total</b>	<b>\$240.00</b>

Providing there are no issues with the renewals, the accountants you have renewed should receive their licenses within two weeks.

[ [Return to Roster](#) ] [ [Manage User Account](#) ] [ [Logout](#) ]

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# Public Accounting Firms Only: Editing Firm Contact Info

(After signing in and entering your firm number, click the “Edit Contact Information” link—see page 4.)

1.



## Firm Login

Enter the firm's password. You can find this password in the mailer from the Board of Accountancy. You can contact the Board if you have forgotten your password or would like it changed.

Password for FR-0416

[Change Contact Info >](#)

*Enter password you received from ISBA. Call the State Board if you forgot your password or would like it changed.*

2.



## Bulk Renewals - FR-0416

Fields marked with \* are required

*Edit your firm's contact information*

Contact Person	<input type="text" value="DANIEL BOONE"/>
Street*	<input type="text" value="999 EASY ST STE 990"/>
City*	<input type="text" value="BOISE"/>
State*	<input type="text" value="Idaho"/>
Zip Code*	<input type="text" value="97222"/>
Phone*	<input type="text" value="(206 ) 621 -1800"/> ext: <input type="text"/>
Fax	<input type="text" value="(206 ) 654 -7799"/> ext: <input type="text"/>
Email	<input type="text" value="bill@accessidaho.org"/>

[Save Changes >>>](#)

3.



## Updated Your Contact Information

Your Changes Have Been Saved

*Click to resume license renewals.*

[\[ Return to Roster \]](#)

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