Welcome to the new ISBA Online Services system

Steps for using the new online system:

Go to: dopl.idaho.gov

Click on: CPE - Information

and Reporting

To log into the system, you will need:

1) The email address on file with the Board office

2) Your PIN/Password

OPTIONS:

Available throughout the year.

- Summary of your Idaho License

- Address Changes

- Change License Status

- Report CPE

- Request an Exception

- Upload Documents

  One (1) PDF, JPG or PNG file containing CPE audit or exemption documents.

- **Print CPE Report * NEW***

  This allows you to see the most recent submitted CPE report.

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
☐ ✓ ▬▬▬	▬▬▬	▬▬▬	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 appropiate action from below.

| Renew License | Pay Fines | Report CPE | | Upload Document | Address Changes | Exit |
| Change Status | Print CPE Report | | | | | |

NEW Feature!

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.

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: ▮▮▮▮▮▮▮▮▮▮   Number: ▮▮▮▮▮

Type: Certified Public Accountant

Expires: 6/30/2021

Issue Date: ▮▮▮▮▮

* (This is your MAILING address)   * (This is your ALTERNATE address.)

Mailing Line 1: ▮▮▮▮▮▮▮▮▮   Alternate Line 1: ▮▮▮▮▮▮▮▮

Line 2:   Line 2:

Country: USA - USA   Country: USA - USA

Zip: 83714 2375   Zip: 83714 2375

City/State: Boise ID   City/State: Boise ID

In Care Of:

Work Phone: ▮▮▮▮▮▮▮   eMail: ▮▮▮▮▮▮▮▮

Ext: Alternate Email:

Home Phone: ▮▮▮▮▮▮

Cell Phone: ▮▮▮▮▮▮   Fax:

More Licenses   Save Changes   Close

Change Status Screen

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

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

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 thruth and accuracy of all statements, answers and representations in this report.

Requested License Status | Inactive

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.

- In the middle of the screen 'Report a CPE Course (XXXX)' indicates the year that the CPE courses must have been completed.

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

- **NOTE: the amount of ethics is a component of your total CPE Hours required and should be recorded in the Ethics Hours field only.**

- 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 1st/December 31st'

- 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.

- Exiting the system - If you want to leave the system without submitting your report click on the 'Close/Cancel' button

- **If you didn't complete your CPE** requirement you will need to request an extension or change your license status. ****Scroll down for more details.**

	License No	██████		
	License Name	██████		
	Issued / Expires / Status	██████	6/30/2021	Active

	CPE Hours	Ethics Hours	CPE Status
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	
Delivery Method	Blended
Title of Program	
Sponsor	
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	
Delivery Method	Blended
Title of Program	
Sponsor	
CPE Hours	0
Ethics Hours	0

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 - <u>**non ethics hours**</u>

- **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 -** 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 -** 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 -** 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 -** 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	☐
11/27/2020	Self Study	Ethics for Idaho	ISCPA	0.00	2.00	2.00	☐
				Totals ==> 6.00	2.00	8.00	

Delete Courses

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: 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.

isba.idaho.gov says

Are you sure that you want to SUBMIT the CPE Report?

OK Cancel

PRINT: The moment you click OK, you will be taken to a new tab. This tab is your copy of your submitted report. Save a copy of this report for five (5) years as per Idaho Accountancy Rules.

Online Services (CPE Reporting) ✕   CPE REPORT SHEET ✕   +

🔒 isba.idaho.gov/ISBAServices/CPEReportConfirm.aspx

OK: You will see this next message when you click into the Online Services tab to the right of the CPE REPORT SHEET tab.

isba.idaho.gov says

** Information: CPE Report Submitted **

OK
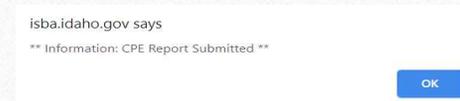
At the top of the Online Services page, you will see this message: ** Information: CPE Report Submitted **

At the center of the page, you will see what you owe for the next year and what year you can now record completed courses.

	CPE Hours	Ethics Hours	CPE Status
Credited for Previous Year	39.00	2.00	Complete
Required for Current Year	41.00	2.00	Required

Report a CPE Course (2021)

Attended / Completed	
Delivery Method	Blended
Title of Program	
Sponsor	
CPE Hours	0
Ethics Hours	0

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

** CPE Status DOES NOT allow for Course Data Entry **

If you receive this message, you may have already submitted your CPE report.

Call or email the Board office if you need to access your submitted report.

Or if you need to make a change to your submitted report,

Upload Document Screen

- Currently this page is only available for CPE audit or exemption documentation.

- Only one (1) PDF, JPG, or PNG formatted document can be attached.

- The system auto generates the reference and document number.

- Your short title should read: 2021CPE EXT for CP-XXXX or 2021 CPE Audit for CP-XXXX.

- Click the 'Attach Document' button. You will receive a message that your document has been received.

- Then click the 'Close' button to exit the screen.

- The Board office will reach out to you if there are any issues.

- Once the audit or exemption is complete you will receive written notification by email confirming that your CPE has been accepted.

Reference Number	LICISBACP3950
Licensee Name	▮▮▮▮▮
Document Reference	CES531596

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 File | No file chosen

Enter a short description of this document

Attach Document

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

Close

Didn't complete your CPE requirement?

You have two options:

Option 1)
Change your license status to a non-active through our online system.

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 24.30.01.113.02

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 24.30.01.113.02.

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. Refer to IDAPA Rule 24.30.01.108.02.

You may bring your license back into Active status by completing the reinstatement/re-entry process at any time by 1) completing the reinstatement/re-entry application, 2) submit 80 hours of CPE, of which four hours need to be ethics with two covering Idaho Accountancy Act and Rules, and 3) pay the reinstatement/re-entry fee. Contact the Board office for the fee amount. Refer to IDAPA Rule 24.30.01.117.

**Any request not filed timely is subject to the late fees prescribed in Rule 400, in addition to any administrative action.

Option 2) **Request an Exception**

Extension - The Board may grant extensions of time for completion of the CPE requirements, where reasons of health as certified by a medical doctor prevent compliance by the licensee, or other good cause exists.

Exception - The Board may make exceptions to the CPE requirements, where reasons of health as certified by a medical doctor prevent compliance by the licensee.

Exemption - Licensees who elect inactive, retired or lapsed status are exempt from any CPE requirements. Request to change your license status through our online system.

**Any request not filed timely is subject to the late fees prescribed in Rule 400, in addition to any administrative action.

To request an Exception - log into your CPE report, record any courses you did complete, click 'submit'. You will be taken to the exception request page where you need to identify what exception you are requesting and give a short explanation for your request. If you are seeking an exception due to a medical issue a doctor's note is required to be submitted into the Board office, no later than February 28th. Make sure to submit this request and print a copy for your records.

Immediately begin working towards completing your shortage and penalty CPE credit hours. The system will calculate your shortage, and penalty CPE credits that need to be submitted into the Board office ASAP, no later than April 30th to be eligible for active renewal.

A penalty of fifty percent (50%) of the hours a licensee is short will be assessed. All CPE supporting documentation is required to be submitted into the Board office for review no later than April 30th to avoid late penalty fines.

Sample of Exception request page

System auto calculates your shortage and penalty CPE and gives you the total amount of CPE due into the Board office prior to April 30th.

In this box - identify what exception you are requesting and give a short explanation for your request.

Instructions on how to complete your extension request.

Make sure to click 'Confirm Extension' to submit your request.

** You have not met your required CPE credit hours **

License No [REDACTED]
License Name [REDACTED]
Issued / Expires / Status [REDACTED] 6/30/2021 Active

	Total Hours	Ethics Hours	CPE Status
Credited for Previous Year	41.00	2.00	Complete
Required for Current Year	39.00	2.00	Required
Recorded CPE to Date	.00	0.00	
SHORT	39.00	2.00	
PENALTY	19.50	1.00	
DUE	58.50	3.00	

Instructions:
If you have reached this page in error, click the 'Back' button to review and/or add courses.

Extensions of time to complete your CPE requirement due to illness or other good cause may be granted by the Board, per IDAPA 24.30.01.402.01. All requests are subject to Board approval and assessed penalty CPE credit hours. (Penalty credit hours are assessed at ½ of the amount of the shortage. i.e. short 2, penalty 1, owe total of 3.) Extensions are subject to a full audit requiring documentation to be submitted prior to April 30th to be eligible for Active renewal in the upcoming licensing cycle.

Explanation for extension/exception request is required. Certification of health issue to be proved by you from your medical doctor by February 28th.

By clicking the Confirm Extension button you certify to the thruth and accuracy of all statements, answers and representations in this report.

CPE Extension submission instructions:

Prior to April 30th:

1) Complete shortage and penalty credits required.
2) Gather all certificates into one (1) file, your file needs to include the certificates of courses completed for the reporting year, shortage, penalty courses, and a copy of the CPE Extension Reporting Form.
3) Upload the file, using the 'Upload Documents' button found on the main page.

Courses Completed January 1st / December 31st(2021)

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

Back to Reporting   Confirm Extension   Close/Cancel