

**NMRLD**

**NMRLD**

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**Applying for a New License (Public Accountancy  
Board) Quick Reference Guide**

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### OVERVIEW

This Quick Reference Guide for the New Mexico Regulation and Licensing Department explains how to use the RLD public portal to create a new license for the Public Accountancy Board.

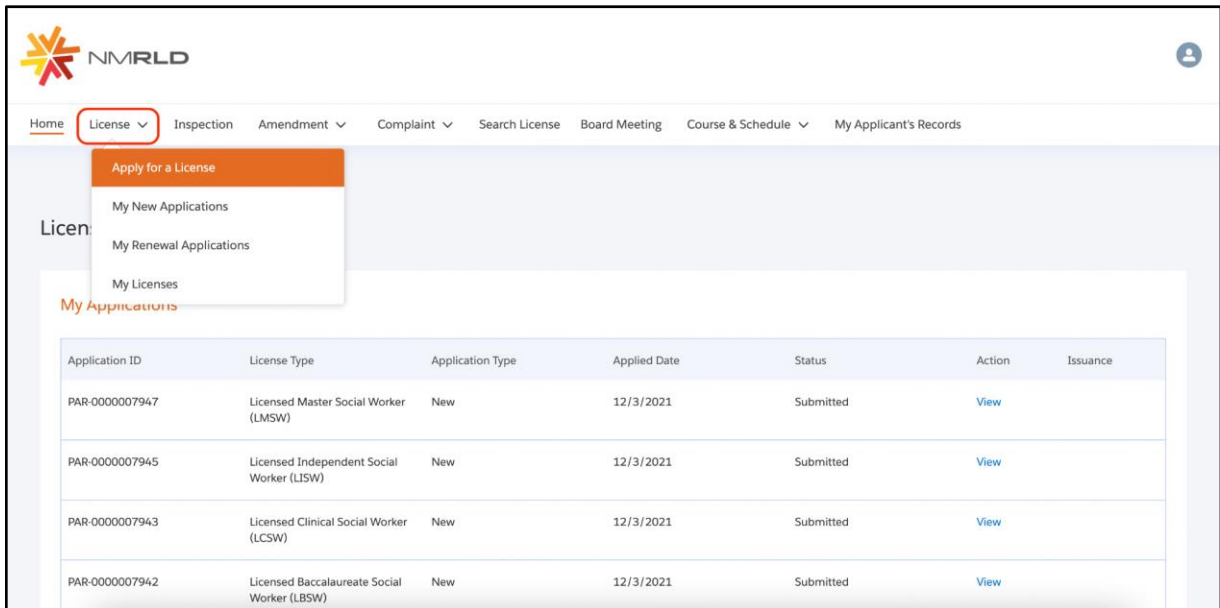
### AVAILABLE LICENSES

The following are the list of licenses available under the Public Accountancy Board.

1. Certified Public Accountant
2. Firm Permit

### APPLYING FOR A NEW LICENSE

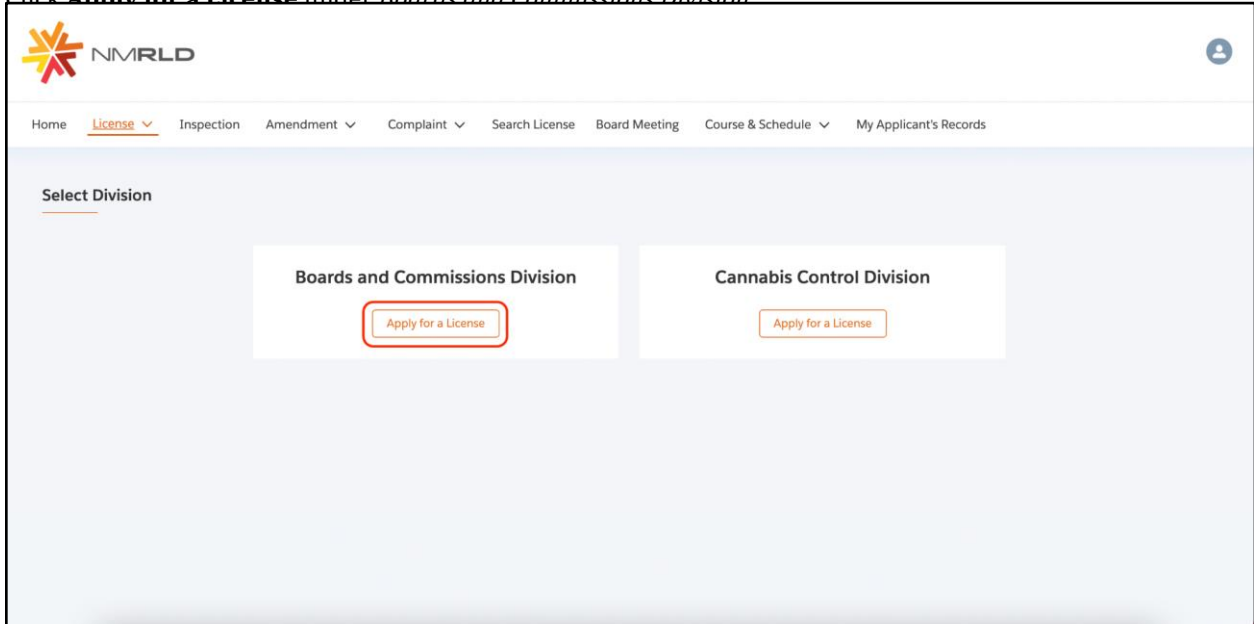
- 1) Log in to the RLD Licensing Public Portal. Navigate to the **License** tab. Click **Apply for a License**.



The screenshot shows the NMRLD Licensing Public Portal interface. The 'License' tab is selected in the top navigation bar. A dropdown menu is open under the 'License' tab, showing the option 'Apply for a License' in an orange box. Below the dropdown, there is a section titled 'My Applications' with a table of application records.

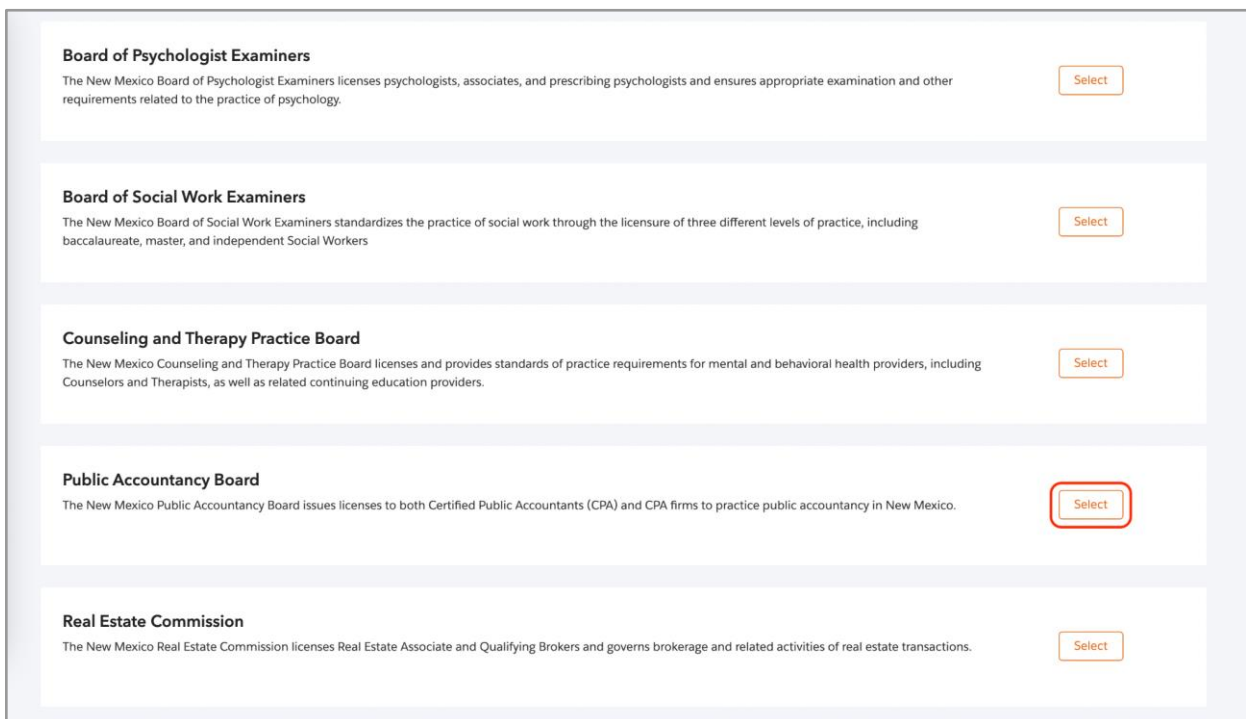
Application ID	License Type	Application Type	Applied Date	Status	Action	Issuance
PAR-000007947	Licensed Master Social Worker (LMSW)	New	12/3/2021	Submitted	<a href="#">View</a>	
PAR-000007945	Licensed Independent Social Worker (LISW)	New	12/3/2021	Submitted	<a href="#">View</a>	
PAR-000007943	Licensed Clinical Social Worker (LCSW)	New	12/3/2021	Submitted	<a href="#">View</a>	
PAR-000007942	Licensed Baccalaureate Social Worker (LBSW)	New	12/3/2021	Submitted	<a href="#">View</a>	

2) Click **Apply for a License** under *Boards and Commissions Division*



The screenshot shows the NMRLD website interface. At the top is the NMRLD logo and a navigation bar with links: Home, License (dropdown), Inspection, Amendment (dropdown), Complaint (dropdown), Search License, Board Meeting, Course & Schedule (dropdown), and My Applicant's Records. Below the navigation bar is a 'Select Division' section. It contains two main boxes: 'Boards and Commissions Division' and 'Cannabis Control Division'. Each box has an 'Apply for a License' button. The 'Apply for a License' button under 'Boards and Commissions Division' is highlighted with a red rectangle.

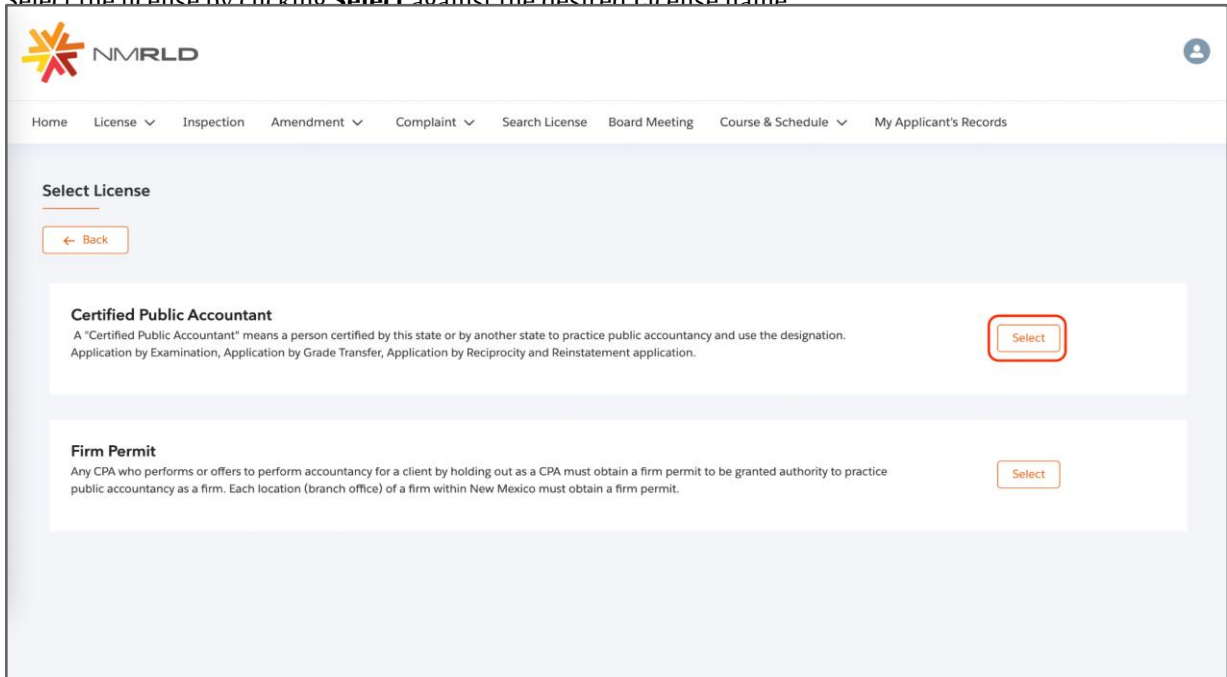
3) Click **Select** against *Public Accountancy Board*.



The screenshot shows a list of boards on the NMRLD website. Each board entry includes a title, a brief description, and a 'Select' button. The boards listed are: Board of Psychologist Examiners, Board of Social Work Examiners, Counseling and Therapy Practice Board, Public Accountancy Board, and Real Estate Commission. The 'Select' button for the 'Public Accountancy Board' is highlighted with a red rectangle.

Board Name	Description	Action
Board of Psychologist Examiners	The New Mexico Board of Psychologist Examiners licenses psychologists, associates, and prescribing psychologists and ensures appropriate examination and other requirements related to the practice of psychology.	Select
Board of Social Work Examiners	The New Mexico Board of Social Work Examiners standardizes the practice of social work through the licensure of three different levels of practice, including baccalaureate, master, and independent Social Workers	Select
Counseling and Therapy Practice Board	The New Mexico Counseling and Therapy Practice Board licenses and provides standards of practice requirements for mental and behavioral health providers, including Counselors and Therapists, as well as related continuing education providers.	Select
Public Accountancy Board	The New Mexico Public Accountancy Board issues licenses to both Certified Public Accountants (CPA) and CPA firms to practice public accountancy in New Mexico.	Select
Real Estate Commission	The New Mexico Real Estate Commission licenses Real Estate Associate and Qualifying Brokers and governs brokerage and related activities of real estate transactions.	Select

### 4) Select the license by clicking **Select** against the desired License name



**Select License**

[← Back](#)

**Certified Public Accountant**  
A "Certified Public Accountant" means a person certified by this state or by another state to practice public accountancy and use the designation. Application by Examination, Application by Grade Transfer, Application by Reciprocity and Reinstatement application.

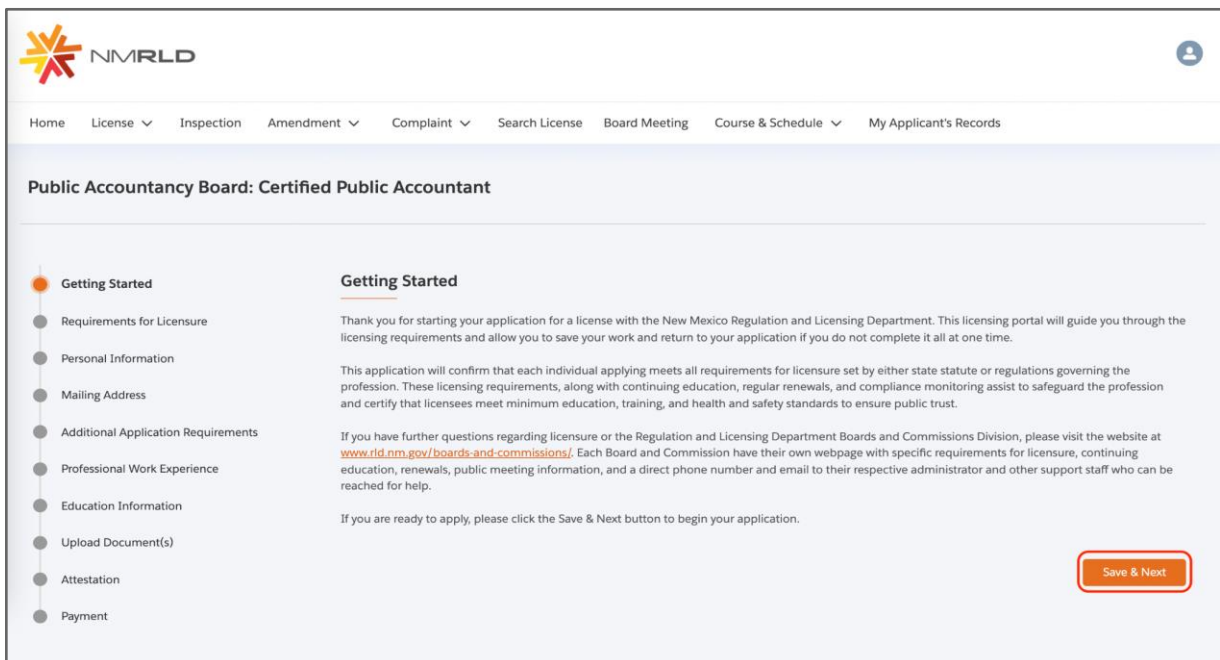
**Select**

**Firm Permit**  
Any CPA who performs or offers to perform accountancy for a client by holding out as a CPA must obtain a firm permit to be granted authority to practice public accountancy as a firm. Each location (branch office) of a firm within New Mexico must obtain a firm permit.

**Select**

## APPLICATION STEPS

- 1) You are about to initiate the application process. Read the *Getting Started* section carefully.  
Click **Save & Next**.



**Public Accountancy Board: Certified Public Accountant**

**Getting Started**

Thank you for starting your application for a license with the New Mexico Regulation and Licensing Department. This licensing portal will guide you through the licensing requirements and allow you to save your work and return to your application if you do not complete it all at one time.

This application will confirm that each individual applying meets all requirements for licensure set by either state statute or regulations governing the profession. These licensing requirements, along with continuing education, regular renewals, and compliance monitoring assist to safeguard the profession and certify that licensees meet minimum education, training, and health and safety standards to ensure public trust.

If you have further questions regarding licensure or the Regulation and Licensing Department Boards and Commissions Division, please visit the website at [www.rld.nm.gov/boards-and-commissions/](http://www.rld.nm.gov/boards-and-commissions/). Each Board and Commission have their own webpage with specific requirements for licensure, continuing education, renewals, public meeting information, and a direct phone number and email to their respective administrator and other support staff who can be reached for help.

If you are ready to apply, please click the Save & Next button to begin your application.

**Save & Next**

- 2) In the *Requirements for Licensure* step, Select ***How are you applying?*** from the drop-down list. Fill in or select the fields that appear based on your selection. Select **Yes/No** for *Expedited Military Licensure*.

Once all of the required fields have been filled in, click **Save & Next**.

**Note:** If you choose Yes for *Expedited Military License*, the application fees will be waived.

Public Accountancy Board: Certified Public Accountant

PAR-0000010849

Getting Started

Requirements for Licensure

Personal Information

Mailing Address

Additional Application Requirements

Professional Work Experience

Education Information

Upload Document(s)

Attestation

Payment

Requirements for Licensure

You have selected to apply for a New Mexico Certified Public Accountant license. The requirements will vary based on your CPA application path (examination, reciprocity, grade transfer or reinstatement). Select documents will be uploaded during the application process, others will be sent directly to the board. Details specific to each application type can be found on the Board website at: <https://www.rls.nm.gov/boards-and-commissions/individual-boards-and-commissions/accountancy/accountancy-applications-and-forms/>. The following is a list of possible application documents, requirements are based on your application type.

- Fingerprint background check
- Official Transcripts: Bachelor's degree with a minimum 150 semester hours including 30 hours in accounting
- Successful completion of all four parts of the CPA exam
- Experience Verification Form
- Interstate notification of verifying CPA's License
- Interstate verification of Examination scores
- AICPA Ethics Exam
- CPE (reinstatement or reciprocity only)
- Documentation of New Mexico Residency (Grade Transfer only)

\*How are you applying?

Application by Reciprocity

Licensure By Credentials/Reciprocity

An individual who holds an active CPA license in good standing in another state may be eligible for a New Mexico license. What state do you hold an active license in good standing in?

\*What state do you hold an active license in?

<input type="checkbox"/> Alabama	<input type="checkbox"/> Alaska	<input type="checkbox"/> American Samoa	<input type="checkbox"/> Arizona
<input type="checkbox"/> Arkansas	<input type="checkbox"/> California	<input checked="" type="checkbox"/> Colorado	<input type="checkbox"/> Connecticut
<input type="checkbox"/> Delaware	<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Florida	<input type="checkbox"/> Georgia
<input type="checkbox"/> Guam	<input type="checkbox"/> Hawaii	<input type="checkbox"/> Idaho	<input type="checkbox"/> Illinois
<input type="checkbox"/> Indiana	<input type="checkbox"/> Iowa	<input type="checkbox"/> Kansas	<input type="checkbox"/> Kentucky
<input type="checkbox"/> Louisiana	<input type="checkbox"/> Maine	<input type="checkbox"/> Maryland	<input type="checkbox"/> Massachusetts
<input type="checkbox"/> Michigan	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Missouri
<input type="checkbox"/> Montana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Nevada	<input type="checkbox"/> New Hampshire
<input type="checkbox"/> New Jersey	<input type="checkbox"/> New Mexico	<input type="checkbox"/> New York	<input type="checkbox"/> North Carolina
<input type="checkbox"/> North Dakota	<input type="checkbox"/> Northern Mariana Islands	<input type="checkbox"/> Ohio	<input type="checkbox"/> Oklahoma
<input type="checkbox"/> Oregon	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Puerto Rico	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> South Carolina	<input type="checkbox"/> South Dakota	<input type="checkbox"/> Tennessee	<input type="checkbox"/> U.S. Virgin Islands
<input type="checkbox"/> Texas	<input type="checkbox"/> Utah	<input type="checkbox"/> Vermont	<input type="checkbox"/> Virginia
<input type="checkbox"/> Washington	<input type="checkbox"/> West Virginia	<input type="checkbox"/> Wisconsin	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Other Country			

\*Please include the license(s) name/type, status, and number.

LIC1245

Please continue and complete your application, and it will be reviewed to determine if you qualify and satisfy the requirements for license by credentials.

Expedited Military Licensure

\*Are you a military service member, veteran, or a military spouse or child/dependent?

No

A military service includes active duty, active reserve or active national guard. A veteran means a person who has received an honorable discharge or separation from military service. A military spouse means a spouse of an active military service member or a surviving spouse of a member who was serving on active duty at the time of death. A military child means a dependent child of an active military service member who is claimed as a dependent for federal income tax purposes.

In order to determine if you satisfy for expedited military licensure under state law, you will be required to submit documents to show your status as a military service member, veteran, or military spouse or child, as well as information of your current license in good standing.

If you satisfy these requirements and submit the necessary supporting documents, the licensing fee will be waived for three (3) years and the license will be issued within thirty (30) days of submitting a complete application. Incomplete applications will not be accepted, and rejected applications may have to apply through reciprocity or as a new applicant.

Professional Fitness

\*Have you ever lost the authorization to practice before the SEC, the PCAOB, the IRS, or another state board of accountancy, or a federal or state taxing, insurance or securities regulatory authority, or a foreign authority or credentialing body that regulates the practice of accountancy?

No

\*Have you ever participated in any conduct reflecting adversely upon the applicant's or licensee's fitness to engage in practice?

No

\*Have you engaged in dishonesty, fraudulent or grossly negligent acts while practicing public accountancy?

No

\*Have you engaged in dishonesty, fraudulent or grossly negligent acts while filing your own federal, state, local, or other income tax returns?

No

\*Have you engaged in dishonesty, fraudulent or grossly negligent acts while filing a client or anyone else's federal, state, local, or other income tax returns?

No

Previous

Save & Next

3) The *Personal Information* section will be pre-populated. To edit personal information, click **My Profile**

**Personal Information**

Please carefully verify your contact information is current and correct, using your legal name.

Communication regarding licensing and renewals are sent through email, and any official legal communication regarding complaints and discipline will be sent to the mailing address on file. It is required that every applicant and licensee maintain a current mailing address with the board where mail is checked regularly.

**Name changes or other updates to your personal information cannot be processed on this page. Any such changes must be made by clicking on the 'My profile' button below, supporting documents may be requested.**

**My Profile**

Owner/Primary Contact First Name: Jamie

Owner/Primary Contact Middle Name:

Owner/Primary Contact Last Name: Montoya

Date of Birth: 1989-12-28

Primary Phone Number:

Contact Number - Home: (505) 000-0000

Contact Number - Work:

Personal Email: bwbt024@gmail.com

Have you ever used another name under which records relating to your application, education, training or experience may be filed?

[Previous](#) [Save & Next](#)

a) To make changes to your personal information, click **Edit**. Update the Email Address and click **Save**.

**Note:**

- You can update only the email address in your profile
- You will receive an email requesting confirmation about changing the email address. Once you confirm, the RLD application will update your email address

My Profile

Professional Education

My Profile

Personal Information

Pronoun

First Name

Middle Name

Last Name

Suffix

They

Jamie

Montoya

To update your email address, click Edit, enter the new email address, and click Save then check your inbox for a confirmation email and click the link to confirm this change.

Email Address

Date of Birth

bwbt024@gmail.com

12/28/1989

Have you ever used another name under which records relating to your application, education, training or experience may be filed?

Mailing Address

Mailing Address Line 1

Mailing Address Line 2

2550 Cerrillos rd

Mailing City

Mailing State

Mailing County

Mailing Zip Code

Santa Fe

NM

Santa Fe

87506

Mailing Country

Primary Phone Number

US

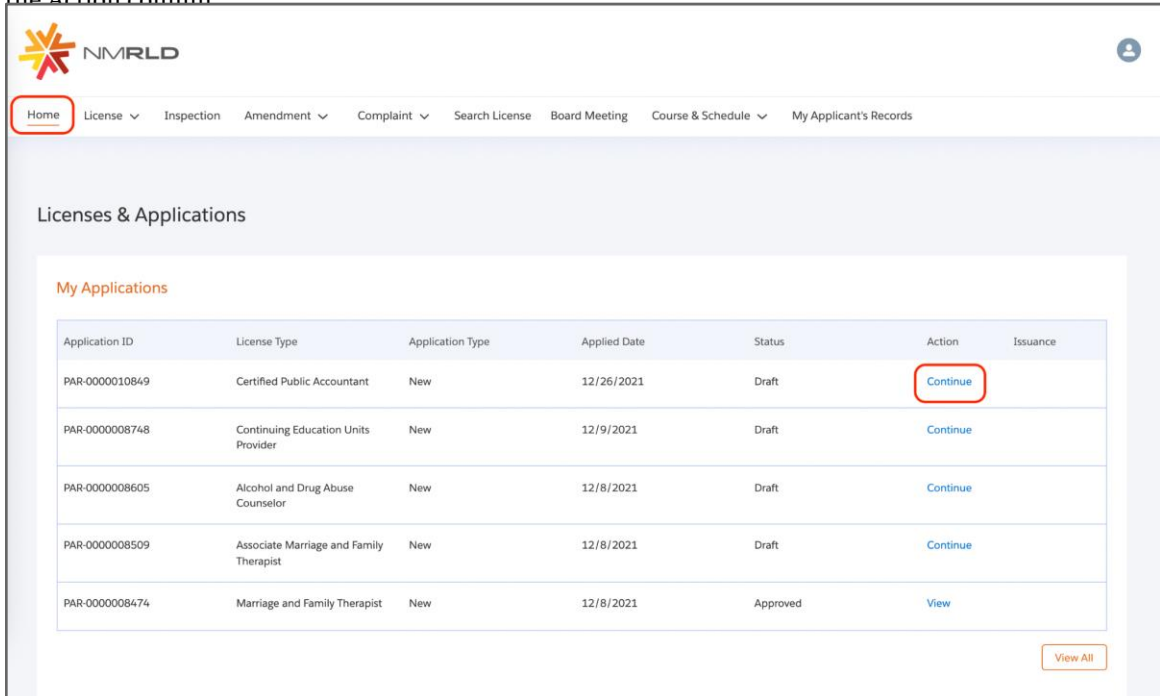
(505) 000-0000

Cell Phone Number

Business Phone Number

Edit

- b) Click **Home** and identify your application in the **My Applications** section and click **Continue** under the Action column



The screenshot shows the NMRLD website interface. The navigation bar at the top includes links for Home, License, Inspection, Amendment, Complaint, Search License, Board Meeting, Course & Schedule, and My Applicant's Records. The 'Home' link is highlighted with a red box. Below the navigation bar, the 'Licenses & Applications' section is displayed. Under this section, there is a 'My Applications' table. The table has columns for Application ID, License Type, Application Type, Applied Date, Status, Action, and Issuance. The first row of the table shows an application with ID PAR-0000010849, License Type Certified Public Accountant, Application Type New, Applied Date 12/26/2021, Status Draft, and Action Continue. The 'Continue' link in the Action column is highlighted with a red box. Other applications listed include Continuing Education Units Provider, Alcohol and Drug Abuse Counselor, Associate Marriage and Family Therapist, and Marriage and Family Therapist. A 'View All' button is located at the bottom right of the table.

Application ID	License Type	Application Type	Applied Date	Status	Action	Issuance
PAR-0000010849	Certified Public Accountant	New	12/26/2021	Draft	<a href="#">Continue</a>	
PAR-0000008748	Continuing Education Units Provider	New	12/9/2021	Draft	<a href="#">Continue</a>	
PAR-0000008605	Alcohol and Drug Abuse Counselor	New	12/8/2021	Draft	<a href="#">Continue</a>	
PAR-0000008509	Associate Marriage and Family Therapist	New	12/8/2021	Draft	<a href="#">Continue</a>	
PAR-0000008474	Marriage and Family Therapist	New	12/8/2021	Approved	<a href="#">View</a>	

[View All](#)

- c) The application will open from the Getting Started step. Navigate to the Personal Information step and click **Save & Next**.

The screenshot shows the 'Personal Information' step of the application process. On the left is a vertical progress bar with steps: Getting Started (checked), Requirements for Licensure (checked), **Personal Information** (active), Mailing Address, Education Information, Additional Application Requirements, Supervisor Information, Upload Document(s), Attestation, and Payment. The main content area has a title 'Personal Information' and a warning box stating: 'Please carefully input and verify that all contact information is current and correct. Communication regarding licensing and renewals may be sent through email, and any official legal communication regarding complaints and discipline will be sent to the mailing address on file. It is required that every applicant and licensee maintain a current mailing address with the board where mail is checked regularly. Name changes or other updates to your personal information cannot be processed on this page. Any such changes must be made by clicking on the 'My profile' button below.' Below the warning is a 'My Profile' button. The form fields are: First Name (Jamie), Middle Name (empty), Last Name (Montoya), Date of Birth (12/28/1989), Primary Phone Number ((505) 000-0000), Cell Phone Number (empty), Business Phone Number (empty), Email (bwbt024@gmail.com), and a checkbox for 'Have you ever used another name under which records relating to your application, education, training or experience may be filed?' (unchecked). At the bottom right are 'Previous' and 'Save & Next' buttons.

- 4) The Mailing Address section is pre-populated. You may update the information if required. Click **Save & Next**.

The screenshot shows the 'Mailing Address' step of the application process. The header reads 'Public Accountancy Board: Certified Public Accountant' with the ID 'PAR-0000010849'. The left progress bar shows: Getting Started (checked), Requirements for Licensure (checked), Personal Information (checked), **Mailing Address** (active), Additional Application Requirements, Professional Work Experience, Education Information, Upload Document(s), Attestation, and Payment. The main content area has a title 'Mailing Address' and a warning box stating: 'Please confirm that your contact information is accurate and up to date. Licensees are required to maintain a current mailing address for receiving official and legal mail.' Below the warning are the following fields: \* Mailing Address Line 1 (2550 Cerrillos rd), Mailing Address Line 2 (empty), \* Mailing City (Santa Fe), \* Mailing County (Santa Fe), Mailing State (New Mexico), \* Mailing Zip (87506), and \* Mailing Country (United States). At the bottom right are 'Previous' and 'Save & Next' buttons.

- 5) In the *Additional Application Requirements* step, select **Yes/No** as applicable, fill in the necessary information, and click **Save and Next**

The screenshot shows the 'Additional Application Requirements' step of the application process. On the left is a vertical progress bar with steps: Getting Started, Requirements for Licensure, Personal Information, Mailing Address, **Additional Application Requirements** (highlighted with an orange dot), Professional Work Experience, Education Information, Upload Document(s), Attestation, and Payment. The main content area is titled 'Additional Application Requirements' and includes a note: 'List all states you have been or hold a current license, and if you are current with the CPE reporting requirements of each state. Note: You are required to upload a copy of each license.' The form contains several fields: 'State of Issuance' (a dropdown menu with 'Colorado' selected), 'Certificate Number' (a text input field), 'Date of Issuance' (a date picker), and 'Expiration Date' (a date picker). Below these are three questions, each with 'Yes' and 'No' radio buttons: 1. '\* Have you ever been subject to disciplinary action by a regulatory Board?' 2. '\* Have you contacted the State that holds your current license to request verification be sent to the NM Board?' 3. '\* Do you have at least one year (part time or full time experience totally two thousand (2,000) hours earned over a period of no more than three years) of experience providing service or advice involving the use of accounting, attest, management advisory, financial advisory, tax, or consulting skills?' Below the third question is a text input field labeled 'Experience less than one year?'. At the bottom right are two buttons: 'Previous' and 'Save & Next' (which is highlighted with a red border).

- 6) In the *Professional Work Experience* step, **Add Work Experience** details and select the appropriate **Employer Category** and **Areas of Experience** checkboxes. Click **Save & Next**.

Public Accountancy Board: Certified Public Accountant

PAR-0000010849

Getting Started

Requirements for Licensure

Personal Information

Mailing Address

Additional Application Requirements

Professional Work Experience

Education Information

Upload Document(s)

Attestation

Payment

Professional Work Experience

Professional Accounting Experience

Please list your relevant accounting experience.

An applicant for initial issuance, grade transfer or reciprocity if licensed less than two years of a Certified Public Accountant certificate shall show at least one year of experience. This experience shall include:

· Providing service or advice involving the use of accounting

· Attest

· Management advisory

· Financial advisory

· Tax or consulting skills; as verified by a Certified Public Accountant who meets requirements prescribed by the Board.

The experience is acceptable if it was gained through employment in government, industry, academia, or public practice. [1999 Public Accountancy Act, Section 8(H)]

Applicants shall have their experience verified by an active, licensed CPA as defined in the Act. The verifying CPA can be licensed in New Mexico or from another state. One year of experience shall consist of:

· Full or part-time employment that extends over a period of no less than one year and no more than three years.

· Includes no fewer than 2000 hours of performance of services described above [Board Rule: 16.60.3.9 NMAC]

The licensed CPA will be required to submit a verification to the board by USPS or email. This verification must come directly from the CPA verifying the experience. Additional documentation may be required.

Add Work Experience

Employer Name	Employer Address	Employment Start Date	Employment End Date	Position Held	Work Experience	Delete
No Work Experience added !						

Employer Category:

Client practice of public accountancy

Government

Commercial enterprise/industry

Law firm

Education

Other

Areas of Experience:

Accounting

Management advisory

Attest

Financial advisory

Consultation on tax matters

Consulting

Preparation of financial statements and reports

Preparation of tax returns

Consultation, design and/or implementation of computer software involving accounting and auditing

Other

Previous

Save & Next

a) To add work experience information, click **Add Work Experience**.

**Public Accountancy Board: Certified Public Accountant**  
PAR-0000010849

- Getting Started
- Requirements for Licensure
- Personal Information
- Mailing Address
- Additional Application Requirements
- Professional Work Experience**
- Education Information
- Upload Document(s)
- Attestation
- Payment

### Professional Work Experience

**Professional Accounting Experience**

Please list your relevant accounting experience.

An applicant for initial issuance, grade transfer or reciprocity if licensed less than two years of a Certified Public Accountant certificate shall show at least one year of experience. This experience shall include:

- Providing service or advice involving the use of accounting
- Attest
- Management advisory
- Financial advisory
- Tax or consulting skills; as verified by a Certified Public Accountant who meets requirements prescribed by the Board.

The experience is acceptable if it was gained through employment in government, industry, academia, or public practice. [1999 Public Accountancy Act, Section 8(i)]

Applicants shall have their experience verified by an active, licensed CPA as defined in the Act. The verifying CPA can be licensed in New Mexico or from another state. One year of experience shall consist of:

- Full or part-time employment that extends over a period of no less than one year and no more than three years.
- Includes no fewer than 2000 hours of performance of services described above [Board Rule: 16.60.3.9 NMAC]

The licensed CPA will be required to submit a verification to the board by USPS or email. This verification must come directly from the CPA verifying the experience. Additional documentation may be required.

**Add Work Experience**

Employer Name	Employer Address	Employment Start Date	Employment End Date	Position Held	Work Experience	Delete
No Work Experience added !						

b) Fill in the required fields and click **Save**.

**Professional Work Experience**

**Professional Accounting Experience**

Please list your relevant accounting experience.

An applicant for initial issuance, grade transfer or reciprocity if licensed less than two years of a Certified Public Accountant certificate shall show at least one year of experience. This experience shall include:

**Person Experience**

\*Employer Name: test

\*Employer Address: 456 St

\*Employment Start Date: 12-01-2020

\*Employment End Date: 08-28-2021

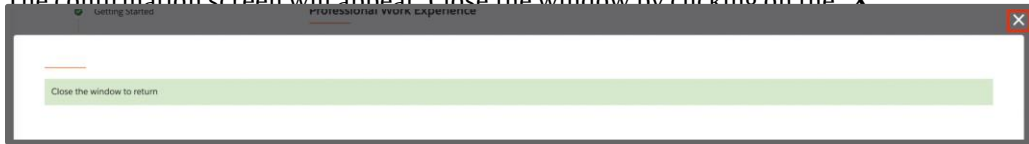
\*Position Held: test

\*Work Experience: test

**Save**

No Work Experience added !

c) The confirmation screen will appear. Close the window by clicking on the "X"



7) The Education Information field will be pre-populated with your information. Verify the information is correct and click **Save & Next** to continue.

Public Accountancy Board: Certified Public Accountant

PAR-0000010849

- Getting Started
- Requirements for Licensure
- Personal Information
- Mailing Address
- Additional Application Requirements
- Professional Work Experience
- Education Information**
- Upload Document(s)
- Attestation
- Payment

### Education Information

The education requirement for licensure is the possession of a bachelor's degree from a regionally accredited college or university and a minimum of one hundred fifty (150) semester credit hours; at least thirty (30) hours must be in accounting. Three (3) of the thirty (30) accounting hours may be in business law.

The official transcripts and exam scores for all individuals who sit for the Uniform CPA examination as qualified New Mexico candidates will be forwarded to the New Mexico Public Accountancy Board by the CPA Examination Services.

Board staff will notify applicants if additional official transcripts are necessary. Grade transfer applicants please send original transcripts to the Board.

Please ensure all education information is correct.

\*Click [here](#) to add or to make changes to your education information. Once done refresh the page to reflect your changes.

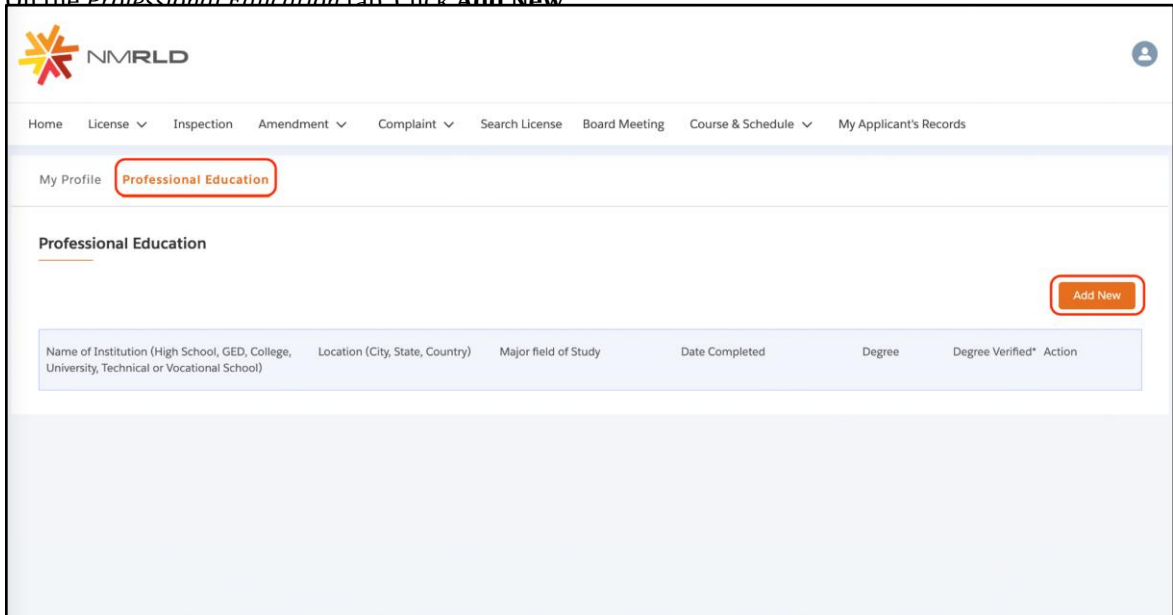
Name of institution/college/university	Major field of Study	Degree	Degree/Date Conferred	Location
RGI	Science	Bachelor's Science	12-03-2021	Russia

Previous

Save & Next

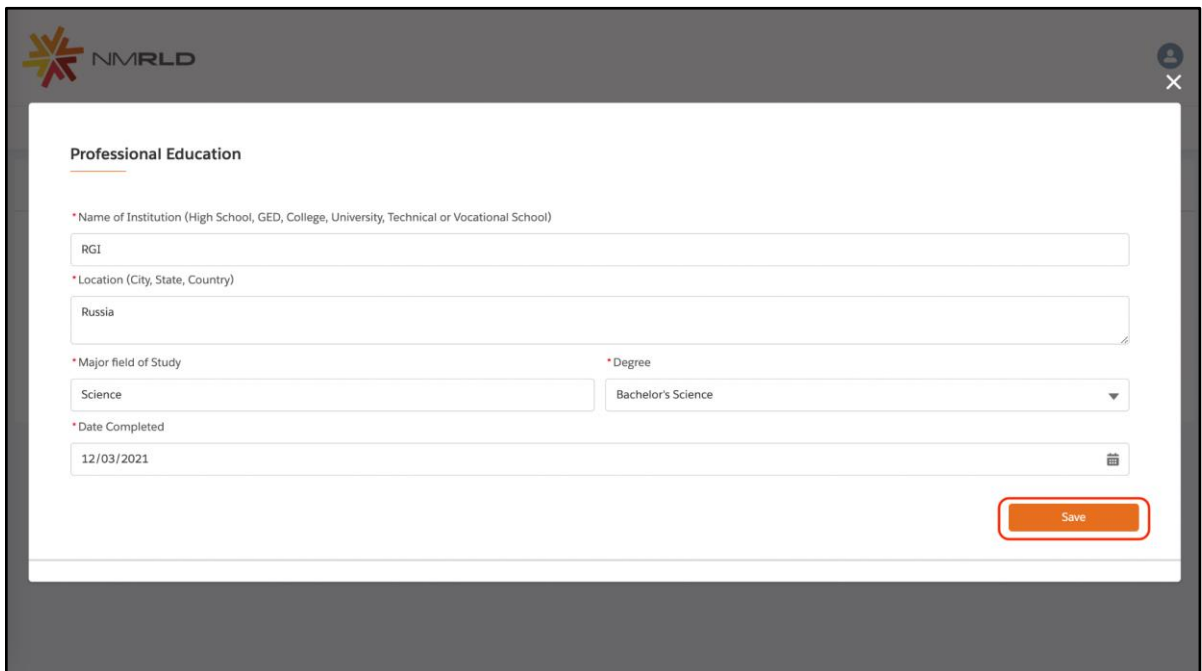
**Note:** To add educational details, click on the '**here**' link to get to the Professional Education tab.

a) On the *Professional Education* tab Click **Add New**



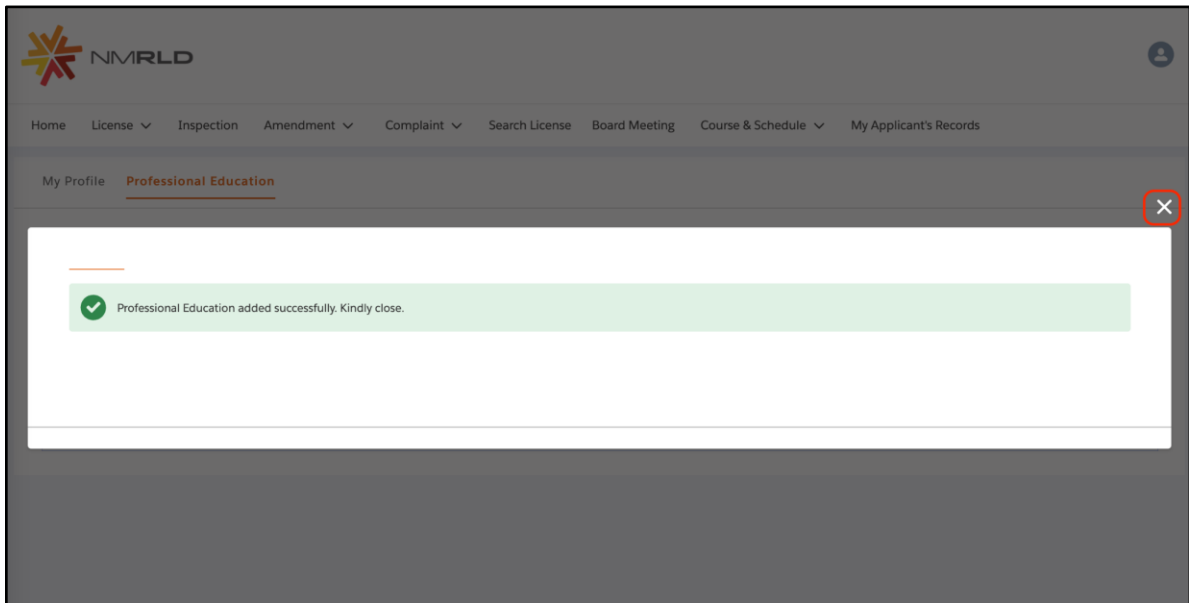
The screenshot shows the NMRLD website interface. The top navigation bar includes links for Home, License, Inspection, Amendment, Complaint, Search License, Board Meeting, Course & Schedule, and My Applicant's Records. The 'Professional Education' tab is selected and highlighted with a red box. Below the tab, there is a table with columns: Name of Institution (High School, GED, College, University, Technical or Vocational School), Location (City, State, Country), Major field of Study, Date Completed, Degree, Degree Verified\*, and Action. A red box highlights the 'Add New' button in the top right corner of the table area.

b) Fill in the required fields and then click **Save**.



The screenshot shows the NMRLD website interface with the 'Professional Education' form filled out. The form fields are: Name of Institution (High School, GED, College, University, Technical or Vocational School) with the value 'RGI'; Location (City, State, Country) with the value 'Russia'; Major field of Study with the value 'Science'; Degree with the value 'Bachelor's Science'; and Date Completed with the value '12/03/2021'. A red box highlights the 'Save' button in the bottom right corner of the form.

- c) The confirmation screen will appear. Close the window by clicking on the “X”.



**Note:** Once the education information has been saved, close the window. Reload the previous page so that new information appears on the screen.

**Important Note:** In the *Requirement for Licensure* step (i.e Step 2) If you select **Application by ReInstatement** from the *How are you applying?* picklist, you must provide continuing education details to proceed further.

*Continuing Education* Step (i.e Step 8) is not applicable for **Application by Examination, Application by Grade Transfer, and Application by Reciprocity.**

### 8) In the Continuing Education step, fill in the necessary information and provide Continuing Education

details

Public Accountancy Board: Certified Public Accountant

PAR-0000010849

Getting Started

Requirements for Licensure

Personal Information

Mailing Address

Additional Application Requirements

Professional Work Experience

Education Information

Continuing Education

Upload Document(s)

Attestation

Payment

Continuing Education

Reinstatement applicants whose license has lapsed shall provide documented evidence of 40 CPE hours for each year the license was expired, not to exceed 200 hours. If the license was expired for longer than 36 months, at least 120 of the hours must have been earned within the preceding 36 months, and at least four (4) of these hours must be in ethics.

A reporting year begins with the first day of the month after your birth month and ends with the last day of your birth month. The Continuing Education Report must include coursework in the preceding 36-month reporting cycle.

"Technical" fields of study are technical subjects that contribute to the maintenance and/or improvement of the competence of a CPA in the profession of accountancy and that directly relate to the CPA's field of business.

**These fields of study include, but are not limited to:**

- Accounting
- Business law
- Management services
- Taxes
- Government accounting
- Economics
- Regulatory ethics
- Auditing
- Finance
- Specialized knowledge
- Government auditing
- Information technology
- Statistics

"Non-technical" fields of study are subjects that contribute to the maintenance and/or improvement of the competence of a CPA in areas that indirectly relate to the CPA's field of business and subject to board determination. These fields of study include, but are not limited to:

- Behavioral ethics
- Business management & organization
- Personal development
- Personnel/human resources
- Communications and marketing
- Production
- Computer software and applications

**ETHICS**

Acceptable ethics topics may include, but are not limited to, instruction focusing on the AICPA code of professional conduct, the New Mexico occupational and professional licensing code of professional conduct applicable to certified public accountants, Treasury Circular 230, malpractice avoidance, organization ethics, moral reasoning, and the duties of the CPA to the public, clients, and colleagues; ethics hours may be earned as part of any professional development program otherwise qualifying under this rule, provided the ethics content and the time devoted to such content are separately identifiable on the program agenda. (Courses should have Ethics in the title or a course outline and documentation must be submitted to substantiate it covered the requisite ethics material.) Non-firm or employer sponsored coursework must be at least 24 Continuing Education hours. Online coursework is acceptable if it meets NASBA standards.

\* Confirm whether you have completed the required Continuing Education.

Yes

You may, but are not required to, upload documentation of your continuing education (e.g. Certificate of Completion). You may complete your renewal without uploading documents.

If you choose to upload documentation, the documents will be reviewed as part of any audit. If you choose not to upload documentation now, you may be asked to provide these documents later in the event that you are selected for audit. Choosing to upload documentation now will not affect processing your renewal or the chance of being selected for audit. You may also use this to provide any additional information regarding your continuing education compliance.

Documents may be uploaded as individual files or as a single merged file on the next page.

Please add all classes for the current reporting cycle using the "Add New" button. The option to submit the certificates is provided on the next screen. If you have not completed your CPE, please complete before submitting your renewal application.

**Enter Total Continuing Education Hours Completed**

[Add New](#)

Course Name or Title	Certificate/Approval Date	Hours	Type	Sub Type	Approved By	Delete
Total Continuing Education - 0						

You have not completed the minimum number of Continuing Education hours in order to proceed - please correct your application.  
120 Total Continuing Education per reporting 36 months

Previous [Save & Next](#)

#### a) To add Continuing Education details, click **Add New**.

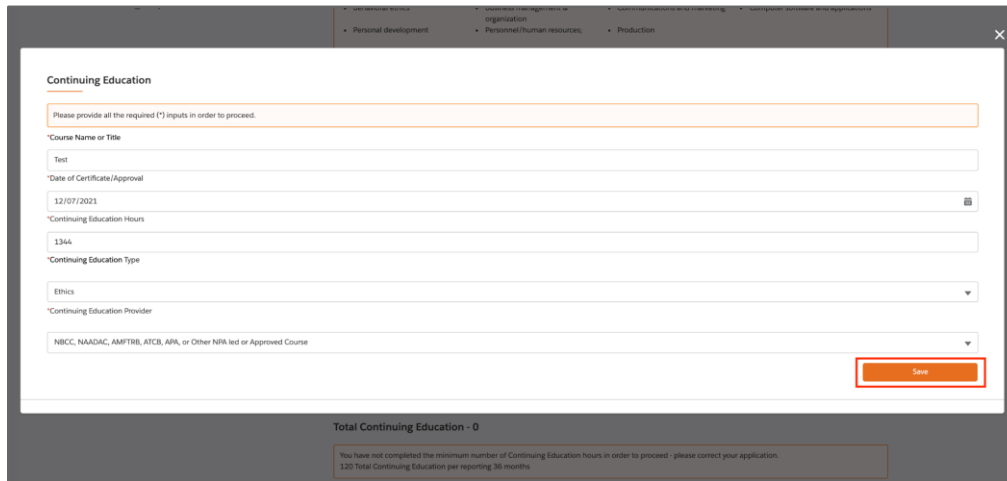
Enter Total Continuing Education Hours Completed

[Add New](#)

Course Name or Title	Certificate/Approval Date	Hours	Type	Sub Type	Approved By	Delete
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18

b) Fill in the required information and click **Save**.

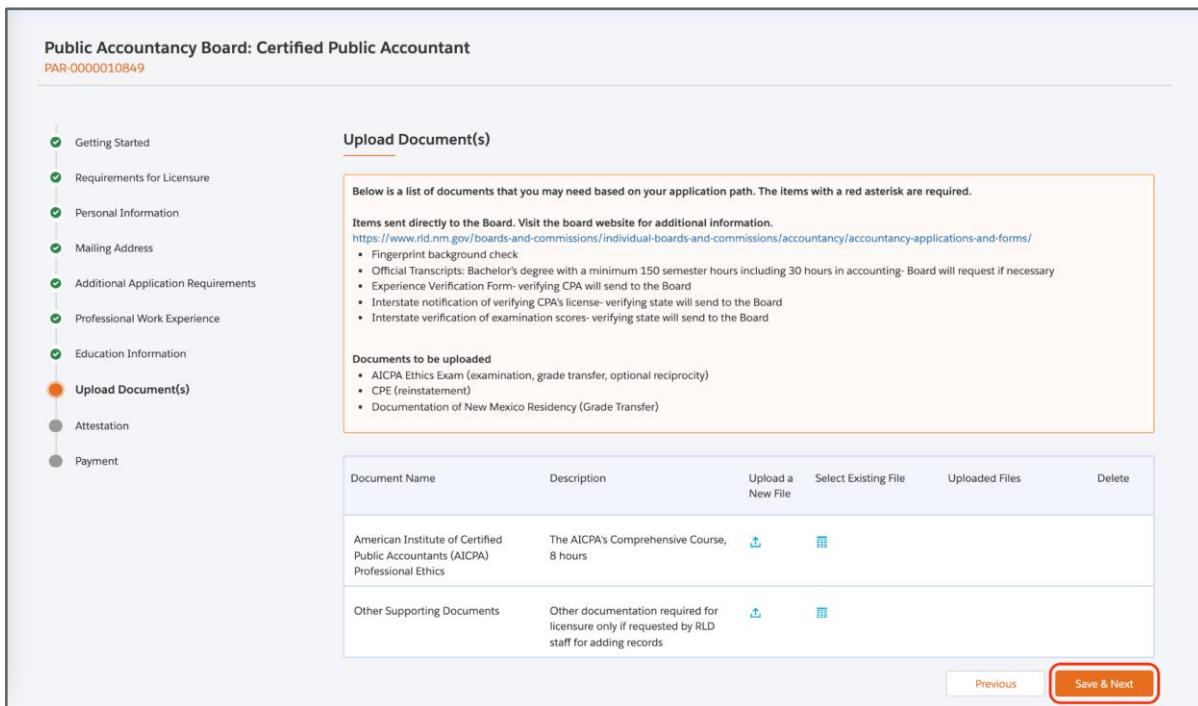


The screenshot shows a 'Continuing Education' form with the following fields:

- \*Course Name or Title:** Text input field.
- \*Date of Certificate/Approval:** Date input field (12/07/2021).
- \*Continuing Education Hours:** Text input field (1344).
- \*Continuing Education Type:** Dropdown menu (Ethics).
- \*Continuing Education Provider:** Text input field (NBCC, NAADAC, AMFTBB, AICPA, or Other NPA led or Approved Course).

A **Save** button is located at the bottom right. Below the form, a status bar indicates 'Total Continuing Education - 0' and a message: 'You have not completed the minimum number of Continuing Education hours in order to proceed - please correct your application. 120 Total Continuing Education per reporting 36 months.'

9) Upload all the necessary documents and click **Save & Next**.



The screenshot shows the 'Public Accountancy Board: Certified Public Accountant' application page. The left sidebar lists the application steps, with 'Upload Document(s)' highlighted. The main content area is titled 'Upload Document(s)' and includes a list of required documents and a table for uploading files.

**Items sent directly to the Board. Visit the board website for additional information.**  
<https://www.rld.nm.gov/boards-and-commissions/individual-boards-and-commissions/accountancy/accountancy-applications-and-forms/>

- Fingerprint background check
- Official Transcripts: Bachelor's degree with a minimum 150 semester hours including 30 hours in accounting- Board will request if necessary
- Experience Verification Form- verifying CPA will send to the Board
- Interstate notification of verifying CPA's license- verifying state will send to the Board
- Interstate verification of examination scores- verifying state will send to the Board

**Documents to be uploaded**

- AICPA Ethics Exam (examination, grade transfer, optional reciprocity)
- CPE (reinstatement)
- Documentation of New Mexico Residency (Grade Transfer)

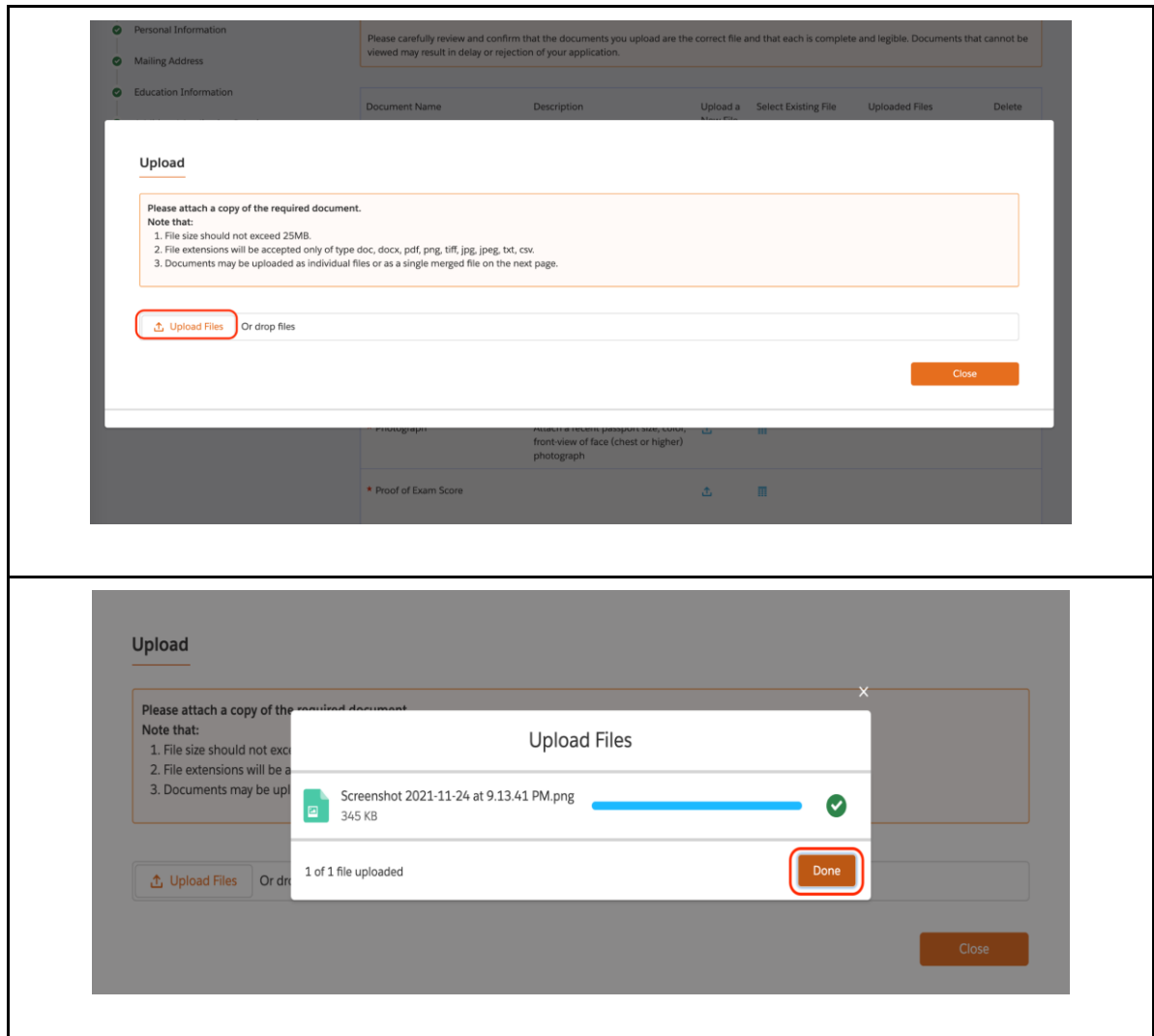
Document Name	Description	Upload a New File	Select Existing File	Uploaded Files	Delete
American Institute of Certified Public Accountants (AICPA) Professional Ethics	The AICPA's Comprehensive Course, 8 hours				
Other Supporting Documents	Other documentation required for licensure only if requested by RLD staff for adding records				

At the bottom right, there are 'Previous' and 'Save & Next' buttons.

### Notes:

- To upload new documents, click the Upload icon.
- Click the existing file icon to use the document that has previously been uploaded and saved

a) Click **Upload Files**. Select the appropriate document file to upload. (Alternatively, you can drag and drop the appropriate document file). Click **Done**.



- b) The following screen shows up when you click the existing file icon to upload: Use the suitable document file to upload. Click **Yes**.

Choose

File Name	File Type	Action
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use

Mailing Address

Review may result in delay or rejection of your application.

Choose

File NameFile TypeAction

Do you want to upload the document?

Yes

Electronic Leave Request Form (Blank)	PDF	Use
Electronic Leave Request Form (Blank)	PDF	Use

10) In the *Attestation* step, click the attestation check box and fill in the mandatory field. Click **Save & Next**

The screenshot shows the 'Attestation' step of the application process. On the left, a vertical list of steps includes 'Getting Started', 'Requirements for Licensure', 'Personal Information', 'Mailing Address', 'Additional Application Requirements', 'Professional Work Experience', 'Education Information', 'Upload Document(s)', 'Attestation' (highlighted with an orange dot), and 'Payment'. The main content area is titled 'Attestation' and contains a checkbox with a red asterisk, which is checked. Below the checkbox is a text area for the attestation signature, with 'Jamie' entered. To the right of the signature field is a date field labeled 'Attestation Date' with '12-27-2021' entered. At the bottom right, there are two buttons: 'Previous' and 'Save & Next' (highlighted with a red border).

11) Under the *Payment* step, select the desired mode of payment and click **Pay and Submit**.

The screenshot shows the 'Payment' step of the application process. On the left, a vertical list of steps includes 'Getting Started', 'Requirements for Licensure', 'Personal Information', 'Mailing Address', 'Additional Application Requirements', 'Professional Work Experience', 'Education Information', 'Upload Document(s)', 'Attestation', and 'Payment' (highlighted with an orange dot). The main content area is titled 'Payment' and contains a text box with instructions: 'Select your method of payment and click "Pay and Submit" to input your payment information.' Below this, there are two paragraphs of text: 'Payments made with a Visa or Mastercard will be charged a 2.5% transaction fee. This is a fee imposed directly by the bank, and no portion of the fee is paid to or collected by the Regulation and Licensing Department.' and 'Payments made by E-Check will not result in any transaction fee.' Below the text is a dropdown menu labeled '\* Mode of Payment' with 'Credit Card (Visa or Mastercard)' selected. Below the dropdown, it says 'The amount to be paid is \$' followed by a blacked-out amount. Below that, it says 'Please click the Pay & Submit button to proceed with the payment.' At the bottom right, there are two buttons: 'Previous' and 'Pay and Submit' (highlighted with a red border).

### Notes:

- If you select **Credit Card** or **E-check**, a pop-up window for payment gateway, Cybersource, will be displayed.
- Payment is a separate system; credit card info will not be stored/saved by RLD.
- Cybersource is a SoNM billing platform, and this is not phishing or other malware.

### PAYMENT GATEWAY

- 1) Enter the billing information and click **Next**.

The screenshot shows the Cybersource payment gateway interface. At the top, the Cybersource logo is displayed. Below it, there are four tabs: Billing, Payment, Review, and Receipt. The 'Billing' tab is currently selected and highlighted in green. The main form area is divided into two sections: 'Billing Information' and 'Your Order'.

**Billing Information:**

- First Name:** Jamie
- Last Name:** Montoya
- Company Name:** Jamie Montoya
- Address Line 1:** 2550 Cerrillos rd
- City:** Santa Fe
- Country/Region:** United States of America
- State/Province:** New Mexico
- Zip/Postal Code:** 87506
- Phone Number:** (empty field)
- Email:** bwbt024@gmail.com

A red box highlights the **Next** button at the bottom right of the Billing Information section. A [Cancel Order](#) link is located at the bottom left of the form.

**Your Order:**

- Total amount:** \$ [REDACTED]

2) Enter Payment details and click **Next**

**cybersource**  
A Visa Solution

Billing Payment Review Receipt

**Payment Details**

\* Required field

Card Type \*  
☒ VISA Visa  
☐ Mastercard Mastercard

Card Number \*  
 xxxxxxxxxxxx1111

Expiration Month \*  
 03

Expiration Year \*  
 2023

CVN \*  
 This code is a three or four digit number printed on the back or front of credit cards.  
 \*\*\*

Back Next

[Cancel Order](#)

**Your Order**

Total amount \$

3) Review the order and click **Pay**.

**cybersource**  
A Visa Solution

Billing Payment Review Receipt

**Review your Order**

**Billing Address**

Jamie Montoya  
 Jamie Montoya  
 2550 Cerrillos rd  
 Santa Fe  
 New Mexico  
 87506  
 United States of America

**Payment Details**

Card Type Visa

Card Number xxxxxxxxxxxx1111

Expiration Date 03-2023

Back Pay

[Cancel Order](#)

**Your Order**

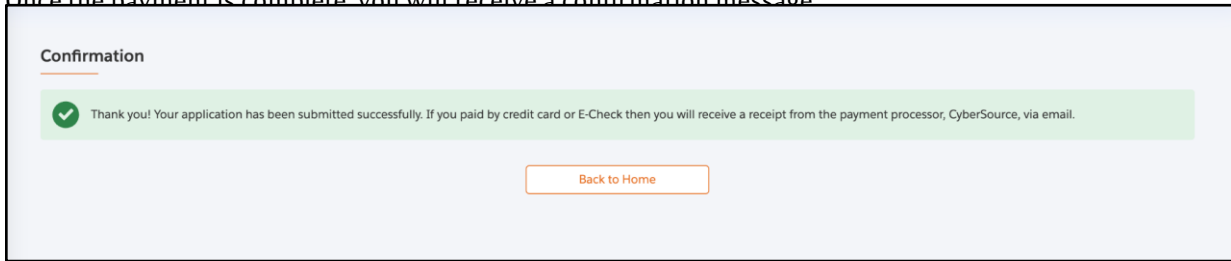
Subtotal \$

Service fee \$

Total amount \$

By clicking Pay, I agree to the [Service Fee Terms & Conditions](#)

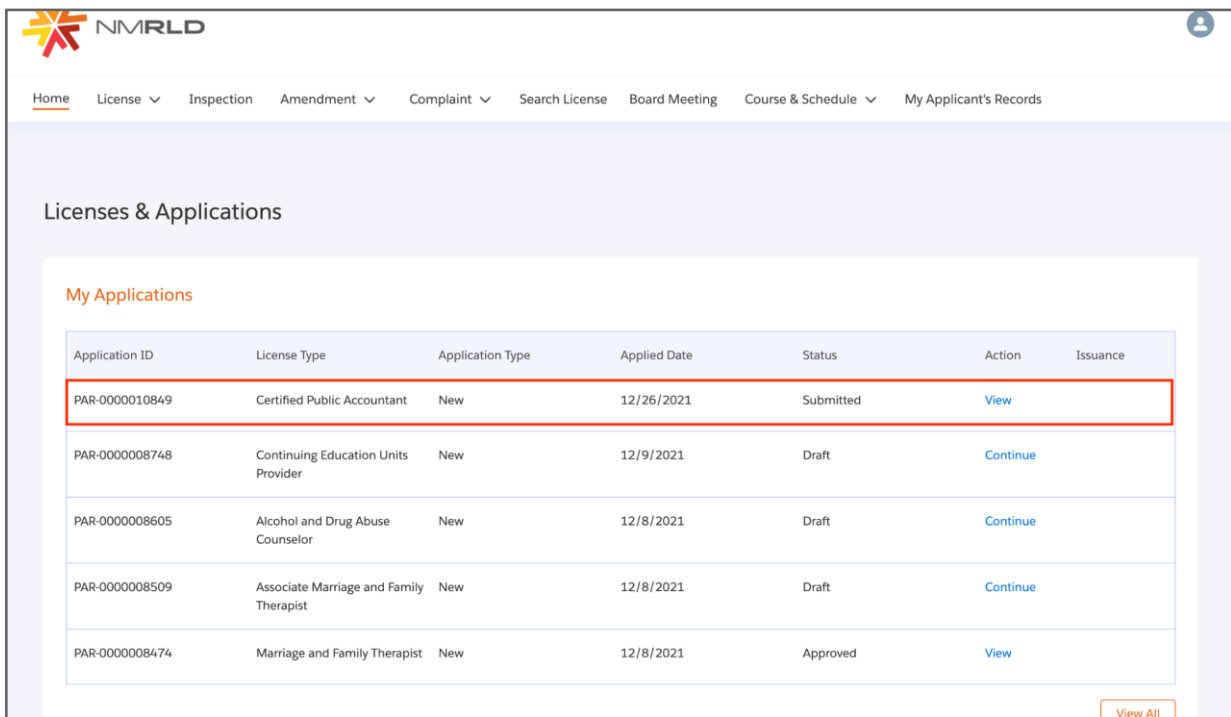
### 4) Once the payment is complete, you will receive a confirmation message.



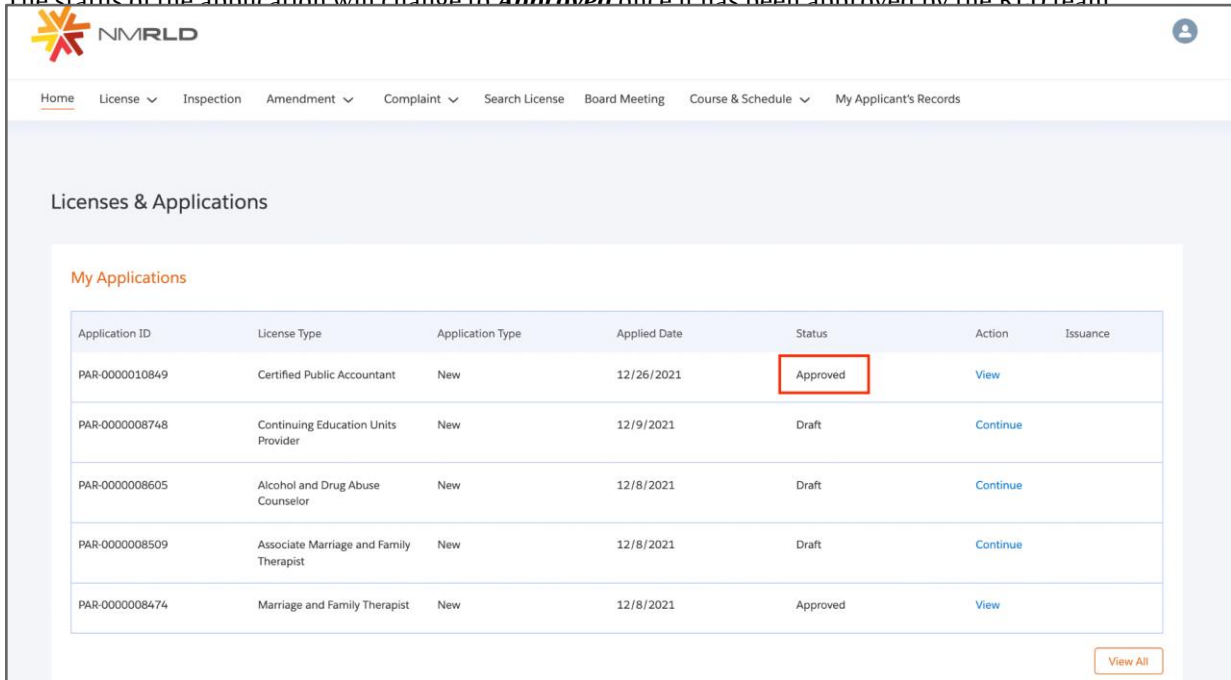
**Note:** A payment receipt will be delivered to the email entered in the Payment Gateway.

## CHECKING APPLICATION SUBMISSIONS

### 1) The application will display under My Applications with a submitted status on the Home Page.



- 2) The status of the application will change to **Approved** once it has been approved by the RLD team



**My Applications**

Application ID	License Type	Application Type	Applied Date	Status	Action	Issuance
PAR-0000010849	Certified Public Accountant	New	12/26/2021	Approved	<a href="#">View</a>	
PAR-0000008748	Continuing Education Units Provider	New	12/9/2021	Draft	<a href="#">Continue</a>	
PAR-0000008605	Alcohol and Drug Abuse Counselor	New	12/8/2021	Draft	<a href="#">Continue</a>	
PAR-0000008509	Associate Marriage and Family Therapist	New	12/8/2021	Draft	<a href="#">Continue</a>	
PAR-0000008474	Marriage and Family Therapist	New	12/8/2021	Approved	<a href="#">View</a>	

[View All](#)

- a) Once the RLD team approves your license, you can also print a copy of the license from the **My Licenses** section



**My Licenses (3)**

License Number	License Type	Issued Date	Expiration Date	Status	Print	Renew	Request Inspection
ACC-2021-0435	Certified Public Accountant	12/27/2021	12/31/2022	Active	<a href="#">Print</a>		
CTB-2021-0260	Marriage and Family Therapist	12/8/2021	9/30/2023	Active	<a href="#">Print</a>		
SWB-2021-0091	Licensed Clinical Social Worker (LCSW)	12/7/2021	7/1/2023	Active	<a href="#">Print</a>		

[View All](#)