



Renewals Quick Reference Guide
Public Accountancy Board

Table of Contents

Overview	3
Accessing a License for Renewal	3
Renewal Steps	5
Payment Gateway	14
Checking Renewals Submissions	16

OVERVIEW

For the New Mexico Regulation and Licensing Department, this Renewals Quick Reference Guide will explain how to use the portal to renew a license.

ACCESSING A LICENSE FOR RENEWAL

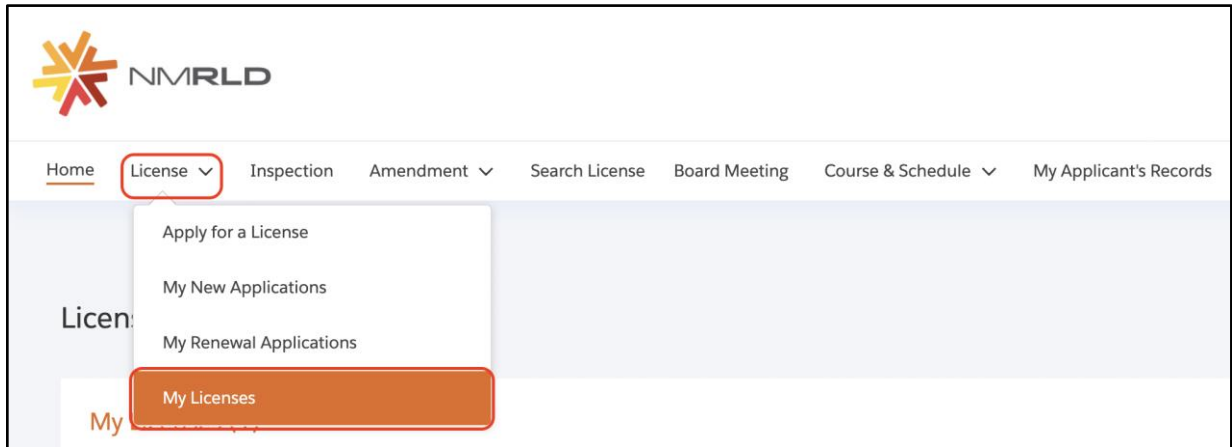
1. Log in to the RLD Licensing portal.
2. On the home page, you will see the **My Licenses** section. This will display a list of all your applied licenses.

The screenshot displays the NMRLD portal interface. At the top, the NMRLD logo is on the left, and a user profile icon is on the right. Below the logo is a navigation bar with links: Home, License (with a dropdown arrow), Inspection, Amendment (with a dropdown arrow), Search License, Board Meeting, Course & Schedule (with a dropdown arrow), and My Applicant's Records. The main content area is titled 'Licenses & Applications'. Within this area, a section titled 'My Licenses (1)' is highlighted with a red border. This section contains a table with the following data:

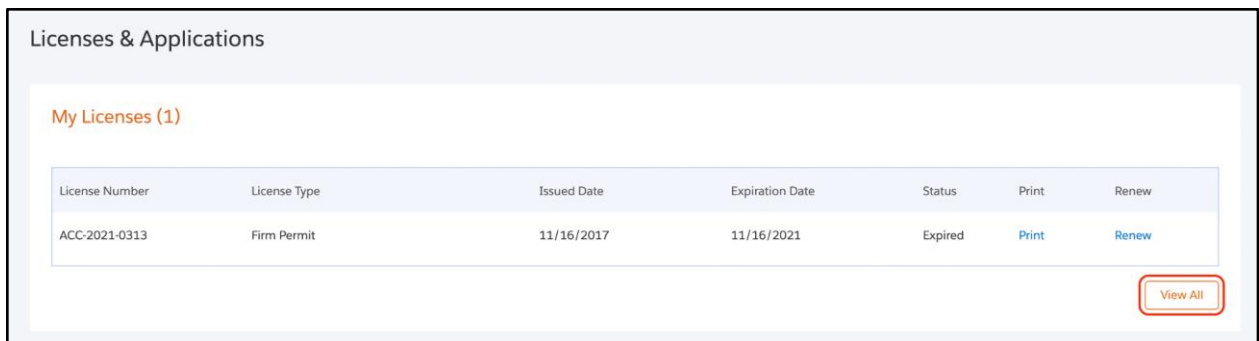
License Number	License Type	Issued Date	Expiration Date	Status	Print	Renew
ACC-2021-0313	Firm Permit	11/16/2017	11/16/2021	Expired	Print	Renew

Below the table is a 'View All' button. At the bottom of the page, there are two sections: 'Boards and Commissions Division' and 'Cannabis Control Division'. Each section has an 'Apply for a License' button.

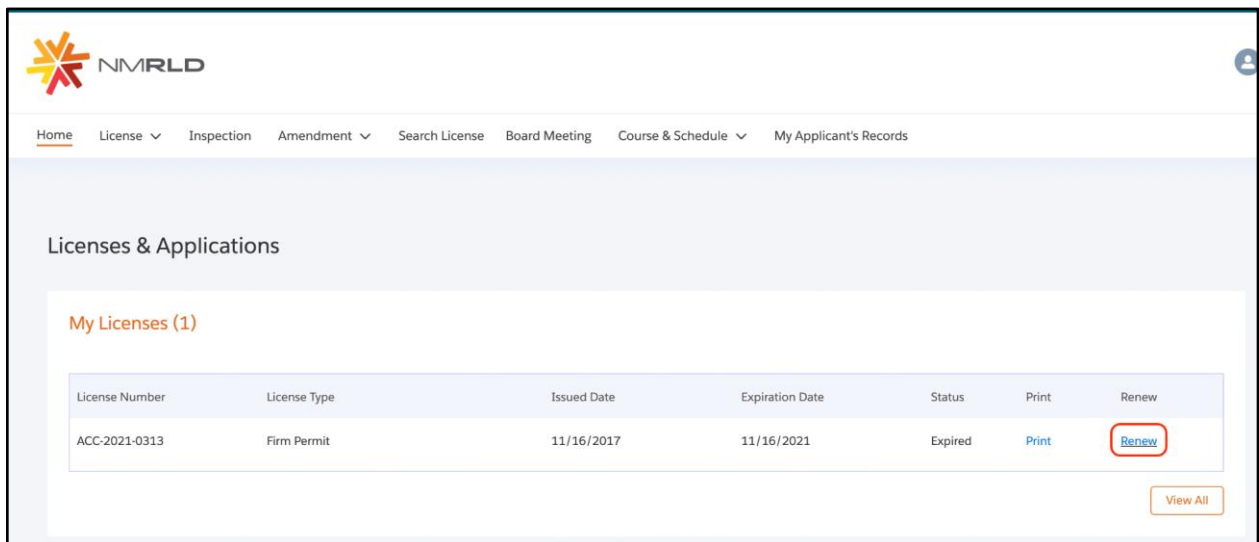
Note: If you see the *My Licenses* section on your home page, you can access it through the **License > My Licenses** drop-down list.



3. Click **View All** to see the complete list.



4. For the license you want to renew, click the **Renew** link under the Renew column in blue. The renewal application will appear.



RENEWAL STEPS

You must fill in the details for all steps before submitting your renewal application.

5. In the **Getting Started** step, read the information carefully, then click **Save & Next**.

The screenshot shows the 'Getting Started' step of the renewal process. On the left is a vertical progress bar with steps: Getting Started (active), Personal Information, Mailing Address, Questionnaire, Upload Document(s), Attestation, and Payment. The main content area is titled 'Getting Started' and contains introductory text about the renewal process, a link to the RLD website for further questions, and a 'Save & Next' button at the bottom right.

6. In the **Personal Information** step, your information will be pre-populated. However, if you need to edit the details, click on **My Profile**. The renewal application will then open the My Profile page.

The screenshot shows the 'Personal Information' step. The progress bar on the left now has 'Personal Information' as the active step. The main content area is titled 'Personal Information' and includes a warning box about verifying information. Below this are input fields for 'Business Name' and 'Doing Business As'. A 'My Profile' button is highlighted with a red box. Below the button, the 'Named Owner Completing Application' section shows pre-populated fields: First Name (Mythri), Middle Name (empty), Last Name (K), Date of Birth (empty), Primary Phone Number (empty), and Cell Phone Number (empty).

- a. Scroll to the bottom of the My Profile page and click **Edit**.
- b. Update the **Email Address** and click **Save**.
You will receive an email requesting confirmation about changing the email address. Once you confirm, the RLD application will update your email address.

Note: You cannot update any other information in your profile except the email address. And you can only update your email address once.

My Profile

Personal Info

Pronoun

* First Name

Mythri

Middle Name

* Last Name

K

Suffix

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

mythri.kukkala@mtxb2b.com

* Date of Birth

11/08/1995

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

9 Enmedio Pl

Mailing Address Line 2

* Mailing City

Santa Fe

* Mailing State

New Mexico

* Mailing Zip Code

87508

* Mailing Country

United States

* Primary Phone Number

(505) 474-6587

Cell Phone Number

Business Phone Number

- c. When complete, click the back arrow of your browser to return to the renewal form.



Note: The renewal form will open from the Getting Started step. You must click **Save & Next** to navigate to the Mailing Address step.

7. In the **Mailing Address** step, update the address details, if required, and click **Save & Next**.

Mailing Address

Please carefully review and verify that all address information below is current and correct. Any official legal communication will be mailed to your address on file. Any changes made on this page to your address information will be updated and saved in your user profile.

Mailing Address Line 1: 9 Enmedio Pl

Mailing Address Line 2:

* Mailing City: Santa Fe

* Mailing County:

Mailing State: New Mexico

* Mailing Zip: 87508

* Mailing Country: United States

Any business address listed below is maintained as an address of record. Mailing addresses may be edited and updated through your personal profile in this portal, but changes to your business address must be made through a separate application form filed as an amendment, which is accessible by going to the Amendments Tab.

Business Street 1:

Business Street 2:

Business City:

Business State:

Business Zip:

Business Country:

Previous Save & Next

Note: If you want to update your business address, you must raise an amendment request. To raise an amendment, click the **Amendments** menu and click **License Address Change**.

Home License Inspection **Amendment** Search License Board Meeting Course & Schedule My Applicant's Records

Public Accountancy Board: F
PAR-0000007213

Getting Started

Personal Information

Mailing Address

Questionnaire

License Address Change

License Trade Name Change

Transfer Of License

Individual Legal Name Change

Individual Email Change

My Change Requests

Mailing Address Line 1

Mailing Address Line 2

8. Once complete, click **Save & Next**.

9. In the **Questionnaire** step, you must answer **Yes** or **No**, and provide additional details, if required.

- a. Select **Yes** or **No** for the question “Has your registration type changed since your last renewal?”
 - i. If you select **Yes**, then you will be prompted to select an option for the **Type of Firm Business Registration** drop-down list.

Questionnaire

All questions below must be answered in order to complete your renewal.

* Has your registration type changed since your last renewal?

☒ Yes ☐ No

* Type of firm business registration

Partnership

If you answered YES, please include an updated copy of your proof of Organization/Incorporation that is registered with the Secretary of State including business ID number (Document Upload required) and (if a DBA) your New Mexico business tax DBA registration form indicating both the organization's name and the DBA with the NM Tax and Revenue Department (Document Upload optional) if applicable.

- b. Select **Yes** or **No** for the question “Has the firm’s ownership changed since your last renewal?”
 - i. If you answer **Yes**, you must upload a document with details about ownership changes.

Ownership Profile

* Has the firm’s ownership changed since your last renewal?

☒ Yes ☐ No

If you answered YES, please include the ownership changes on a separate sheet of paper (Document Upload required).

- c. Select **Yes** or **No** for the question “Is your firm EXEMPT from a peer review? (see below requirement under Peer Review Statement)”.
 - i. If you have selected **Yes**, enter the list of services your firm provides in the “If you answered YES to the above question, list the services your firm provides below:” field.

* Is your firm EXEMPT from a peer review? (see below requirement under Peer Review Statement)

☒ Yes ☐ No

* If you answered YES to the above question, list the services your firm provides below:

Accounts

Peer Review Statement

Unless EXEMPT, a firm seeking registration to engage in the practice of public accountancy must undergo a peer review at least once every three years. Participation is required of each firm that performs auditing engagements, including but not limited to audits, reviews, financial statements, compilations, attestation, forecasts, or projections [16.60.4 NMAC]. Firms that perform audits under the Statements on Auditing Standards (SASs), audits under Government Auditing Standards (GAS), and/or examinations under the Statements on Standards for Attestation Engagements (SSAEs) are required to have system peer reviews. Firms that only perform services under Statements on Standards for Accounting and Review Service (SSARs) or services under SSAEs not included in system reviews are required to have an engagement review. An EXEMPT firm DOES NOT independently as an exempt firm perform work or sign accounting and/or financial statements on audit engagements, including but not limited to audits, agreed upon procedures, reviews, compilations, attestations, forecasts, or projections.

- ii. If you have selected **No**, then select the date for the “The firm’s peer review due date” field.

* Is your firm EXEMPT from a peer review? (see below requirement under Peer Review Statement)

☐ Yes ☒ No

Peer Review Statement

Unless EXEMPT, a firm seeking registration to engage in the practice of public accountancy must undergo a peer review at least once every three years. Participation is required of each firm that performs auditing engagements, including but not limited to audits, reviews, financial statements, compilations, attestation, forecasts, or projections [16.60.4 NMAC]. Firms that perform audits under the Statements on Auditing Standards (SASs), audits under Government Auditing Standards (GAS), and/or examinations under the Statements on Standards for Attestation Engagements (SSAEs) are required to have system peer reviews. Firms that only perform services under Statements on Standards for Accounting and Review Service (SSARs) or services under SSAEs not included in system reviews are required to have an engagement review. An EXEMPT firm DOES NOT independently as an exempt firm perform work or sign accounting and/or financial statements on audit engagements, including but not limited to audits, agreed upon procedures, reviews, compilations, attestations, forecasts, or projections.

The firm is subject to peer review requirements as per Board rules. The following documents are included with this application: Acceptance / Enrollment Letter (if applicable);

The firm's peer review due date

11-25-2021

- iii. If you have selected **Yes** for the question “Have you applied and been granted a peer review extension?”, select the **Extention Date**.

* Have you applied and been granted a peer review extension?

☒ Yes ☐ No

Extension Date

11-16-2022

- d. For the **Compliance Certification** questions, read each question carefully and answer **Yes**, **No**, or **N/A**, as applicable.

Note: If you have answered **No** to any question in the Compliance Certification section, your renewal application will be kept on hold.

Compliance Certification

* Regardless if your firm is in non-exempt or exempt status for a peer review, will the firm comply with Section 61-28B-13 of the New Mexico Public Accountancy Act, "Firm permits to practice, attest experience, peer review"?

☒ Yes ☐ No

* Does the individual responsible for the proper registration of the firm possess a valid CPA license? (This individual is responsible for supervising attestation services, signs or authorizes someone to sign the accountant's report on audits and financial statements on behalf of the firm and must meet the experience requirements set forth in the professional standards for such services).

☒ Yes ☐ No

* If a commercial mail service or a post office box number is registered as the address of the firm, the Board requires additional information to establish the physical location of the firm. Is this a Branch Office?

☒ Yes ☐ No

* Does the firm understand its option under Firm Mobility? (out of state)

☒ Yes ☐ No ☐ N/A

e. Fill in the details for **Other Office Locations**, if available.

For more information regarding firm mobility please visit our website at: <https://www.rld.nm.gov/boards-and-commissions/individual-boards-and-commissions/accountancy> under Forms and Applications.

Other Office Location(s) ⓘ

N/A



Previous

Save & Next









10. Once done, click **Save & Next**.

11. In the **Upload Document(s)** step, click the **Upload a New File** icon to upload new documents or click the **Select Existing File** icon to select already uploaded documents. The document names with a red asterisk (*) are mandatory.

Upload Document(s)

Below is a list of documents that you may be required to upload to the portal in order to complete your renewal. Documents listed with an asterisk (*) are mandatory and must be provided.

Please carefully review and confirm that the documents you upload are the correct file and that each is complete and legible. Documents that cannot be viewed may result in delay or rejection of your renewal.

Document Name	Description	Upload a New File	Select Existing File	Uploaded Files	Delete
* Contact Information for the Firm's principal(s)/ Ownership Profile Change	Include the licensing information and attest experience of all Shareholder(s), Stockholder(s), Proprietor(s), Partner(s) and any other employees holding a New Mexico CPA license.				
* Business Registration/ Secretary of State Documents	Submit a copy of your Articles of Organization/Incorporation that is registered with the Secretary of State including business ID number. Not applicable for Sole Proprietorship.				
Peer Review Completion Letter	Letter of Completion provided after all deficiencies have been satisfied.				
Corrective Action Documentation	Applicable for a firm that has received a deficient peer review report				

- a. If you click on **Upload Files**, the following screen will appear.

Upload

Please attach a copy of the required document.

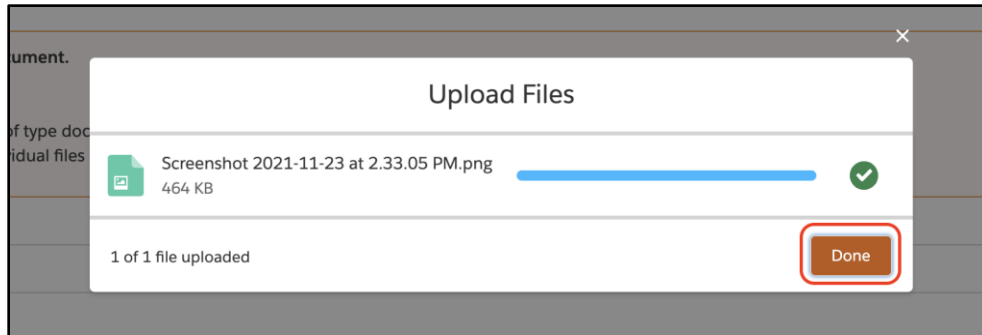
Note that:

1. File size should not exceed 25MB.
2. File extensions will be accepted only of type doc, docx, pdf, png, tiff, jpg, jpeg, txt, csv.
3. Documents may be uploaded as individual files or as a single merged file on the next page.

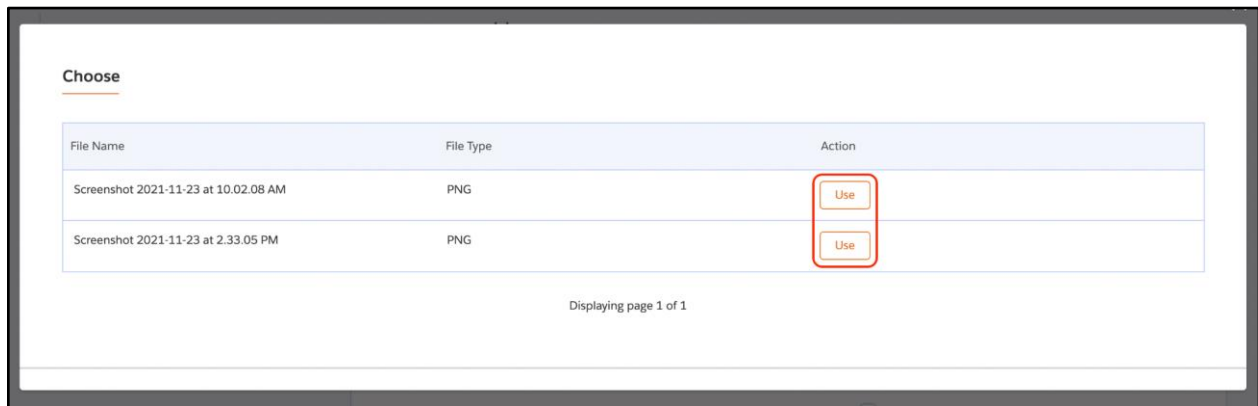
 Upload Files
 Or drop files

Close

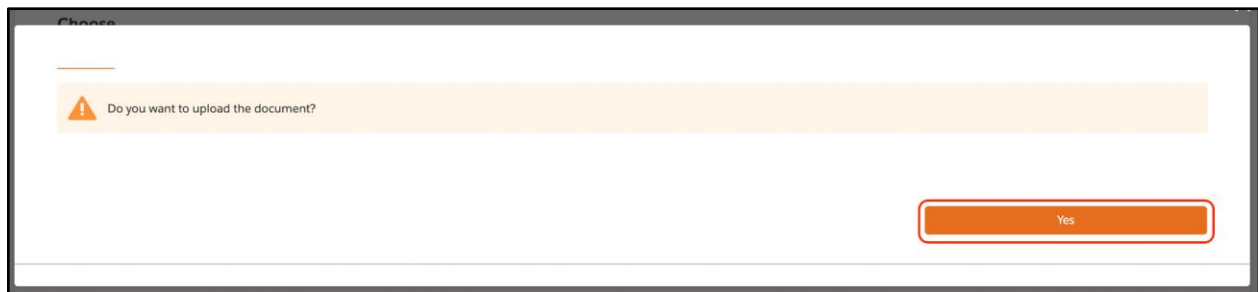
- b. Click **Upload Files**, select the file, then click **Done** and click **Close**.



- c. If you click on **Select Existing**, the following screen will appear. Click **Use** to select the required file.



- d. Click **Yes**.



12. Once all documents are uploaded, click **Save & Next**.

13. Select the **Attestation** checkbox to give your consent, enter your name in the **Attestation Signature** field, and click **Save & Next**.

Home License Inspection Amendment Search License Board Meeting Course & Schedule My Applicant's Records

Public Accountancy Board: Firm Permit
PAR-000007213

Getting Started
Personal Information
Mailing Address
Questionnaire
Upload Document(s)
Attestation
Payment

Attestation

☒ I hereby depose and state under penalty of perjury, I am the person described and identified in this application, the information given by me is true, correct, and complete to the best of my knowledge and belief. I understand that any information contained in this application may be investigated and any false or dishonest answer to any question in this application may be grounds for denial or revocation of my license. I agree that I meet all requirements for this license.

* Attestation Signature (Please type your full name to sign)
Allen D

Attestation Date
11-23-2021

Previous Save & Next

14. Read the information in orange and then select a payment mode from the **Mode of Payment** drop-down.

Payment

Select your method of payment and click "Pay and Submit" to input your payment information.

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.

Payments made by E-Check will not result in any transaction fee.

* Mode of Payment

-- Clear --
Credit Card (Visa or Mastercard)
E-Check

15. Click **Pay and Submit**.

Note: You will be redirected to the following Payment Gateway screen. Payment is a separate system and your credit card info is not stored or saved by RLD. Cybersource is a SoNM billing platform, and this is not phishing or other malware.

PAYMENT GATEWAY

1. Verify your billing information and click **Next**.

The screenshot shows the 'Billing Information' form in the payment gateway. The form is divided into two sections: 'Billing Information' and 'Your Order'. The 'Billing Information' section contains the following fields:

- First Name * (Required field): Mythri
- Last Name * : K
- Company Name : Mythri K
- Address Line 1 * : 9 Enmedio Pl
- City * : Santa Fe
- Country/Region * : United States of America (dropdown)
- State/Province * : New Mexico (dropdown)
- Zip/Postal Code * : 87508
- Phone Number * : (empty)
- Email * : mythri.kukkala@mtxb2b.com

The 'Your Order' section shows the total amount: \$175.00. At the bottom of the 'Billing Information' section, there is a 'Next' button and a 'Cancel Order' link.

2. Enter the payment details and click **Next**.

The screenshot shows the 'Payment Details' form in the payment gateway. The form is divided into two sections: 'Payment Details' and 'Your Order'. The 'Payment Details' section contains the following fields:

- Card Type * (Required field): ☒ VISA Visa, ☐ Mastercard Mastercard
- Card Number * :1111
- Expiration Month * : 04 (dropdown)
- Expiration Year * : 2027 (dropdown)
- CVN * : ... (with a CVN icon)

The 'Your Order' section shows the total amount: \$175.00. At the bottom of the 'Payment Details' section, there is a 'Back' button, a 'Next' button, and a 'Cancel Order' link.

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

Billing
Payment
Review
Receipt

Review your Order

Billing Address

Mythri K
Mythri K
9 Enmedio Pl
Santa Fe
New Mexico
87508
United States of America

Payment Details

Card Type	Visa
Card Number	xxxxxxxxxxxx1111
Expiration Date	04-2027

Your Order

Subtotal	\$175.00
Service fee	\$4.38
Total amount	\$179.38

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


[Back](#)
[Pay](#)

[Cancel Order](#)

- A confirmation message will appear once the payment is complete.

Home
License
Inspection
Amendment
Search License
Board Meeting
Course & Schedule
My Applicant's Records

Confirmation


Thank you! Your application has been submitted successfully. You may check the status of your application by logging into your Portal at any time. Department staff will contact you if additional information or documentation is needed to complete the review of your application. Once your application is approved, you will receive an email notifying you of the update and how you can access your records and a digital copy of your license on the Portal. If you paid by credit card or E-Check then you will receive a receipt from the payment processor, CyberSource, via email.

[Back to Home](#)

Note: You will receive a payment receipt to the email address you have entered in the Payment Gateway.

CHECKING RENEWALS SUBMISSIONS

1. On the home page, the renewal submission will appear under **My Renewals** with submitted status.

My Renewals

Application ID	License Type	Application Type	Applied Date	Status	Action
PAR-000007223	Firm Permit	Renewal	11/23/2021	Submitted	View
PAR-000007213	Firm Permit	Renewal	11/22/2021	Submitted	View

[View All](#)

Note: The renewal application status changes to Active once the RLD team approves.

2. Click on the **Print** button to generate a digital certificate (PDF) under **My Licenses**.

My Licenses (2)

License Number	License Type	Issued Date	Expiration Date	Status	Print	Renew
ACC-2021-0315	Firm Permit	11/1/2021	11/23/2021	Active	Print	Renew
ACC-2021-0313	Firm Permit	11/16/2017	11/16/2021	Expired	Print	Renew

[View All](#)