AGENDA
UTAH BOARD OF ACCOUNTANCY
LICENSING BOARD
March 4, 2020 – 1:30 P.M.
Room 402
Heber M. Wells Building
160 E. 300 S. Salt Lake City, Utah

This agenda is subject to change up to 24 hours prior to the meeting.

ADMINISTRATIVE BUSINESS:
Call meeting to order
Sign per diem
Elect a new chair person
Approve board minutes from November 13, 2019 meeting
Compliance report, Lisa Lynn

DISCUSSION ITEMS:
1. S. Jeffrey Jones, CPA - SEC Sanction
2. CPA Law & Rule Exam update - Jenna Mayne
3. Ineligible for testing - MAcc students
4. CPA evolution webinars
5. CPE online - use of actors
6. Q4 Results/Elijah Watts Sells Award 2019 UT
7. Practice Analysis - AICPA
8. Legislative update

NEXT SCHEDULED MEETING: May 6, 2020

At the discretion of the board, the meeting may be closed to discuss the character and competency of an individual pursuant to 52-4-205(1)(a).

Note: In compliance with the Americans with Disabilities Act, individuals needing special accommodations (including auxiliary communicative aids and services) during this meeting should notify, Carol Inglesby, ADA Coordinator, at least three working days prior to the meeting. Division of Occupational & Professional Licensing, 160 East 300 South, Salt Lake City, Utah 84115, 801-530-6628 or toll-free in Utah only 866-275-3675.
CONVENED: 1:30 p.m.  
ADJOURNED: 2:21 p.m.

Bureau Manager: Robyn Barkdull
Board Secretary: Sharon Smalley

Board Members Present:
- Wade Watkins
- Mike Gregory
- Carey Woolsey
- Robert Anderson

Board Members Absent: David Young (excused)

DOPL Staff
- Robyn Barkdull, Bureau Manager
- Sharon Smalley, Board Secretary
- Neena Bowen, Compliance Specialist
- Lisa Lynn, Compliance Specialist
- Pam Bennett, Investigations

Guests:
- Stacy Weight, UACPA
- Monica Gardner, UACPA

ADMINISTRATIVE BUSINESS:

Approval of Minutes

A motion was made by Carey Woolsey to approve the minutes from the October 9, 2019, meeting as written. The motion was seconded by Michael Gregory and passed unanimously.

Compliance Report

Ms. Bowen gave the compliance report. All licensees are compliant with the terms of their probation. She reported that there is one new probationer who has not met with the compliance officer as of yet. Questions were asked and
answered. Lisa Lynn was introduced as the new compliance specialist for the accounting profession.

**CPA EXAM CREDIT EXTENSION REQUEST (XIAOYAN ZHANG)**

Ms. Barkdull gave the background for the request by Ms. Zhang. A motion was made by Carey Woolsey to grant a six month extension and then have her come back to the Board if additional time is needed. The motion was seconded by Mike Gregory and passed unanimously.

**NASBA ANNUAL MEETING – SUMMARY**

Ms. Barkdull gave a report on the Mountain Region meeting with NASBA in Boston. There will be another meeting of the six states that use the Nevada Peer Review in May to discuss the next steps in having a regional Peer Review Oversight Committee.

The IRS is asking all states for a list of all licensed CPA that have had disciplinary action. They were directed to each states’ website.

**LEGISLATION UPDATE – 2020 SESSION**

Ms. Barkdull reported that there are two issues that will come before the next legislative session. The DOPL bill is asking for the CPA profession to be given citation authority for unprofessional conduct. The other issue is to delete the requirement that a CPA be appointed as a member of the Construction Services Commission. This language is outdated and membership was removed many years ago.

**EDUCATION REQUIREMENTS – CLARIFICATION REGARDING GRADUATE LEVEL HOURS**

The new rule went into effect on November 7th. The new rule defines what the 120 hour education requirement must include for a candidate to sit for the exam at 120 hours.

**120 HOUR TESTING – NASBA PROCEDURE/FEES**

Now that a candidate’s evaluation to sit for the exam can be with 120 hours, the remaining 30 hours for licensure may still need to be evaluated by NASBA. They charge $65 for an educational evaluation. First time candidates pay $145 for the evaluation. If a person tests at 120 hours, they will not get their congratulatory letter until NASBA receives transcripts showing the masters or the 150 hours.

The meeting adjourned at 2:21.

*Note: These minutes are not intended to be a verbatim transcript but are intended to record the significant features of the business conducted in this meeting. Discussed items are not necessarily shown in the chronological order they occurred.*