



User Manual for “Firms: Form 117 (New Firm Name)”

This User Manual IS intended for already registered members who would like to apply for New Firm Name.

Please go the website ICAI.org. Once there, please click on the Service Portal Link on the top right corner of the screen.

The screenshot shows the ICAI website homepage. The header includes the ICAI logo, name, and tagline. A search bar and 'Self Service Portal (SSP)' link are visible. The main content area features a banner for 'ICAI TV' and 'GPE EVENTS' with 'WEBCASTS AND WEBINARS'. Below this is a section titled 'What would you like to do?' with links to view events, sign up, and report on events. The right sidebar contains links for Students, Members, Employers, Resources, and Events. The footer includes a 'What's New' section with recent updates, a 'President's Message' from July 2019, and a 'Most Important' section with key initiatives.

The following Login Page will open <https://eservices.icai.org/>

The screenshot shows the ICAI login page. The header includes the ICAI logo, name, and tagline. The main content area features a large image of hands typing on a laptop. To the right is a 'SIGN IN' form with fields for 'UserId' (containing '<MRN/SRN>@icai.org') and 'Password' (containing 'Please Enter Password'). Below the form are links for 'Forgot Password?' and a 'LOGIN' button. At the bottom, there are links for 'Student Enrolling for CA Course' and 'If you don't have ICAI login'.



The Institute of Chartered Accountants of India

(Setup by an Act of Parliament)

ICAI Bhawan, Indraprastha Marg, New Delhi - 110002

The Member applicant after successful login into the portal with their user id and password, below screen appears, click here to access Member SSP Portal as Highlighted below

cdn3.digialm.com/SelfServices/home?urn=38602387

ION | Self Service Privacy Notice Consent Dashboard (GMT+05:30)

ICAI Member Landing Page

The Institute of Chartered Accountants of India

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Members

Self Service Portal (SSP)

Digital Learning Portal

Click [here](#) to access the Member SSP Portal

- Digital Learning Platform - Dedicated and Enhance Professional Learning Experience - [Click Here](#) New!

Following Screen will appear, Click on My Firms as Highlighted below

Self Services Portal

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&checksum=...

Welcome JYOTI
Member (MRN : 554519)

Home Contact Us Logout

The Institute of Chartered Accountants of India

(Setup by an Act of Parliament)

Membership Status : **Active**

Membership Type : **ACP**

COP Status : **Active (Full Time)**

Last Membership Fees Paid : **2019-20**

Region : **North**

This Portal facilitates the members, firms and Student activities of ICAI.

My Trainees

My Membership

My Firm



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Following Screen will appear, Click on Firm New Application Tab as Highlighted below

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&checksum=...

Welcome JYOTI
Member (MRN : 554519)

Home Contact Us

Firm Module

- Firm Card / Certificate
- Firm Document Download
- Firm New Application**
- Submitted Applications

Institute of Chartered Accountants of India
by an Act of Parliament)

Membership Status : Active
Membership Type : ACP
COP Status : Active (Full Time)
Last Membership Fees Paid : 2019-20
Region : North

Note : Please click on side menu bar to access various forms

Membership Id	First Name	Gender
554519	Jyoti	FEMALE

Following Screen will appear, Click on Firm Name Approval (Form 117) Tab as Highlighted below

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&checksum=... Paused

Welcome JYOTI
Member (MRN : 554519)

Home Contact Us Logout

Firm Module

- Firm Card / Certificate
- Firm Document Download
- Firm New Application
- Submitted Applications

Firm Name Approval (Form 117)

Firm Constitution (Form 18)

Change Request Form

Merger Form (Form E)

Firm Closure Form

GoodWill Form

Demerger Form (Form F)



Following Screen will appear, Select option as highlighted below for Request for New Firm Name

← → ↺ ⌂ ⓘ cdn3.digitalm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573

Form 117

The Institute of Chartered Accountants of India
(Setup by an Act of Parliament)

Instructions

Firm Details

Firm Details

*Firm Name Request For?
☒ Request For New Firm Name ☐ Request For Conversion To LLP

System will display the Type of Firm (CA, LLP or MCS), Select Firm Name as highlighted below

Form 117

Firm Details

Firm Details

*Firm Name Request For?
☒ Request For New Firm Name ☐ Request For Conversion To LLP

*Type Of Firm
---Select---

CA
LLP
MCS

System will display the Firm Association Type (Proprietor or Partner), Select the option as Highlighted below

Form 117

Firm Details

Firm Details

*Firm Name Request For?
☒ Request For New Firm Name ☐ Request For Conversion To LLP

*Type Of Firm
CA

*Firm Association Type
Proprietor

Proprietor
Partner

Member/Partner Details ⓘ



System will display the Member/Partner Details.

For Proprietor, Member details will be displayed and validated automatically. In this Case Only 1 Member is Proprietor so by default user is selected as head Incharge.

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&checksum=... Paused

Form 117

Firm Details

***Firm Name Request For?**
☒ Request For New Firm Name ☐ Request For Conversion To LLP

***Type Of Firm**
CA

***Firm Association Type**
Proprietor

Member/Partner Details

Sr No.	Membership Number	Member Name	Membership Status	COP Status	Is Head Incharge
1	554519	JYOTI	Active	Active	☒

Validate Members

For CA type of firm is selected and Firm association type is Partner and after selecting no. of partners. In member Partner Details section the row will be auto populated depending on the total no. of partners and then the User will enter the partner's Membership no. and press the validate members radio button , it will auto populate the member details and below screen will appear. Member need to select the Head Incharge as highlited.

Form 117

Firm Details

***Firm Name Request For?**
☒ Request For New Firm Name ☐ Request For Conversion To LLP

***Type Of Firm**
CA

***Firm Association Type**
Partner

***Total Number Of Members**
2

Member/Partner Details

Sr No.	Membership Number	Member Name	Membership Status	COP Status	Is Head Incharge
1	554519	JYOTI	Active	Active	☒
2	405060	MITTAL KAVITA	Active	Active	☐

Validate Members



After validating member radio button and marking Head In-charge for the firms , User have to enter the Firm Name preference (As per 190 of the Chartered Accountants Regulations) in Firms Name Details. ICAI will consider the preferene in sequence while considering the Firm name approval.

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&check... Paused

Member/Partner Details

Sr No.	Membership Number	Member Name	Membership Status	COP Status	Is Head Incharge
1	554519	JYOTI	Active	Active	☒

Validate Members

Firm Name Details

Firm Name Preference	Firm Name	Firm Name Suffix
Preference 1	JYOTI KOCHAR	& CO
Preference 2		---Select---
Preference 3		---Select---
Preference 4		---Select---

Other Firm Name

☐ Make this Name as 1st priority

Validate Firm Name(s)

User have to click on validate firm name radio button to check the validity of the entered firm names and their availability, system will display the pop-up alert and display the firm name availability as below. Click on Ok.

Alert

Firm Name	Firm Name Status	Reason
JYOTI KOCHAR & CO	Available	This name is available.

OK

Enter the Address of Head Office, In case of Proprietor, System will display the Membership address by default. Click on Generate OTP, verify the Captcha and Submit the Form.

Address of the Head Office

*Is Firm Address Is Same As Membership Address?
☒ Yes ☐ No

*Firm Address Line 1: w/o kapil kochar
Firm Address Line 2: nagpal chowk
Firm Address Line 3: h.no-183 ward-7,bhiwan basti
Firm Address Line 4:

*State: HARYANA
Firm State Code: HR
*City: FATEHABAD
Branch Code: HISAR

*Pin Code: 125050
Country: INDIA

*Firm Email Id: Sanjujyotil@gmail.Com
*Mobile Number: 9812189622
*Phone Number With STD Code: 9255127462

Generate OTP

SUBMIT



In case, Firm Address is different then membership address, System will display the alert

Alert



Firm address should be same as the Membership Address. And if the Firm address is selected different from the membership address then your professional address will also be changed. Firm address should be same as the Membership Address.

OK

Verify the Captcha & OTP as displayed in below screen

Please enter the letters displayed in the image below:
If the image is not clear, click on "Get New Image"



OTP

Resend OTP Validate OTP

In 4m 49s

Version 13.07.01

SUBMIT

Note:

Then in case of partners, Member has to login with their credentials for OTP declaration and then the Head Incharge have to login and in submitted application he has to click on the submitted application and has to click on the same sequence no that he received at the time of submission of request and after clicking on that sequence no the member have to upload the signed copy of Form 117. After completing the activity, the request will move to ICAI member and Student Section.

Once Form is Submitted Following screen will be displayed to user, where Member need to upload the PDF copy of Form 117 Generated from System.

Form 117

Firm Details Branch Office ... Member Partne... Paid Assistant ... Member Declar...

Member Application Status

Form Status	Submitted
OTP Declaration Status	Completed
Form-117 PDF Upload Status	Pending
Application moved to RO	Pending
Approver Action	Pending



After OTP verification (by all partners of Firm), download the Form 117 and Upload as highlighted in below screen.

Form 117

Preference 1 JYOTI KAPIL KOCHAR & CO

Address of the Head Office

Is Firm Address is same as Membership Address
Yes

Firm Address Line 1 w/o kapil kochar	Firm Address Line 2 nagpal chowk	Firm Address Line 3 h.no-183 ward-7, bhawan basti	
Firm Country INDIA	State Code HR	Firm State HARYANA	Firm City FATEHABAD
Pin code 125050	Phone Number with STD Code -9255127462	Firm Email Id sanjuyoti1@gmail.com	Mobile Number 9812189622

Form 117/G Documents

Download Form 117
Download

Upload Form 117 Copy
Click here to upload

Select the Form 177 Downlaoded in user Machine.

Document / Image Upload

MEMBER AGREEMENT COPY

Form117_FNA212183.pdf Drag and Drop File Here/ Browse

File has been successfully uploaded.
Please upload your Member Agreement Copy. Max 2MB

Click Here to Download

Close

Once uploaded, System will display the Confirmation of Upload as below.

Form 117/G Documents

Download Form 117
Download Click here to download Form 117.

Upload Form 117 Copy
Click here to upload
Uploaded

After Uploading Form 117, Application will move to ICAI MSS Section for Approval. User will receive the confirmation of approval/Rejection. User can check the application Status, refer the below steps.



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To Open Partial Filled Application or Status of Submitted Application, Click on Submitted Application as highlighted kited below:

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&check...

Welcome Jyoti Member (MRN : 554519)

Home Contact Us Logout

Firm Module

- Firm Card / Certificate
- Firm Document Download
- Firm New Application
- Submitted Applications**

The Institute of Chartered Accountants of India
Setup by an Act of Parliament

Membership Status : Active
Membership Type : ACP
COP Status : Active (Full Time)
Last Membership Fees Paid : 2019-20
Region : North

Note : Please click on side menu bar to access various forms

Membership Id	554519	First Name	Jyoti	Gender	FEMALE
Mobile Number	9812189622	E-Mail Address	sanjujyoti1@gmail.com	Phone Number	9255127462
Nationality	INDIAN	Saarc Nationality	INDIA	PAN Card Number	agdpn0427d

New Contact Details

Click on “For Request of New Firm/Conversion to LLP” Tab as highlighted kited below

cdn3.digialm.com/EForms/loginAction.do?subAction=DisplayListFormProfile&userid=NRO0151573@icai.org&orgId=1666&formId=56767&check...

Welcome Jyoti Member (MRN : 554519)

Home Contact Us Logout

Firm Module

- Firm Card / Certificate
- Firm Document Download
- Firm New Application
- Submitted Applications**

For Active Firms

Firm Constitution (Form 18)

Change Request Form

Firm Merger Form (Form E)

Firm For Goodwill Form

For Request of New Firm/Conversion to LLP



System will display all user applications, click on button below action tab as highlighted below:

Welcome, JYOTI
Member (MRN : 554519)

HomeContact Us



The Institute of Chartered Accountants of India
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Membership Status : **Active**
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Last Membership Fees Paid : **2019-20**
Region : **North**

Firm Module

Note : Please click on side menu bar to access various forms

For Request of New Firm/Conversion to LLP

Refresh

Action	Application Seq No
	660202070100038
	110417144200055
	100927021500020
	391471
	181028183800021

System will display following screen, Click on Form 117 and then Firm name approval (Form 117) as highlighted below

Self Services Portal

cdn3.digialm.com/EForms/loginAction.do?sub

Firm Module

Branch Office Details

Change Request Form

Conversion to LLP

Demerger Details

Firm Closure Details

Form 117

Form 18

Member Partner Details

Merger Details

Paid Assistant Details

Submitted Applications



Firm Name Approval (Form 117)



System will display the following screen, click on eye button as highlighted below:

Firm Module

Form 117

Select Your Filter Criteria

Refresh

Action	Approved Firm Name	Firm Registration No	Approver Action Date(dd/MM/yyyy)	Date When Moved ToApprovers Queue(dd/MM/yyyy)	Logged User Id	Mapped Members	Number of Partners	Firm Consti
	JYOTI KAPIL KOCHAR & CO	FNA212439	20/Aug/2019	20/Aug/2019	554519	554519	1	

System will display the following screen, where status of Application would be displayed.

Form Status	✓ Submitted
OTP Declaration Status	✓ Completed
Form-117 PDF Upload Status	✓ Completed
Application moved to RO	✓ Yes
Approver Action	✓ Approved