



User Manual for “Firms: Change of Firm name of existing firm (Form 117)”

This User Manual IS intended for already registered members (HO Incharge) who are Partner in Existing Firm and Would like to apply for Change in name of Existing Firm.

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 and a 'President's Message' for July 2019.

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 (HO Incharge) 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



Following Screen will appear, Click on Submitted Application-> For Active Firms as Highlighted below

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

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

Following Screen will appear, Click on Firm Name as highlighted below & click on Action Button

Welcome JYOTI
Member (MRN : 554519)

Home Contact Us Logout

(Setup by an Act of Parliament)

Last Membership Fees Paid : 2019-20
Region : North

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

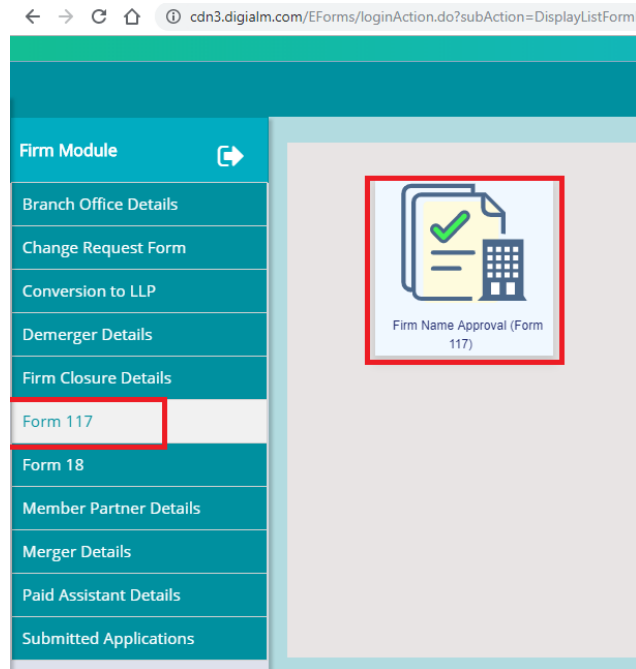
For Active Firms

Refresh

Action	Membership Id	Firm Association Start Date(dd/MMM/yyyy)	Firm Association End Date(dd/MMM/yyyy)	Firm Name	Firm Registration No	Firm Status	Is Br
	554519	20/Aug/2019		JYOTI KAPIL KOCHAR & CO	035714N	Active	



Click here on Form 117 and then Firm Name Approval(Form 117).



Following Screen will appear to user, Click on Action Button.

Firm Module					
Form 117					
Select Your Filter					
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
	JYOTI KAPIL KOCHAR & CO	035714N	20/Aug/2019	20/Aug/2019	554519

Details of Existing Firm would be displayed to HO-Incharge

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

☒ Firm Name Change Request

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Request Status: **Approved**
Request Id: **REQNEWFN**
Remarks: ON THE BASIS OF HUSBAND NAME AS KAPIL KOCHAR AS PER AFFIDAVIT
Approved Firm Name: JYOTI KAPIL KOCHAR & CO

Firm Details | Firm Name App... | Branch Office ... | Member Partne... | Paid Assistant ... | Member Declar...



Following Pop-up Screen will appear, Click ok.

Alert

Member Id 554519 is already Head Incharge in Following Firm(s):-

Firm Registration	Firm Name	Firm Address
035714N	JYOTI KAPIL KOCHAR & CO	w/o kapil kochar, nagpal chowk, h.no-183 ward-7,bhiwan basti, FATEHABAD, HARYANA, INDIA, 125050

OK

System will display following screen where Existing Firm Details would be available. Process of Firm Name Change would be same as Approval of new Firm Name, Edit the Firm name and Proceed for Check Availability and Submission.

FORM - 117

Firm Details

Firm Details

*Firm Name Request For?
Firm Name Change

*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

Previous Firm Name Details

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

Other Firm Name

☐ Make this Name as 1st priority

Validate Firm Name(s)

Address of the Head Office

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

*Firm Address Line 1
w/o kapil kochar

*State
HARYANA

*Pin Code
125050

*Firm Email Id
Sanjayjyoti1@gmail.com

Firm Address Line 2
nagpal chowk

Firm State Code
HR

Country
INDIA

*Mobile Number
9812189622

Firm Address Line 3
h.no-183 ward-7 bhiwan basti

*City
FATEHABAD

*Phone Number With STD Code
9255127462

Firm Address Line 4

Branch Code
HISAR

Generate OTP

SUBMIT



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.

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

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, bhikhan 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 Downloaded 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:

[Home](#)[Contact Us](#)

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**

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