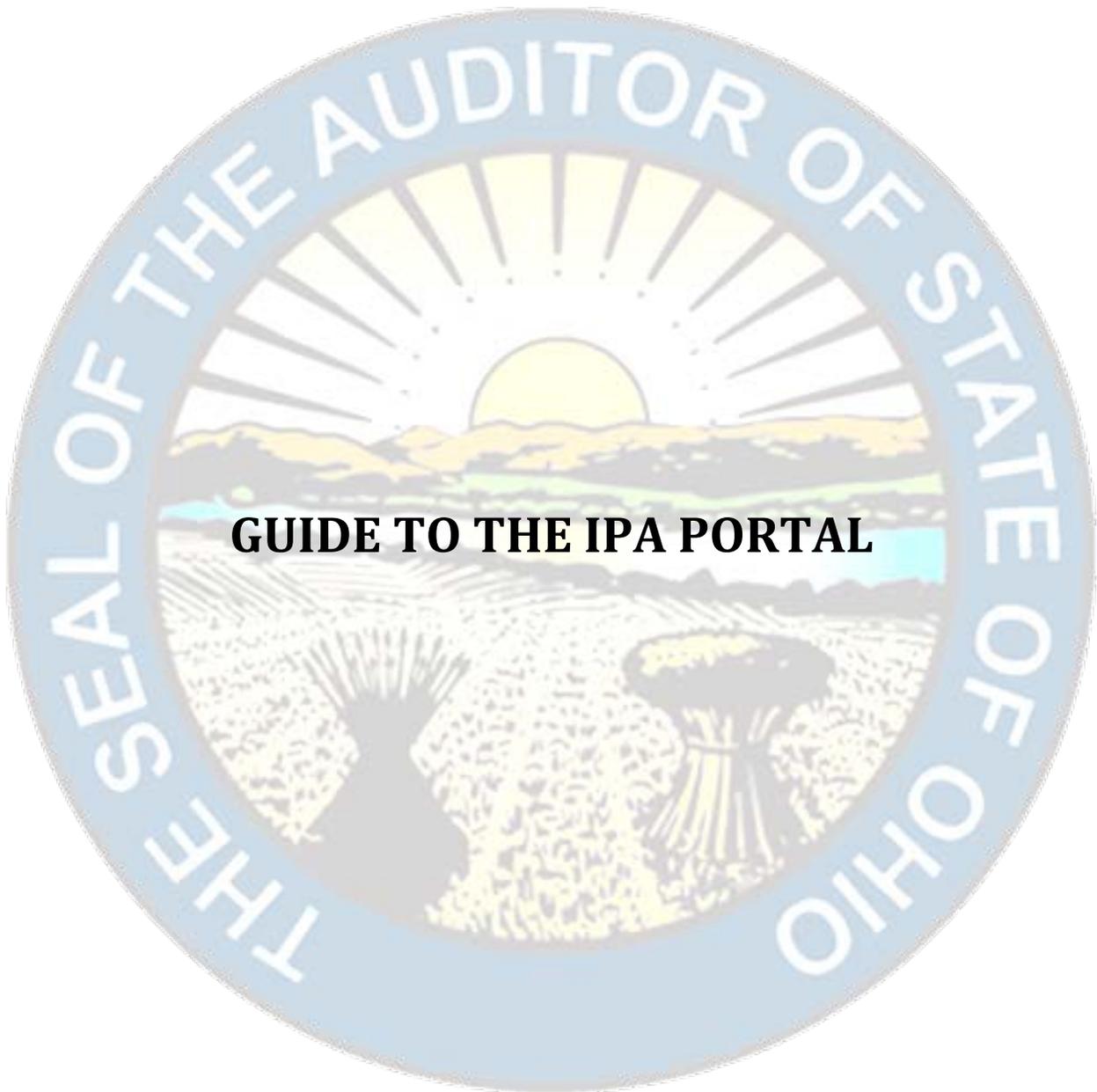




Dave Yost • Auditor of State



**GUIDE TO THE IPA PORTAL**



# Dave Yost • Auditor of State

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# Guide to the IPA Portal

Registered firms with the Auditor of State’s Office with Active or Suspended Status will have access to the IPA Portal. Firms with Suspended Status will have limited access to certain applications in the Portal.

An individual’s capabilities on the IPA Portal are dependent upon the role assigned to him/her. Please refer to the “Update Firm Information, Contacts and Office” section for further information related to assigning roles.

To **Log In** to the Auditor of State IPA Portal, [CLICK HERE](#). Enter **Username** and **Password**. Then click the **Log in** button (Figure 1).

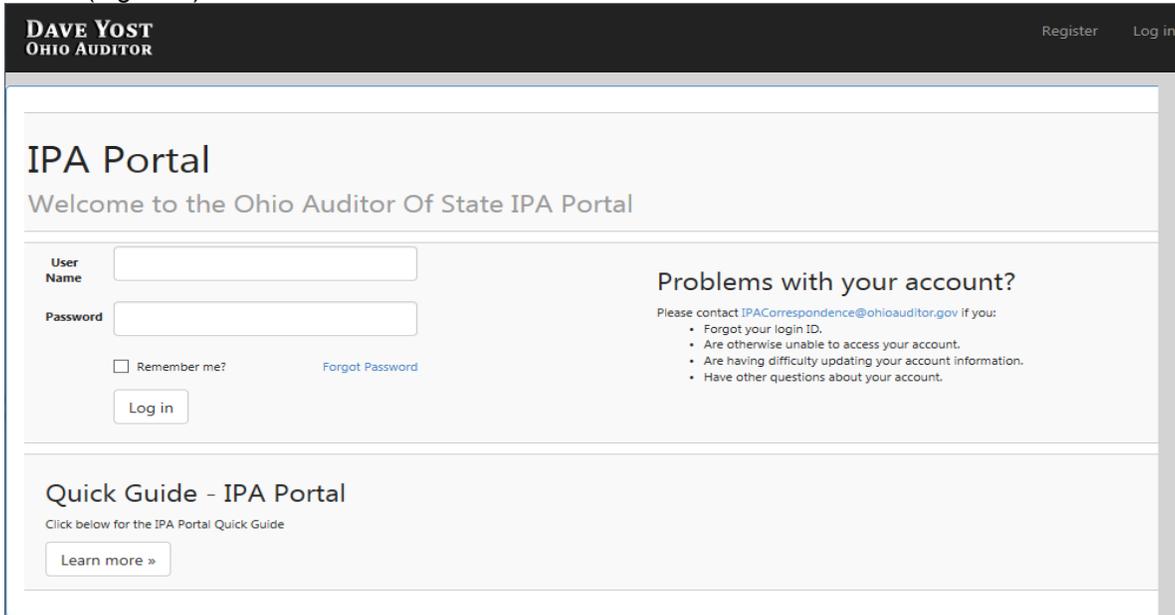


Figure 1

The following webpage will open (Figure 2).

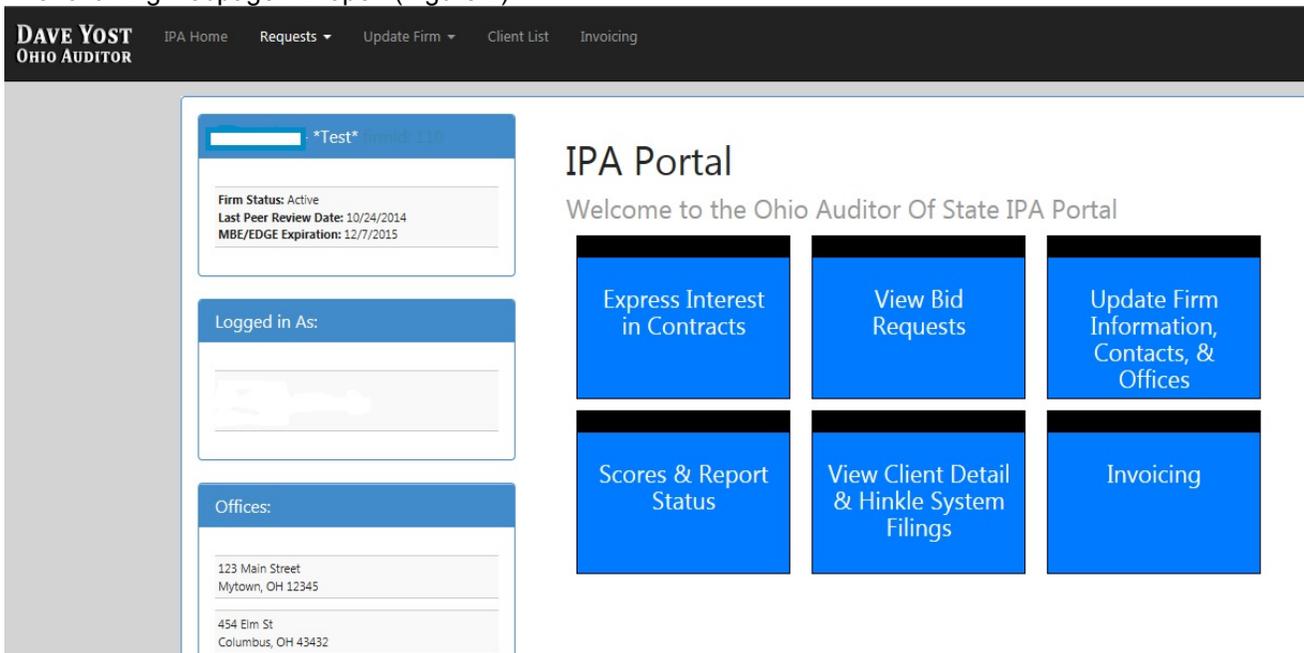


Figure 2



# Guide to the IPA Portal

## Express Interest in Contracts

Click the **Express Interest in Contracts** block (Figure 2). The following webpage (Figure 3) will open.

**Express Interest in Contracts**

Please select which office you are submitting requests for:

123 Main Street Mytown, OH 12345     123 Some Street Columbus, OH 43082 ★

This list identifies all current jobs available for IPA firms to an express an interest in performing the identified work under contract with the Auditor of State. Postings will remain on this listing until the stated "Request Deadline" at which time they will move to the IPA Closed Bid List in the "View Bid Requests screen."

NOTE: The AOS will select firms to receive an RFP from those who express interest. However, expressing interest does not guarantee the firm will receive the RFP.

Region	Request Deadline	Contract Number	Public Office	Contract Period	Tier	Criteria	County	Audit Type	Total Audits	Frequency	<span style="color: green;">★</span>
	1/12/2016	688B1-9841B	Jefferson Health Plan	7/1/2011 - 6/30/2016	1	3	Jefferson	OCBOA-Regulatory	5	Annual	<input type="checkbox"/>
	1/12/2016	A4EGF-493E1	Barnes Joint Township Cemetery	1/1/2010 - 1/12/2016	3		Highland	OCBOA-Regulatory	3	Biennial	<input type="checkbox"/>
	1/12/2016	A7FEB-3EF04	Columbiana Metropolitan Housing Authority	7/1/2011 - 6/30/2016	2		Columbiana	GASB 34, Single Audit	5	Annual	<input type="checkbox"/>

★

★ **Step 1:**  
Select the office for which you are submitting requests.

★ **Step 2:**  
Check all contracts interested in for the office chosen in Step 1. Only one office per firm may express interest in bidding on an individual entity/bundle contract. If different offices of the firm are expressing interest on different contracts, each office will need to submit separate requests.

★ **Step 3:**  
Click the **Add Selected Requests** button at the bottom.

Figure 3

**Note:** Postings will remain on this listing until the stated **Request Deadline** at which time they will move to the [IPA Closed Bid List](#).

If you have been designated as the Processing Role, when the **Add Selected Requests** button (Figure 3) is clicked in the prior step, the following webpage will open (Figure 4). If required or preferred criteria are listed, the firm will need to briefly describe how they will meet each one (Figure 5). Click on **Cancel** button to return to the prior screen to make changes. When all information is correct, click the **Save Request for Partner to Approve** button

### Bid Confirmation example with no Required/Preferred information

Bid Confirmation

**Confirm your selected office**  
 ABC Auditors, Inc. - \*Test\*  
 123 Main Street  
 Mytown, OH 12345  
 Process User  
 processuser@abcfirm.com  
 1234567890

**Confirm selected Contract(s)**  
 E6F3A-1510A - Washington Township

**Confirm Bid**

Click Cancel to return to the prior screen to make any changes.

Figure 4



# Guide to the IPA Portal

## Bid Confirmation example with Required/Preferred information

The screenshot shows a 'Bid Confirmation' window. It contains the following sections:

- Confirm your selected office**  
ABC Auditors, Inc. - \*Test\*  
123 Main Street  
Mytown, OH 12345  
Process User  
processuser@abcfirm.com  
1234567890
- Confirm selected Contract(s)**  
68BB1-9841B - Jefferson Health Plan
- Required/Preferred information**  
One or more of the contracts you have expressed an interest in contains certain required and/or preferred criteria for the firm, including but not limited to the items listed below. In the box provided, please briefly describe how your firm and/or assigned staff meets each criteria.
- 68BB1-9841B - Jefferson Health Plan**  
List previous experience auditing entities subject to regulations by the Ohio Department of Insurance. [Required]
- 68BB1-9841B - Jefferson Health Plan**  
List any certifications earned, memberships to insurance trade or professional associations by staff. [Required]
- 68BB1-9841B - Jefferson Health Plan**  
List relevant and timely insurance industry education courses taken by staff. [Required]
- Confirm Bid**
- 

A callout box on the right says "Required/Preferred Information must be added" with an arrow pointing to the three text input fields.

Figure 5

**Partner Roles** can Express Interest in Contracts using the same steps as above, however, a Submit Request button will be available rather than Save Request for Partner to Approve. (Figure 6)

The screenshot shows a 'Bid Confirmation' window for a Partner Role. It contains the following sections:

- Confirm your selected office**  
ABC Auditors, Inc. - \*Test\*  
123 Main Street  
Mytown, OH 12345  
Partner User  
partner@abc.com  
6145551212
- Confirm selected Contract(s)**  
00A18-B5D05 - Keystone Local School District
- Confirm Bid**
- 

A callout box on the right says "Partner Role can Submit Request" with an arrow pointing to the "Submit Request" button.

Figure 6



# Guide to the IPA Portal

**Partner Role** - To submit requests a Processing Role has expressed interest in; select the **Requests** drop down menu (Figure 7). Select **Bid Approvals Needed** from the drop down menu. The following webpage will open.

**Drop Down Menu**

- Express Interest in Contracts
- View Bid Requests
- Scores/Report Status
- Bid Approvals Needed

**Table Data:**

Region	Request Deadline	Contract Number	Public Office	Contract Period	Tier	Criteria	County	Audit Type	Total Audits	Frequency
	1/1/2016	E8CLC-07D0F	Liberty Township	1/1/2010 - 1/12/2016	3		Highland	OCBOA-Regulatory	3	Biennial

**Step 1 - Select project.**

**Step 2 - Click Approve Selected Bids**

Figure 7

After clicking **Submit Request** (Figure 6) or **Approve Selected Bids** (Figure 7), the contracts in which you expressed interest will appear on the **View Bid Request** page (Figure 8).

## View Bid Requests

Click on the **View Bid Requests** block (Figure 2) to view current and closed bid requests.

**Current Bid Requests 2**

Contract Number	Audits	Posted	Expires	Bidding Office	firm id	office id	
0B921-1E158	Paint Creek EMS /	12/01/2011	01/12/2016	123 Some Street Columbus, OH 43082	125	246	Remove
001BF-87339	Joseph Badger Local School District /	02/15/2012	01/12/2016	123 Some Street Columbus, OH 43082	125	246	Remove

**Closed Bid Requests 0**

There are no items to display

**Click Remove prior to the expiration date if the firm no longer desires to express interest in the respective contract.**

Figure 8



# Guide to the IPA Portal

## Add/Update Firm Information, Contacts, & Offices

Click on the **Update Firm Information, Contacts, & Offices** block (Figure 2) to update firm documents, add/update a firm office and add/update firm contacts. The following webpage (Figure 9) will open.

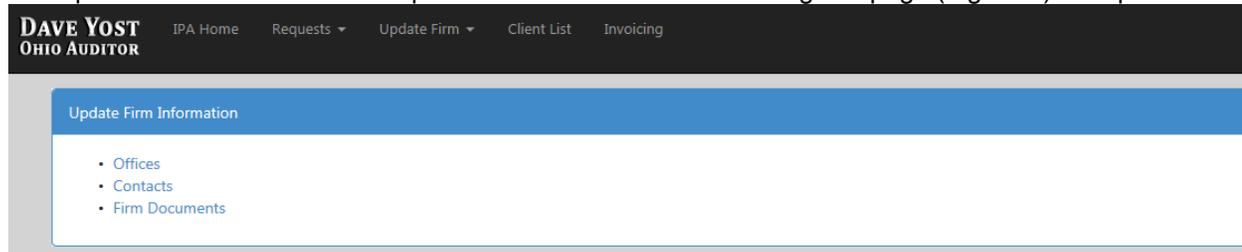


Figure 9

## Office Roles

In our effort to expand access to the IPA Portal to all IPA staff, we have established “Roles” to control access to perform certain functions by individuals within the firm. The three roles which have been established are Partner Role, Processing Role and View Only Role. Roles will be assigned to each contact as determined by the Firm’s Partners. Consideration should be given for necessity to access information such as client contact, filing dates, scores, etc.

### Partner Role

Multiple partners can be added per office and have the ability to perform all functions. We have eliminated the ‘primary contact’ as the only person able to perform functions on the portal.

- Access to all applications on the IPA Portal
- Must add firm offices
- May add firm contacts
- Must upload modified documents, if applicable (GAGAS Peer Review Report, Equal Employment Policy, Policy on Auditor Independence, MBE/EDGE Certificate)
- May express interest in contracts; Must submit requests for expressing interest in contracts
- May prepare invoices; Must submit invoices for approval
- Must assign roles to staff

### Processing Role (managers and/or administrative staff)

- Access to all applications on the IPA Portal
- May express interest in contracts, pending Partner Role final approval and submission
- May prepare invoices, pending Partner Role final approval and submission
- May add firm contacts and updates staff profiles; however, roles for staff must be assigned by Partner Role.

### View Only Role

- View only access to most applications on the IPA Portal (view scores, view client annual financial report filings, etc.)
- May update own profile

As we move toward using a forms-driven approach for firms to create proposals, quotes and bids via the IPA Portal, IPAs will be able to capture repetitive firm data (audit staff profiles, training/CPE, previous audit experience, etc.) in preparing their submission. Contact profiles should be created and updated in anticipation of this streamlined process (Refer to Figure 15).



# Guide to the IPA Portal

## Adding/Updating an Office

**Partner Role** - Click **Offices** link (Figure 9) to add or update an office. The following webpage (Figure 10) will open. This screen lists all of the Firm's current offices.

Primary Office	Address	Date Entered	
Yes	123 Main Street Mys town, OH 12345	8/20/2013 5:21:00 PM	Edit
No	5678 Oak St Mys town, OH 12345		Edit
No	789 Elm Street Anytown, OH 54321		Edit
No	123 Some Street Columbus, OH 43082	10/7/2015 12:08:00 PM	Edit

Figure 10

Click the **New Office** button to add offices. The following webpage (Figure 11) will open. Note: Only those with a Partner Role may add new offices.

**New Office**

**Address:**

**Address2:**

**City:**

**State:**

**Zip:**

**Primary Office:**

**Partners:**

**Managers:**

**In Charge/Seniors:**

**Assistants:**

[Back to List](#)

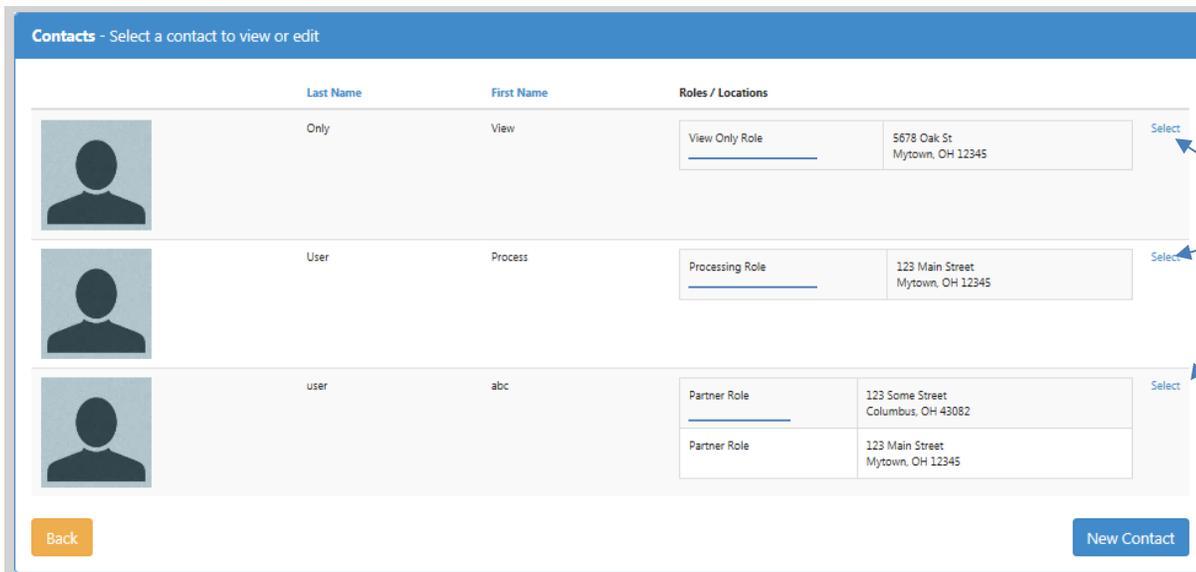
Figure 11



# Guide to the IPA Portal

## Add Contacts/Update Contact Information

Click on **Contacts** link (Figure 9) to view the contact listing. Firm personnel with Partner Role or Processing Role will be able to view the entire Firm's contact listing. In addition, Partner Roles or Processing Roles will be able to add new contacts and edit all contact profiles. Processing Roles can add contacts; however, only those with Partner Role can assign Roles to contacts. Contacts added by Processing Roles will be given a View Only Role unless additional access is given by a Partner Role. Individuals with View Only Role will only be able to view and edit their own Profile.



Click to edit Profile information

Figure 12

Click the **New Contact** button (Figure 12) to add a new firm contact. The following webpage (Figure 13) will open:

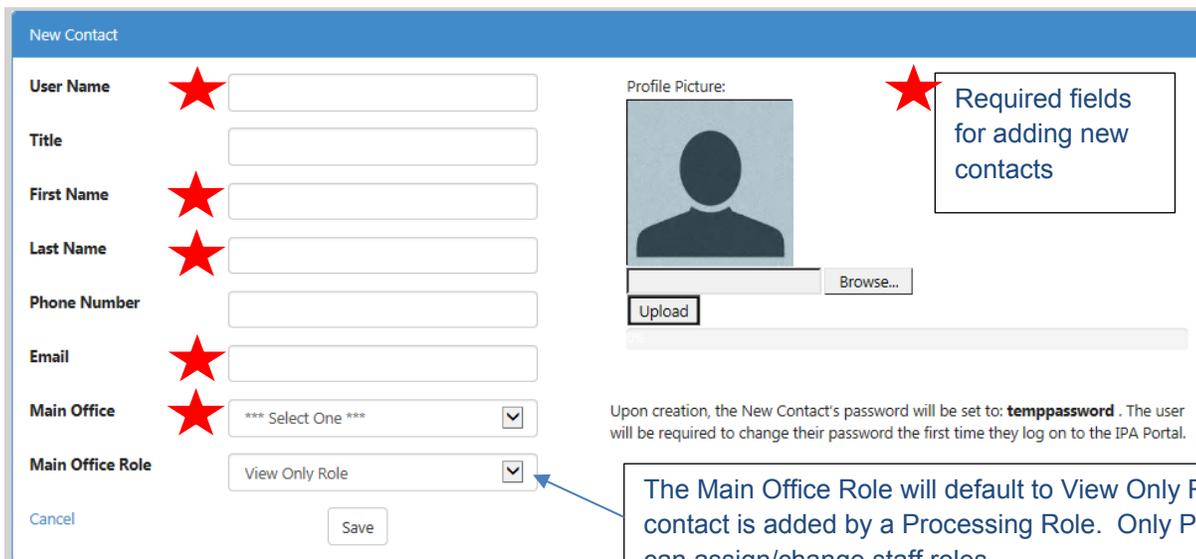


Figure 13

User Name – Upon creation, the User Name should be provided to the New Contact for Log In. The New Contact's password will be set to **temppassword**. The user will be required to change their password the first time they log on to the IPA Portal.



# Guide to the IPA Portal

Click **Select** (Figure 12) to update Contact information. The following webpage (Figure 14) will open.

### Account/Security Tab

- ★ Partner and Processing Roles have ability to Reset Passwords. An email will be sent to user with a temporary password which will be required to be changed upon log in.
- ★ Partner Roles have the ability to add additional roles and offices to staff.
- ★ Click to Edit Profile. A Profile picture can also be uploaded.

### Contact Profile Tab (Figure 15)

- ★ Click to Update CPE, Education, Certifications and Experience.

Figure 14

Figure 15



# Guide to the IPA Portal

## Update Firm Documents

Select **Firm Documents** link (Figure 9). The following webpage (Figure 16) will open. Documentation that can be updated includes: Equal Employment Policy, GAGAS Policy on Auditor Independence, GAGAS Peer Review Report and MBE/EDGE certificate.

**DAVE YOST**  
OHIO AUDITOR

IPA Home Requests Update Firm Client List Invoicing Partner Log off

### Firm Documents

Note: All documents attached MUST be in PDF format

**The firm's Statement of Policy indicating commitment to Equal Employment Opportunity:**

Status	File Name	Added By	Added Date
There is currently no equal Employment Opportunity documents on file for this firm. Please add one below:			
Add New PDF: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>			

**The firm's policy on auditor independence specific to Government Auditing Standards:**

Status	File Name	Added By	Added Date
There is currently no qual Government Auditing Standards documents on file for this firm. Please add one below:			
Add New PDF: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>			

**A copy of the firm's most recent external quality control review (Government Auditing Standards):**

Status	File Name	Added By	Added Date
Pending	test peer review report.pdf	Partner	10/13/2015 3:19:34 PM
			<a href="#">Remove</a>

**A copy of the firm's most recent Certification Of Qualified Minority Business:**

Status	File Name	Added By	Added Date
There is currently no Certification Of Qualified Minority Business documents on file for this firm. Please add one below:			
Add New PDF: <input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload"/>			

Note: Changes submitted on this Update Documentation page must be reviewed and accepted by the AOS; therefore, changes will not be immediately reflected in your firm's account.

To submit a new document, 1) select Browse to locate the file and 2) select Upload. The file will be reflected as "Pending" until reviewed and accepted by AOS.

A "remove" option will be available until the document is accepted by AOS.

Figure 16



# Guide to the IPA Portal

## Scores & Report Status

Click on **Scores & Report Status** block (Figure 2) to access your firm's scores (Figure 17) and currently contracted reports (Figure 18) which have either not been received by the Auditor of State or have been received by the Center for Audit Excellence but not yet certified to the Clerk of the Bureau.

DAVE YOST OHIO AUDITOR | IPA Home | Requests | Update Firm | Client List | Invoicing

Scores & Report Status | 10/8/2015 2:53:07 PM

★ Scores | Awarded Contract Projects

Overall Scores

Number of Reports: 0	Backlog Score: 5
Overall Report Score: 0.00	Backlog Number of Reports: 0
Overall Work Paper Score: 0.00	Backlog Late Reports: 0
Overall Timeliness Score: 0.00	Backlog Late Percentage: 0.00 %

View Projects Used for Scores 0

View Projects Used for Backlog 0

### ★ Scores

Overall firm scores

Click here to view the individual engagement scores

Click here to view the individual engagements included in the backlog score

Figure 17

DAVE YOST OHIO AUDITOR | IPA Home | Requests | Update Firm | Client List | Invoicing

Scores & Report Status | 10/13/2015 3:44:35 PM

Scores | Awarded Contract Projects ★

View Contracted Projects by Due Date 1

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by CFAE	Date Returned to IPA
29D94GREE-F1114	Xenia Community School District	07/01/2013 to 06/30/2014	12/31/2014		

View Contracted Projects by Customer 1

### ★ Awarded Contract Projects

Click here to view your firm's contracted projects by due date

Click here to view your firm's contracted projects by customer

Figure 18



# Guide to the IPA Portal

## View Client Detail and Hinkle System Filings

To access client contact information and view financial data filings with the Hinkle System select **View Client Detail and Hinkle System Filings** (Figure 2)

### Client Listing

The Client Listing (Figure 19) will include the Client ID, Client Name, and County for each client currently under an open contract with the IPA firm.

**Note:** To access the detail information for a specific client, click on the client name.

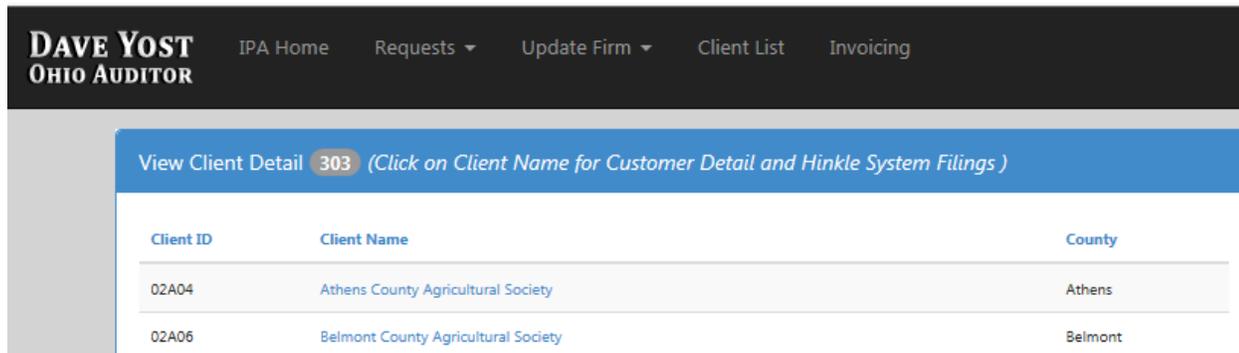


Figure 19

### Customer Detail

Beginning with 2015 filings, all entities with a filing requirement are required to upload a PDF of the unaudited financial statement compilation. Financial data will also be inputted into the system by the client for select entity types.

Customer Detail will provide the contact information as known to the Auditor of State and access to the annual financial data filings. If the contact information is out of date and requires changes, please email changes to [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov).

**Note:** To access the Hinkle System Data Viewer (Figure 21), click on the applicable year under the **Years** column of the Hinkle System Data table (Figure 20).

**Note:** To access the unaudited financial statement compilation, click on the file name for the applicable year located in the "FS Upload" column. (Figure 20) The PDF document which the client has filed will open and can be saved.



# Guide to the IPA Portal

DAVE YOST OHIO AUDITOR IPA Home Requests Update Firm Client List Invoicing

## Customer Detail

Customer Information		Hinkle System Data						
Cust Number:	13A27	Filing ID	Years	Status	Filing Type	Due Date	Filed Date	FS Upload
Cust Name:	Butler County	1309	2014	Submitted	GAAP	6/1/2015 12:00:00 AM	5/29/2015 4:56:26 PM	13A27_2014.pdf
Cust Type:	County	287	2013	Submitted	GAAP	5/30/2014 12:00:00 AM	5/30/2014 6:12:10 PM	
Region:	Southwest							
County:	Butler							
UAN Number:								
UAN Active:	No							
<a href="#">Request 'BILL TO' Address Change</a>								
Addresses								
BILL TO								
COUNTY AUDITOR								



Figure 20



# Guide to the IPA Portal

## Hinkle System Data Viewer

The Hinkle System Data viewer (for select entity types) provides the information filed by the client for the year indicated. The data can be exported to an excel worksheet by clicking the “Export to Excel” link.

### Hinkle System Data Viewer

Butler County 13A27 - (2014 - -GAAP)

[Export to Excel](#)

#### Statement Of Net Position - Governmental Activities

**- Assets -**

Assets Cash And Cash Equivalents	\$143,773,220
Assets Investments	\$0
Assets Inventory Held For Resale	\$0
Assets Materials And Supplies Inventory	\$848,742
Assets Accrued Interest Receivable	\$268,529
Assets Accounts Receivable	\$985,207
Assets Internal Balances	\$-76,163
Assets Intergovernmental Receivable	\$0
Assets Prepaid Items	\$1,714,593
Assets Property Taxes Receivable	\$61,768,735
Assets Special Assessments Receivable	\$8,753,976
Assets Sales Tax Receivable	\$10,067,294
Assets Revenue In Lieu Of Taxes Receivable	\$7,363,052
Assets Due From Other Governments	\$39,890,589
Assets Notes Receivable	\$0
Assets Loans Receivable	\$898,871
Assets Investment In Joint Venture	\$0

Figure 21

Please contact TD&F at [tdandf@ohioauditor.com](mailto:tdandf@ohioauditor.com) if you



# Guide to the IPA Portal

## Invoicing

If you have been designated as the Partner Role or Processing Role, click the **Invoicing** block (Figure 2) to submit invoices for approval. The following webpage will open (Figure 22).

**DAVE YOST OHIO AUDITOR** IPA Home Requests Update Firm Client List Invoicing

**Invoicing - Billable Projects 3 - Select a Project Number** Billable Projects  All Projects:

Filter List:

Project Number	Client Name	Client County	Region	Audit Period	Contract Hours	MBE/Edge Required	Contract Amount	Billed Amount	% Used	Remaining Contract Amount	Date To COB	Released by COB	Days Remaining To Bill	Final Invoice
13A27BUTL-FI113	Butler County	Butler	Southwest	01/01/2013 to 12/31/2013	2,800.0	Yes	\$140,000	\$0	0%	\$140,000	9/15/2015		n/a	No
13B00ASHL-FI112	Ashland County	Ashland	Central	01/01/2012 to 12/31/2012	790.0	No	\$47,400	\$0	0%	\$47,400	9/1/2015	9/1/2015	51	No
29D94GREE-FI114	Xenia Community School District	Greene	West	07/01/2013 to 06/30/2014	530.0	No	\$26,500	\$0	0%	\$26,500	Not yet received		n/a	No

Figure 22

“Billable Projects” are all “current” projects that have not been released by the COB or those that are within 90 days past the Released by the COB date (refer to page 18 for additional information). To view all firm projects, click the “All Projects” bubble (Figure 22).

Each of the columns can be sorted by simply clicking on the heading to sort the entire list. In addition, an entity name, project number, etc. can be entered into the “Filter List” space to easily locate the project to be invoiced.

Click on the Project Number to select a project to invoice. The following webpage will open (Figure 23):

**DAVE YOST OHIO AUDITOR** IPA Home Requests Update Firm Client List Invoicing

**Invoicing - Project Detail - Butler County - 01/01/2013 to 12/31/2013**

**Client Name:** Butler County **Audit Description:** CAFR Comprehensive Annual Financial Report  
**Client Contact Information:** GASB 34 Financial Audit  
A133 Single Audit

**Client County:** Butler **MBE/EDGE Required:** Yes

**Report Due Date:** 9/30/2014 **Contract Hours:** 2,800

**Date Received by Center:** 9/30/2014 **Contract Amount:** \$140,000

**Date to COB:** 9/15/2015 **Cumulative Billed:** \$0

**Current Year of contract:** 3 of 3 **Amount Remaining:** \$140,000

**Percent Used:** 0%

**MBE/EDGE Amount:** \$0

**MBE/EDGE Percent Used:** 0%

**Invoice History:**

Invoice Date	Service Date From	Service Date To	IPA Amount	MBE/EDGE Firm Name	MBE/EDGE Amount	Total Invoice Amount	Final Invoice	Final Invoice Hours	Status	Created By	Submitted By
There are no invoices created for this Project.											

Figure 23



# Guide to the IPA Portal

## Add a New Invoice

If you have been designated as the Processing Role, click the **Add New Invoice** button (Figure 23). The following webpage will open (Figure 24).

**Invoicing - Detail - New - Butler County - 01/01/2013 to 12/31/2013**

Service From Date:  to:

Invoice Amount for IPA: \$

Amount to MBE/EDGE firm: \$

MBE/EDGE Firm Name:

Total this Invoice: \$

Total Actual Hours:

Project Summary	
Contract amt:	\$140,000
Cumulative Billed:	\$0
Contract hours:	2,800
Remaining Amount:	\$140,000
Used %:	0.0%
MBE Amount:	\$0
MBE/EDGE Used %:	0.0%

Warning: This project has been submitted to the Clerk of the Bureau by submitted for this project. Please ensure the total amount invoiced agrees to the full amount to be billed to the client for this engagement.

Items will update as information is entered.

Cancel Save for Later

- ★ **Step 1:**  
Enter service dates to be billed.
- ★ **Step 2:**  
Enter amount billed on this invoice.
- ★ **Step 3:**  
If applicable, enter Amount attributed to MBE/EDGE firm and select the contracted MBE/EDGE firm. Note: MBE/EDGE can be entered on any or all invoices. If not included prior to the final invoice, the full amount will be required on the final invoice.
- ★ **Step 4:**  
Enter Actual Project Hours. Note: This step is only REQUIRED on the final invoice. This field is grayed out when the Date to COB has not yet been entered.
- ★ **Step 5:**  
Click "Save for Later" for Partner submission.

Figure 24

**Partner Roles** can Add a New Invoice using the same steps as above; however, a **Submit Invoice** button (Figure 25) is available to submit to AOS. Edit checks are built into the Invoicing System. When all requirements are met, the invoice will be automatically approved upon submission.

**Invoicing - Detail - New - Butler County - 01/01/2013 to 12/31/2013**

Service From Date:  to:

Invoice Amount for IPA: \$

Amount to MBE/EDGE firm: \$

MBE/EDGE Firm Name:

Total this Invoice: \$

Total Actual Hours:

Project Summary	
Contract amt:	\$140,000
Cumulative Billed:	\$0
Contract hours:	2,800
Remaining Amount:	\$140,000
Used %:	0.0%
MBE Amount:	\$0
MBE/EDGE Used %:	0.0%

Warning: This project has been submitted to the Clerk of the Bureau by the Center for Audit Excellence for release. As a result, this will be the final invoice allowed to be submitted for this project. Please ensure the total amount invoiced agrees to the full amount to be billed to the client for this engagement.

Cancel Save for Later **Submit Invoice**

Partner selects **Submit Invoice** button.

Figure 25



# Guide to the IPA Portal

For invoices entered by a Processing Role, a Partner Role can access the invoice from the Invoice History (In Progress Status), click **Edit** (Figure 26) and **Submit Invoice** (Figure 25).

**Invoicing - Project Detail - Ashland County - 01/01/2012 to 12/31/2012**

<b>Client Name:</b> Ashland County	<b>Audit Description:</b> GASB 34 Financial Audit A133 Single Audit
<b>Client Contact Information:</b>	<b>MBE/EDGE Required:</b> No
<b>Client County:</b> Ashland	<b>Contract Hours:</b> 790
<b>Report Due Date:</b> 9/3/2013	<b>Contract Amount:</b> \$47,400
<b>Date Received by Center:</b> 8/29/2013	<b>Cumulative Billed:</b> \$47,400
<b>Date to COB:</b> 9/1/2015	<b>Amount Remaining:</b> \$0
<b>Current Year of contract:</b> 4 of 4	<b>Percent Used:</b> 100%

**Invoice History: 1**

Invoice Date	Service Date From	Service Date To	IPA Amount	MBE/EDGE Firm Name	MBE/EDGE Amount	Total Invoice Amount	Final Invoice	Final Invoice Hours	Status	Created By	Submitted By	
	9/1/2015	9/30/2015	\$47,400		\$0	\$47,400	Yes	790.0	In Progress	Process		<a href="#">Edit</a>

[Cancel](#)

Invoice entered by Processing Role. Partner Role clicks on Edit, reviews and then Submits Invoice for approval.

Figure 26

Once the Invoice has been submitted by the Partner Role, a *Notification of Approval Invoice* email will be automatically generated to the submitting partner and to the client contact person.

The Project Detail screen (Figure 27) will reflect an Invoice History after each invoice is submitted.

**Invoicing - Project Detail - Xenia Community School District - 07/01/2013 to 06/30/2014**

<b>Client Name:</b> Xenia Community School District	<b>Audit Description:</b> GASB 34 Financial Audit A133 Single Audit
<b>Client Contact Information:</b>	<b>MBE/EDGE Required:</b> No
<b>Client County:</b> Greene	<b>Contract Hours:</b> 530
<b>Report Due Date:</b> 12/31/2014	<b>Contract Amount:</b> \$26,500
<b>Date Received by Center:</b> Not yet received	<b>Cumulative Billed:</b> \$21,000
<b>Date to COB:</b> Not yet received	<b>Amount Remaining:</b> \$5,500
<b>Current Year of contract:</b> 1 of 5	<b>Percent Used:</b> 79.2%

**Invoice History: 2**

Invoice Date	Service Date From	Service Date To	IPA Amount	MBE/EDGE Firm Name	MBE/EDGE Amount	Total Invoice Amount	Final Invoice	Final Invoice Hours	Status	Created By	Submitted By		
	10/9/2015	9/1/2015	9/30/2015	\$15,000		\$0	\$15,000	No	0.0	Approved	abcuser	abcuser	<a href="#">View</a>
	10/9/2015	10/1/2015	10/9/2015	\$6,000		\$0	\$6,000	No	0.0	Approved	abcuser	abcuser	<a href="#">View</a>

[Cancel](#) [Add New Invoice](#)

Click to view invoice detail – See Figure 28

Figure 27

**Note:** Once an invoice has been submitted, it can no longer be modified.

Click to view invoice in a printable format – See Figure 29



# Guide to the IPA Portal

The Invoicing Detail screen (Figure 28) will reflect the information submitted.

**Invoicing - Detail - Approved - City Of Martins Ferry - 01/01/2015 to 12/31/2015**

<b>Invoice Date:</b>	08/04/2016	<a href="#">View Invoice</a>
<b>IPA Invoice Number (optional):</b>	<input type="text"/>	
<b>Service From Date:</b>	<input type="text" value="07/01/2016"/>	
	<b>to:</b>	<input type="text" value="07/31/2016"/>
<b>Invoice Amount for IPA: \$</b>	<input type="text" value="6000.00"/>	
<b>Total this Invoice: \$</b>	<input type="text" value="6000"/>	

**Project Summary**

Contract amt:	<b>\$8,700.00</b>
Cumulative Billed:	<b>\$6,000</b>
Contract hours:	<b>100</b>
Remaining Amount:	<b>\$2,700.00</b>
Used %:	<b>69.0%</b>

IPA Invoice Number is an optional field. This can be used to cross reference to the firm's internal billing system.

Figure 28

A sample Printable Invoice is reflected below. (Figure 29)

**Dave Yost**  
Ohio Auditor of State

---

\*\*\* Notification of Approved IPA Contract Invoice - Final \*\*\*

Client Contact & Address

The following represents the billing information submitted to the Auditor of State IPA Portal for the engagement services of City Of Martins Ferry for the period 01/01/2015 through 12/31/2015. This IPA contract invoice is approved by the Auditor of State and can be processed for payment to the IPA listed below.

This represents our Final invoice for services in connection with the examination of the City Of Martins Ferry for the period 01/01/2015 through 12/31/2015.

IPA Contract Invoice Information

Firm FEIN:

Project Number:

IPA Invoice Number:

Engagement Services for the period of	7/1/2016 to 7/31/2016
Final Actual Hours	0.00
<b>Current Invoice Amount</b>	<b>\$6,000.00</b>
Cumulative Billed	\$6,000.00
Fixed Fee Contract Amount	\$8,700.00
Percent Complete	68.97%

Rea & Associates, Inc. hereby certifies that all amounts set forth in this invoice are properly due and payable for work performed by either Rea & Associates, Inc. or a qualified subcontractor.

Submitted by: Ami Mayne on 8/4/2016

Please remit payment to: Invoice Amount:

Firm name & Address

Email:  Partner email address

\*\*\* Please do not send payments to Auditor of State \*\*\*

Figure 29



# Guide to the IPA Portal

## Important dates to note:

Date to COB – Invoices up to 80% of the total contract project amount can be submitted for approval. The **remaining 20% can be submitted after a Date to COB** has been entered indicating the Center for Audit Excellence (CAE) has certified the report.

Once a Date to COB has been entered by CAE, the invoicing system will only allow one FINAL Invoice to be submitted. The Final Invoice **must include** total contract project hours incurred and the portion of the fees due to the MBE/EDGE firm if the contract exceeded 800 hours.

Date Released by COB – Final invoices **may be submitted for up to 90 days** after the Date Released by COB. The Days Remaining to Bill (Figure 22) calculates the number of days left to bill. This field will remain “n/a” until a Date Released by COB is entered by the Auditor of State’s Office.

## Manual Billing

Some exceptions may exist, as determined by the Auditor of State, in which a manual invoice is required (Figure 30). In these cases, an invoice should be prepared and submitted to [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) for approval.

**Invoicing - Project Detail - City Of Logan - 01/01/2013 to 12/31/2013**

<b>Client Name:</b>	City Of Logan	<b>Audit Description:</b>	OCBOA-CA Cash Basis Financial Audit
<b>Client Contact Information:</b>		<b>MBE/EDGE Required:</b>	No
<b>Client County:</b>	Hocking	<b>Contract Hours:</b>	300
<b>Report Due Date:</b>	6/30/2014	<b>Contract Amount:</b>	\$15,000
<b>Date Received by Center:</b>	6/30/2014	<b>Cumulative Billed:</b>	\$0
<b>Date to COB:</b>	Not yet received	<b>Amount Remaining:</b>	\$15,000
<b>Current Year of contract:</b>	2 of 3	<b>Percent Used:</b>	0%

**Invoice History:** 0

Invoice Date	Service Date From	Service Date To	IPA Amount	MBE/EDGE Firm Name	MBE/EDGE Amount	Total Invoice Amount	Final Invoice	Final Invoice Hours	Status	Created By	Submitted By
There are no invoices created for this Project.											

**Cancel**  
This Project is Manual Bill only.

When a project is manual bill only, it will be indicated under the Cancel button.

Figure 30



# Guide to the IPA Portal

## Contract Modifications

To access the Contract Modification application, click on **Scores & Report Status** block (Figure 2) to access your firm's currently contracted reports (Figure 31) which have either not been received by the Auditor of State or have been received by the Center for Audit Excellence (CAFE) but not yet certified to the Clerk of the Bureau. Note: Modifications should be submitted prior to report submission to CAFE. Modifications submitted after the report submission will only be approved in limited circumstances.

### Create a Contract Modification

For those designated as the partner or processing role, locate the project for which a contract modification is needed and select "Start Contract Mod" under the Modification Status column.

DAVE YOST OHIO AUDITOR | IPA Home | Requests | Update Firm | Client List | Invoicing

Scores & Report Status | 8/4/2016 2:00:43

Scores | Awarded Contract Projects

View Contracted Projects by Due Date **192** Use the Ctrl+F keys to search for a specific project

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by CFAE	Date Returned to IPA	Modification Status
35D18LAWR-FI114	Village Of Coal Grove	01/01/2014 to 12/31/2014	3/23/2016	3/23/2016		
35F055CIO-FI214	Village Of Rarden	01/01/2013 to 12/31/2014	5/31/2016	5/31/2016		
35F065CIO-FI214	Village Of South Webster	01/01/2013 to 12/31/2014	5/31/2016	5/31/2016		
99847ROSS-FI115	South Central Ohio Job and Family Services	07/01/2014 to 06/30/2015	5/31/2016	5/31/2016		
99847ROSS-FI115	South Central Ohio Job and Family Services	07/01/2014 to 06/30/2015	5/31/2016	5/31/2016		
32J44SCIO-FI215	Washington Township	01/01/2014 to 12/31/2015	6/30/2016			Start Contract Mod.
36A04ATHE-FI215	Athens County Convention Visitors Bureau	01/01/2014 to 12/31/2015	6/30/2016			Start Contract Mod.

Select Start Contract Mod to create a contract modification.

Figure 31

The following Project Modifications screen will open (Figure 32). Select Edit to begin contract modification.

Project Modifications for: 06C22ROSS-FI115 **1** | Current User: Partner

Select "Edit" to prepare contract modification.

Once the contract modification information has been entered, select "Preview Modification Agreement Draft" to review. If the contract modification is accurate, select "Submit to Client" for client approval.

Status	Public Office Name	County	IPA Firm Name:	Original (or Modified) Contract Hours for Impact Period:	Original (or Modified) Contract Rate for Impact Period:	Original (or Modified) Contract Cost for Impact Period:	Original (or Modified) Contract Sub contractor Cost Impact for Impact Period:			
In Progress	City Of Chillicothe	Ross	<input type="text"/>	450.0	\$59.00	\$26,550	\$0	Edit	Delete	Edit and Save before submitting to Client

Preview Modification Agreement Draft

Status History

Status Date	Status	Status Notes

Select Edit to begin contract modification

Figure 32



# Guide to the IPA Portal

The following page (page 1 of 7) will open (Figure 33).

AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115

\* Public Office Name: Highland County

\* County: Highland

\* IPA Firm Name:  IPA Firm Name is pre-filled

\* Contract Name on RFP:  This field is required. ★

\* Original Contract Period:  To:  ★

\* Date RFP Was issued:  This field is required. ★

\* Date MOA Executed:  This field is required. ★

\* Public Office Contact: Bill Fawley, Auditor

\* Public Office Contact Email: bfawley@co.highland.oh.us

Current IPA Due Date: 6/30/2016

Back page 1 of 7 Next Save for later

Step 1: ★  
Enter contract name on RFP.

Step 2: ★  
Enter original contract period. If the entire contract was extended using the automatic extension process, enter the ENTIRE contract period, including the extension.

Step 3: ★  
Enter date RFP was issued.

Step 4: ★  
Enter date MOA was executed or date contract extension was signed.

Step 5: ★  
Select Next to continue to next screen or Save for later to save and close application.

Figure 33

Page 2 of 7 (Figure 34)

AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115

Fiscal Period Impacted by this Modification: 01/01/2015 through 12/31/2015

★ Category (check all that apply, at least one is required):

Change in Accounting or Audit Standards

Change in Laws or Regulations

Change in Scope

\* Is the Change in Scope to change the project from an audit to an AUP:  Yes  No

Change in IPA Report Due Date

\* New IPA Report Date:

Other: \* Explain:

If modification is a change in scope, secondary question appears to select whether or not the change is to an AUP

If modification is a due date change, field appears to enter new due date

If Other is selected, secondary field appears for explanation.

Back page 2 of 7 Next Save for later

Step 1: ★  
Select a category to describe modification. At least ONE category must be selected. Select all that apply.

Step 2: ★  
Select Next to continue to next screen or Save for later to save and close application.

Figure 34



# Guide to the IPA Portal

Page 3 of 7 (Figure 35). Enter a detailed explanation for the modification. Please be clear and concise and include all information needed to properly approve the modification.

AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115

\* Detailed Explanation for Modification. Note: This language will be incorporated in the final modification agreement.

Provide a DETAILED explanation for the modification. The language will be included in the final modification agreement

Back page 3 of 7 Next Select Next to continue to next screen or Save for later to save and close application. Save for later

Figure 35

Page 4 of 7 (Figure 36) This screen is for information purposes only. The information is extracted from the AOS database. If all information appears accurate, simply select Next to continue. If changes are required, contact [IPAcorrespondence@ohioauditor.gov](mailto:IPAcorrespondence@ohioauditor.gov).

AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115

If the information on this screen appears accurate, please select Next to continue. Please contact [IPAcorrespondence@ohioauditor.gov](mailto:IPAcorrespondence@ohioauditor.gov) if changes are required.

* Original (or Modified) Contract Hours for Impact Period:	920.00
* Original (or Modified) Contract Rate for Impact Period:	\$ 61.00
* Original (or Modified) Contract Cost for Impact Period:	\$ 56,120.00
* Original (or Modified) Contract Sub contractor Cost Impact for Impact Period:	\$ 8,418.00

Back page 4 of 7 Next Select Next to continue to next screen or Save for later to save and close application. Save for later

Figure 36



# Guide to the IPA Portal

Page 5 of 7 (Figure 37). Enter the increase or decrease in hours. Use a negative amount for decreases.

**AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115**

If the information on this screen appears accurate, please select Next to continue. Please contact [IPAcorrespondence@ohioauditor.gov](mailto:IPAcorrespondence@ohioauditor.gov) if changes are required.

If the contract modification is a reduction in cost/hours, please enter a negative amount in the Current Modification for Impact Period - Hours field.

**\* Current Modification for Impact Period - Hours:**  Enter increase or decrease in hours (use a negative amount for decrease).

**Current Modification For Impact Period - Rate:**

**Current Modification For Impact Period - Cost:**  Fields will calculate automatically after hours are entered.

**Current Modification For Impact Period Subcontractor Impact:**

**New Contract Total Hours for Impact Period:**

**New Contract Total For Impact Period Rate:**

**New Contract Total For Impact Period Cost:**

**New Contract Total For Impact Period Subcontractor Cost Impact:**

page 5 of 7  Select Next to continue to next screen or Save for later to save and close application.

Figure 37

Page 6 of 7 (Figure 38). Use dropdown to select an active MBE/EDGE firm, if necessary. Also enter any other contractors utilized during the audit. If no MBE/EDGE firm or other contractors, no action on this page is required.

**AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115**

Should this modification cause the total hours of the contract to exceed the threshold established for the use of a MBE/EDGE subcontractor, the IPA shall follow all minority participation and other relevant requirements of the original contract. If applicable, the required MBE/EDGE subcontractor with respect to this Agreement will be:

**Sub Contractor:**  Use drop down to select an active MBE/EDGE firm, if necessary. If the project exceeds 800 hours, a firm MUST be selected.

Should this modification involve the use of other subcontractors, the IPA shall follow all relevant requirements of the original contract. If applicable, the other subcontractor with respect to this Agreement will be:

**Sub Contractor:**

**Address:**  If any other contractors are utilized (other than MBE/EDGE), identify those here

If no Sub Contractors are required, select Next to continue.

page 6 of 7  Select Next to continue to next screen or Save for later to save and close application.

Figure 38



# Guide to the IPA Portal

Page 7 of 7 (Figure 39) – Appendix A is only required for modifications changing the scope from an audit to an AUP. Click Submit to close application.

**AOS Form: IPA Contract Modification Agreement Form Project: 13A51HIGH-FI115**

Appendix A is not required for this Contract Modification. Use the Submit button below to complete Contract Modification Process.

Click Submit to close application

Back      page 7 of 7      Next      **Submit**

Figure 39

Page 7 of 7 (Figure 40) – This screen opens for contract modifications for Audit to AUP scope changes only. Enter budgeted hours for the AUP engagement.

**AOS Form: IPA Contract Modification Agreement Form Project: 35C84JACK-FI215**

APPENDIX A AGREED-UPON PROCEDURES BREAKDOWN OF BUDGETED HOURS

Budgeted Hours

- \* Planning Information:
- \* Cash and Investments:
- \* Charges for Services:
- \* Income Tax:
- \* Property Tax, Intergovernmental & Other Confirmable Receipts:
- \* Other Cash Receipts:
- \* Non-Payroll Expenditures:
- \* Payroll Expenditures:
- \* Debt Service:
- \* Compliance:
- \* Other Entity Specific Procedures:
- \* Final Report:
- \* Supervision and Administration:
- Total Hours:**

Appendix A is only required for modifications changing the scope from an audit to an AUP.

Enter budgeted hours for the AUP engagement.

Total Hours must agree to the "New Contract Total Hours for Impact Period" on screen 5 of 7. An edit check is built in to ensure these totals agree.

Back      page 7 of 7      Next      Click Submit to close application      **Submit**

Figure 40



# Guide to the IPA Portal

After clicking Submit on page 7 of 7 (Figure 39 or 40), you will be redirected back to the Project Modifications page (Figure 41) where "Submit to Client" is now an option. Review the Modification Agreement Draft. Select Edit to make any changes. Select Submit to Client.

**Project Modifications** for: 13A51HIGH-FI115 1 Current User: Partner/

Select "Edit" to prepare contract modification.

Once the contract modification information has been entered, select "Preview Modification Agreement Draft" to review. If the contract modification is accurate, select "Submit to Client" for client approval.

Status	Public Office Name	County	IPA Firm Name:	Original (or Modified) Contract Hours for Impact Period:	Original (or Modified) Contract Rate for Impact Period:	Original (or Modified) Contract Cost for Impact Period:	Original (or Modified) Contract Sub contractor Cost Impact for Impact Period:	<span style="color: blue;">★</span>	<span style="color: pink;">★</span>	
In Progress	Highland County	Highland	<input type="text"/>	920.0	\$61.00	\$56,120	\$8,418	<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Submit to Client</a>

★ [Preview Modification Agreement Draft](#)

Status History		
Status Date	Status	Status Notes

**Step 1:** ★  
Click Preview Modification Agreement Draft to review the modification document.

**Step 2:** ★  
If changes are required, select Edit to make necessary changes.

**Step 3:** ★  
If no changes are necessary, select Submit to Client for client approval. Figure 42 will open.

**Figure 41**

After selecting Submit to Client (Figure 41), the following page (Figure 42) opens. Check to verify the Modification Agreement Draft was reviewed before final client submission. Select the Submit to Client button.

Please provide notes to the Client in the text box below, if necessary. Once the Contract Modification Agreement form is accurate, click the checkbox to document verification. Select the Submit to Client button for Client approval.

Notes:  By checking this box, I certify I have reviewed the Modification Agreement Draft document for accuracy.

Check to verify the Modification Agreement Draft was reviewed before final client submission.

Submit to Client button only appears AFTER box is checked.

**Figure 42**



# Guide to the IPA Portal

The Status on the Project Modifications screen (Figure 43) will be updated after submission. In addition, an *IPA Contract Modification Agreement – Client Approval Request* email will be sent to the submitting Partner and to the client contact on file with AOS.

**Project Modifications** for: 13A51HIGH-FI115 **1** Current User: Partner/ [redacted]

Select "Edit" to prepare contract modification.  
Once the contract modification information has been entered, select "Preview Modification Agreement Draft" to review. If the contract modification is accurate, select "Submit to Client" for client approval.

Status	Public Office Name	County	IPA Firm Name:	Original (or Modified) Contract Hours for Impact Period:	Original (or Modified) Contract Rate for Impact Period:	Original (or Modified) Contract Cost for Impact Period:	Original (or Modified) Contract Sub contractor Cost Impact for Impact Period:
Submitted To Client	Highland County	Highland	[redacted]	920.0	\$61.00	\$56,120	\$8,418

[Preview Modification Agreement Draft](#)

Status History		Status	Status Notes
Status Date	8/9/2016	Submitted To Client	

**Figure 43**

In addition, the Modification Status on the main screen (Figure 31) will be updated to Submitted to Client (1). See Figure 44. The (1) represents the number of modifications created for the respective project. Please note, only one contract modification can be in process at a time. A new contract modification cannot be started until the previous one is approved by AOS.

The Modification Status will be updated during the various stages of the modification process. The status definitions are as follows:

- |                        |  |
|------------------------|--|
| Pending IPA Submission | IPA prepared modification, not yet submitted for client approval |
| Submitted to Client    | IPA prepared modification, pending client approval               |
| Returned by Client     | Client denied modification, returned to IPA for corrections      |
| Submitted to AOS       | Client approved modification, submitted to AOS for approval      |
| Returned by AOS        | AOS denied modification, returned to IPA for corrections         |
| Approved by AOS        | AOS approved modification, modification is fully executed        |

Scores & Report Status 8/9/2016 10:59:40 AM

Scores Awarded Contract Projects

View Contracted Projects by Due Date **192** *Use the Ctrl+F keys to search for a specific project*

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by CFAE	Date Returned to IPA	Modification Status
13A51HIGH-FI115	Highland County	01/01/2015 to 12/31/2015	6/30/2016			Submitted To Client (1)
06C22ROSS-FI115	City Of Chillicothe	01/01/2015 to 12/31/2015	6/30/2016			Pending IPA Submission (1)

**Figure 44**



# Guide to the IPA Portal

## Client Approval/Denial of Contract Modification

Upon an IPA submission of a Contract Modification, the client's *IPA Contract Modification Agreement – Client Approval Request* email will instruct the client to log onto the Auditor of State's eServices Center to review and approve the modification.

The client has the option to either select "Approved – Submit to AOS" for approval or "Denied – Return to IPA" for corrections.

### Approved - Submit to AOS

When the client approves the contract modification, an *IPA Contract Modification Agreement – Client Approval* email is sent to the client contact, submitting Partner and AOS for review and approval. The IPA needs to do nothing at this point. The Modification Status (Figure 44) will change to Submitted to AOS.

### Denied – Return to IPA

When the client denies the contract modification, the client must provide a description of the reason for denial and an *IPA Contract Modification Agreement – Client Denial* email is sent to the client and submitting Partner. The email directs the IPA to log into the IPA Portal to make changes to the Contract Modification Agreement Form and resubmit it to the client. The IPA will need to select the project from the Awarded Contract Projects tab (Figure 31) and Edit the modification (Figure 32). The same process (Figures 33 – 40) will be followed to Submit to Client.

## AOS Approval/Denial of Contract Modification

Upon a client approval of a Contract Modification, AOS will review the modification and either approve or deny.

### **AOS Approval**

Once the contract modification has been approved by the AOS, the submitting Partner and client will receive an *IPA Contract Modification Agreement – Auditor of State Approval* email. The contract modification is considered "fully executed" as this point.

After AOS approval, the Modification Status (Figure 31) will reflect "Start Contract Mod. 1" (Figure 45). This indicates a new modification may now be created for this project if necessary. The "1" indicates the project has one modification approved for the project.

Scores & Report Status 8/9/2016 3:41:27 PM

Scores **Awarded Contract Projects**

View Contracted Projects by Due Date 192 Use the Ctrl+F keys to search for a specific project

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by CFAE	Date Returned to IPA	Modification Status
13A51HIGH-F115	Highland County	01/01/2015 to 12/31/2015	7/31/2016			Start Contract Mod. 1

Start New Contract Modification  
View Previous Modification(s)

Click Start Contract Mod. 1 to get option to Start New Contract Modification or View Previous Modification(s)

Figure 45



# Guide to the IPA Portal

The Project Modification screen (Figure 46) will maintain a Status History of each step of the process. Once the contract modification has been approved by AOS, click on View Modification Agreement to see the fully executed document.

**Project Modifications** for: 13A51HIGH-FI115 1 Current User: Partner/Ammayne

Select "Edit" to prepare contract modification.

Once the contract modification information has been entered, select "Preview Modification Agreement Draft" to review. If the contract modification is accurate, select "Submit to Client" for client approval.

Status	Public Office Name	County	IPA Firm Name:	Original (or Modified) Contract Hours for Impact Period:	Original (or Modified) Contract Rate for Impact Period:	Original (or Modified) Contract Cost for Impact Period:	Original (or Modified) Contract Sub contractor Cost Impact for Impact Period:
Approved By AOS	Highland County	Highland		920.0	\$61.00	\$56,120	\$8,418

[View Modification Agreement](#)

**Status History**

Status Date	Status	Status Notes
8/9/2016	Submitted To Client	
8/9/2016	Submitted To AOS	
8/9/2016	Approved By AOS	

Select to view fully executed Contract Modification Agreement Form

**Figure 46**

## AOS Denial

If the contract modification has been denied by the AOS, the submitting Partner and client will receive an *IPA Contract Modification Agreement – Auditor of State Denial* email. The email directs the IPA to log into the IPA Portal to make changes to the Contract Modification Agreement Form and resubmit it to the client. The IPA will need to select the project from the Awarded Contract Projects tab (Figure 31) and Edit the modification (Figure 32). The same process (Figures 33 – 40) will be followed to Submit to Client.

## Client without Email Access

For clients without email access, the IPA must contact [IPAcorrespondence@ohioauditor.gov](mailto:IPAcorrespondence@ohioauditor.gov) **AFTER** submitting the contract modification via the IPA Portal to request a pdf copy of the modification agreement form (with the IPAs approval and without the Draft watermark). The IPA must physically obtain the client’s approval and submit the modification to AOS via [IPAcorrespondence@ohioauditor.gov](mailto:IPAcorrespondence@ohioauditor.gov) for AOS approval. If the AOS agrees with the client-approved contract modification, the AOS will upload the contract modification form into the IPA Portal and finalize the approval process. If the AOS does not agree with the client-approved contract modification, the modification will be returned to the IPA for revision.

Please note, if the client has access to email, the client should utilize the Auditor of State’s Customer eServices Center to approval contract modifications. Should the client need assistance in logging into the Customer eServices Center, please refer them to [eServices@ohioauditor.gov](mailto:eServices@ohioauditor.gov).



# Guide to the IPA Portal

## Questions

If additional questions arise that are not addressed within the Frequently Asked Questions or this Quick Guide, please contact the Auditor of State's Office at [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) for assistance.