



# Dave Yost • Auditor of State

## IPA Portal

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# IPA Portal

To login to express interest to bid, [click here](#). Enter **Username** and **Password**. Then click the **Login** button.

The screenshot shows the 'IPA Portal' login page for Dave Yost, Ohio Auditor. The header includes the logo and the title 'IPA Portal'. Below the header is a 'Login' section. On the left, there is a grey box with contact information: 'Please contact IPACorrespondence@ohioauditor.gov if you:' followed by a bulleted list of reasons to contact support: 'Forgot your login ID.', 'Are otherwise unable to access your account.', 'Are having difficulty updating your account information.', and 'Have other questions about your account.' Below this list is a link 'Quick Guide - IPA Portal'. On the right, there is a login form with fields for 'Username:' and 'Password:', a 'Login' button, and a 'forgot password' link. At the bottom of the page, there is a footer with the same contact information and reasons to contact support as the grey box.

**DAVE YOST**  
OHIO AUDITOR

## IPA Portal

### Login

Please contact [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) if you:

- Forgot your login ID.
- Are otherwise unable to access your account.
- Are having difficulty updating your account information.
- Have other questions about your account.

[Quick Guide - IPA Portal](#)

Username:

Password:

Login

[forgot password](#)

Please contact [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) if you:

Forgot your login ID.  
Are otherwise unable to access your account.  
Are having difficulty updating your account information.  
Have other questions about your account.

Figure 1

The following webpage will open.

The screenshot shows the 'IPA Portal' home page for Dave Yost, Ohio Auditor. The header includes the logo and the title 'IPA Portal'. Below the header is a navigation bar with links: 'Home', 'Request Bids', 'View Requests', 'Update Firm', 'Scores/Report Status', and 'View Client Detail and AFDRS Filings'. The main content area is titled 'Home' and features a sidebar on the left and a grid of buttons on the right. The sidebar contains a profile for 'ABC Auditors, Inc. - \*Test\*' with fields for 'Primary Contact: John Doe', 'Firm Status: Active', 'Last Peer Review Date: 12/31/2014', and 'MBE/EDGE Expiration: 12/31/2014'. Below this is a 'Logged in As:' section showing 'John Doe', 'ABC.Auditor@aol.com', and a phone number '614-555-5555'. At the bottom of the sidebar are two address blocks: '123 Main Street, Mytown, OH 12345' and '5678 Oak St, Mytown, OH 12345'. The grid of buttons includes 'Request Contract Bids', 'View Bid Requests', 'Update Firm Information, Contacts, & Offices', 'Scores & Report Status', and 'View Client Detail and AFDRS Filings'.

**DAVE YOST**  
OHIO AUDITOR

## IPA Portal

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

### Home

**ABC Auditors, Inc. - \*Test\***

Primary Contact:  
**John Doe**

Firm Status:  
**Active**

Last Peer Review Date:  
**12/31/2014**

MBE/EDGE Expiration:  
**12/31/2014**

**Logged in As:**

John Doe  
ABC.Auditor@aol.com  
614-555-5555

123 Main Street  
Mytown, OH 12345

5678 Oak St  
Mytown, OH 12345

Request Contract Bids

View Bid Requests

Update Firm Information, Contacts, & Offices

Scores & Report Status

View Client Detail and AFDRS Filings

Figure 2

# IPA Portal

## Request Contract Bids

Click the **Request Contract Bids** block (figure 2). The following webpage will open.


**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

Home Request Bids View Requests Update Firm Scores/Report Status View Client Detail and AFDRS Filings

### IPA Bid List

Please select which office you are submitting requests for:

Select  Select

123 Main Street  
Mytown, OH 12345

5678 Oak St  
Mytown, OH 12345

This list identifies all current jobs available for IPA firms to 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."

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
Central	4/8/2015	0A334-A3FFB	Newark City School District / Newark Digital Academy / Par Excellence Academy (pool of 3)	7/1/2014 - 6/30/2017	2					
Southeast	4/17/2015	14933-20FD3	Switzerland of Ohio Local School District	7/1/2014 - 6/30/2017	2		Monroe	GASB 34 Single Audit	3	Annual
Southeast	4/17/2015	2135E-058A5	Oak Hill Union Local School District	7/1/2014 - 6/30/2017	2		Jackson	GASB 34 Single Audit	3	Annual
Southeast	4/17/2015	3094B-A3579	Federal-Hocking Local School District / Trimble Local School District (pool of 2)	7/1/2014 - 6/30/2017	2					
Central	4/8/2015	23307-26503	Arts & College Preparatory Academy / FCI Academy / Insight	7/1/2014 -	2					

Figure 3

### ★ Step 1:

Select the office for which you are submitting requests.

### ★ Step 2:

Check all jobs 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 Requests** button at the bottom.

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

When the **Add Requests** button is clicked in the prior step, the following webpage will open. If required or preferred criteria are listed, the firm will need to briefly describe how they will meet each one. Click on **Edit Contract Requests** button to return to the prior screen to make changes. When all information is correct, click the **Submit Request** button.

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

Home Request Bids View Requests Update Firm Scores/Report Status View Client Detail and AFDRS Filings

### IPA Bid List

#### Contracts for Bid Request

3AA13-37549 - Southern Local School District

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.

**ABC Auditors, Inc. - \*Test\***

123 Main Street  
Mytown OH 12345

John Doe  
ABC.Auditor@aol.com  
614-555-5555

Submit Request

Edit Contract Requests Cancel

Figure 4

# IPA Portal

After clicking **Submit Request** button, the following webpage will open to confirm receipt. In addition, you should receive a confirmation email shortly.

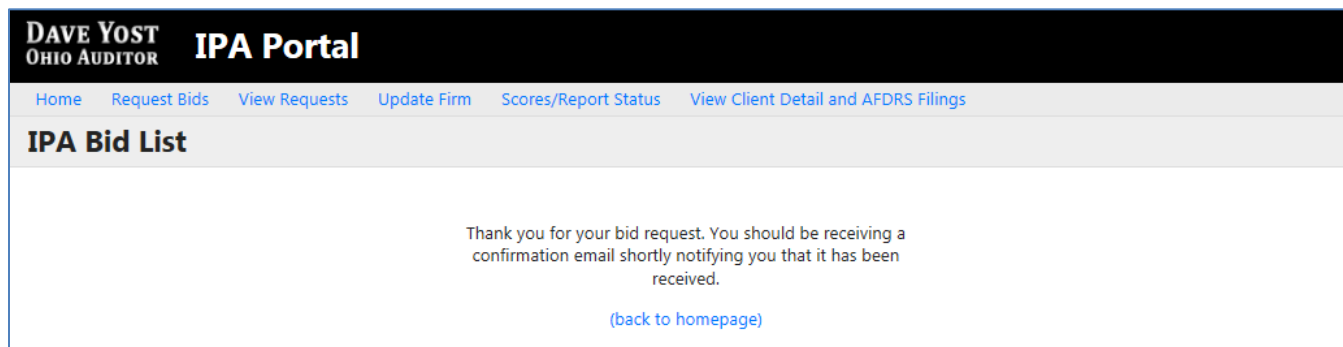


Figure 5

## View Bid Requests

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

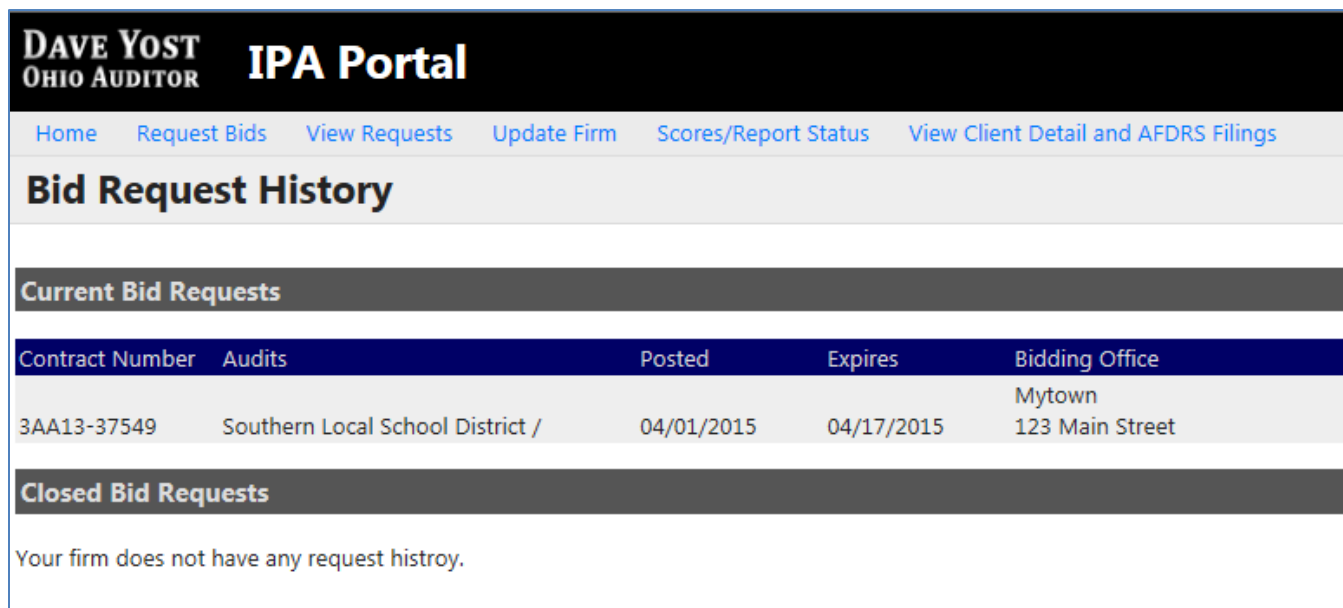


Figure 6

## Update Firm Information, Contacts, & Offices

Click on the **Update Firm Information, Contacts, & Offices** block (figure 2) to update documentation, add a new office, add a new contact, and move or reassign offices.

The Firm's **Primary Contact** will see the following (figure 7) and is able to **update documentation, Add a New Office, Add a New Contact, and Move / Reassign Offices**. Documentation that can be updated includes: Equal Employment Policy, Policy on Auditor Independence, GAGAS Policy on Auditor Independence, GAGAS Peer Review Report, MBE/EDGE certificate, and information regarding interest in performance audits.

**NOTE:** New contacts must be added before adding new offices.

The Firm's secondary contacts will see a slightly modified screen (figure 8). They won't have the ability to update documentation, add a new office, add a new contact, and move / reassign offices.

# IPA Portal

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***

Firm Status:  
**Active**  
[update documentation](#)

**Back to Home**

**Add a New Office**

**Add a New Contact**

**Move / Reassign Offices**

John Doe  
614-555-5555  
ABC.Auditor@aol.com

edit

123 Main Street  
Mytown, OH 12345

edit

5678 Oak St  
Mytown, OH 12345

edit

Jane Jones  
614-555-4444  
ABC.Auditor@aol.com

edit

789 Elm Street  
Anytown, OH 54321

edit

To update this information, click [edit](#)

Figure 7

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***

Firm Status:  
**Active**

**Back to Home**

Jane Jones  
614-555-4444  
ABC.Auditor@aol.com

edit

789 Elm Street  
Anytown, OH 54321

edit

To update this information, click [edit](#)

Figure 8

# IPA Portal

## Update Documentation

**DAVE YOST**  
OHIO AUDITOR


**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***

Firm Status:  
**Active**


 [update documentation](#)

Back to Home

Add a New Office

Add a New Contact

Move / Reassign Offices

John Doe  
614-555-5555  
ABC.Auditor@aol.com


edit

123 Main Street  
Mytown, OH 12345

edit

5678 Oak St  
Mytown, OH 12345

edit

Jane Jones  
614-555-4444  
ABC.Auditor@aol.com

edit

789 Elm Street  
Anytown, OH 54321

edit

**Update Documentation**

Note: All documents attached MUST be in PDF format

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

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

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

Is this an MBE/EDGE Firm?:  
☐ Yes ☒ No

Are you interested in Performance Audits?:  
☐ Yes ☒ No

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.

Figure 9

# IPA Portal

## Add a New Office

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***

Firm Status:  
**Active**  
[update documentation](#)

**Back to Home**

**Add a New Office** ★

**Add a New Contact**

**Move / Reassign Offices**

John Doe  
614-555-5555  
ABC.Auditor@aol.com

[edit](#)

123 Main Street  
Mytown, OH 12345

[edit](#)

5678 Oak St  
Mytown, OH 12345

[edit](#)

Jane Jones  
614-555-4444  
ABC.Auditor@aol.com

[edit](#)

789 Elm Street  
Anytown, OH 54321

[edit](#)

**Add Office**

Note: In order to add a new office with a new contact person, the new contact person must be added first. Please click the "Add a New Contact" button to the left.

Contact: John Doe

Address:

City, State Zip: OH

Number of Professional Staff in this office with requisite Governmental Continuing Professional Education training as dictated by Government Auditing Standards:

Partners:

Managers:

In Charge/Seniors:

Assistants:

Cancel

Save

The Auditor of State's office will permit one contact person to be assigned to multiple offices; however, each office may only have one contact person.

In order to completely delete any contact person or office, please email [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) to have your firm's account updated.

Figure 10

6

# IPA Portal

## Add a New Contact

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)


**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***


Firm Status:  
**Active**  
[update documentation](#)

**Back to Home**

**Add a New Office**


**Add a New Contact** 

**Move / Reassign Offices**

John Doe  
614-555-5555   
ABC.Auditor@aol.com  
[edit](#)

123 Main Street  
Mytown, OH 12345  
[edit](#)

5678 Oak St  
Mytown, OH 12345  
[edit](#)

Jane Jones  
614-555-4444   
ABC.Auditor@aol.com  
[edit](#)

789 Elm Street  
Anytown, OH 54321  
[edit](#)

**Add Contact**

First Name:

Last Name:

Title:

Phone:

Email:

**Cancel** **Save**

The Auditor of State's office will permit one contact person to be assigned to multiple offices; however, each office may only have one contact person.

In order to completely delete any contact person or office, please email [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) to have your firm's account updated.

Figure 11

7



# IPA Portal

## Move / Reassign Offices

**DAVE YOST**  
OHIO AUDITOR

**IPA Portal**

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

**Edit Firm Information**

**ABC Auditors, Inc. - \*Test\***

Firm Status:  
**Active**  
[update documentation](#)

**Back to Home**

**Add a New Office**

**Add a New Contact**

**Move / Reassign Offices** ★

John Doe  
614-555-5555  
ABC.Auditor@aol.com  
[edit](#)

123 Main Street  
Mytown, OH 12345  
[edit](#)

5678 Oak St  
Mytown, OH 12345  
[edit](#)

Jane Jones  
614-555-4444  
ABC.Auditor@aol.com  
[edit](#)

789 Elm Street  
Anytown, OH 54321  
[edit](#)

**Move / Reassign Offices**

Note: As the primary contact, your firm's designated primary office is assigned to you and can only be reassigned by contacting the AOS at [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov)

In order to change the designated contact person for any other existing office, place your cursor on the office that you want to move, then left click and hold while you drag and drop the office into the box for the selected contact person. After all changes have been made, click the "Save Changes" button to update your firm's account.

If you need to add a new contact person and/or office for your firm, please click the "Add a New Contact" or "Add a New Office" buttons to the left.

John Doe

123 Main Street  
Mytown, OH 12345

5678 Oak St  
Mytown, OH 12345

Jane Jones

789 Elm Street  
Anytown, OH 54321

**Cancel**

**Save Changes**

The Auditor of State's office will permit one contact person to be assigned to multiple offices; however, each office may only have one contact person.

In order to completely delete any contact person or office, please email [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) to have your firm's account updated.

Figure 12

8

# IPA Portal

## Scores & Report Status

Click on Scores & Report Status block (figure 2) to access your firm's scores and currently contracted reports 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.

The screenshot shows the 'Scores & Report Status' page of the IPA Portal. The page has a header with 'DAVE YOST OHIO AUDITOR' and 'IPA Portal'. Below the header is a 'Scores & Report Status' section with a 'Back to Home' button. There are two tabs: 'Scores' (selected) and 'Awarded Contracts'. The 'Scores' tab displays a 'Scores' section with the following data:

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%

Annotations on the right side of the screenshot:

- ★ Scores
- Overall firm scores (points to the Scores section)
- Click here to view the individual engagement scores (points to the 'View Projects Used for Scores' button)
- Click here to view the individual engagements included in the backlog score (points to the 'View Projects used for Backlog' button)

Figure 13

The screenshot shows the 'Scores & Report Status' page of the IPA Portal. The page has a header with 'DAVE YOST OHIO AUDITOR' and 'IPA Portal'. Below the header is a 'Scores & Report Status' section with a 'Back to Home' button. There are two tabs: 'Scores' and 'Awarded Contracts' (selected). The 'Awarded Contracts' tab displays two buttons: 'View Awarded Contracts by Due Date' and 'View Awarded Contracts by Customer'. Below these buttons are two tables with the following columns:

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by QA	Date Returned
----------------	---------------	-------------	----------	---------------------	---------------

Annotations on the right side of the screenshot:

- ★ Awarded Contracts
- Click here to view your firm's currently contracted reports by due date (points to the 'View Awarded Contracts by Due Date' button)
- Click here to view your firm's currently contracted reports by customer (points to the 'View Awarded Contracts by Customer' button)

Figure 14

# IPA Portal

## View Client Detail and AFDRS Filings

To access client contact information and view financial data filings with the Annual Financial Data Report System (AFDRS) select **View Client Detail and AFDRS Filings** (figure 2)

### Client Listing

The Client Listing (figure 15) 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.

DAVE YOST OHIO AUDITOR IPA Portal		
<a href="#">Home</a>	<a href="#">Request Bids</a>	<a href="#">View Requests</a>
<a href="#">Update Firm</a>	<a href="#">Scores/Report Status</a>	<a href="#">View Client Detail and AFDRS Filings</a>
Client Listing		
Client ID	Client Name	County
32D79	<a href="#">Anderson Township</a>	Hamilton
06B29	<a href="#">City Of Beavercreek</a>	Greene
06B98	<a href="#">City Of Dayton</a>	Montgomery
06B31	<a href="#">City Of Fairborn</a>	Greene
06C00	<a href="#">City Of Huber Heights</a>	Montgomery
06C01	<a href="#">City Of Kettering</a>	Montgomery
06C46	<a href="#">City Of Mason</a>	Warren
06C02	<a href="#">City Of Miamisburg</a>	Montgomery
06C54	<a href="#">City Of Rossford</a>	Wood
06B41	<a href="#">City Of Sharonville</a>	Hamilton
06C08	<a href="#">City Of Vandalia</a>	Montgomery

Figure 15

### Customer Detail

Customer Detail will provide the contact information as known to the Auditor of State and access to the annual financial data filings in AFDRS. If the contact information is out of date and requires changes, please click on **Request 'BILL TO' Address Change**. (figure 16) This will bring up a **Request Customer Address Change Screen** (figure 17). AFDRS Data will include the financial data inputted into the system by the client and, if applicable, a PDF file of the unaudited financial statement compilation.

**Note:** To access the AFDRS Data Viewer (figure 18), click on the applicable year under the **Years** column of the AFDRS Data table (figure 16).

**Note:** To access the unaudited financial statement compilation, click on the file name for the applicable year located in the "FS Upload" column. (figure 16) The PDF document which the client has filed will open and can be saved. The full financial statement upload is a new requirement for years ended after December 31, 2014 beginning with cities and counties. Libraries, townships and villages filings with AFDRS for the year ended December 31, 2014 were not required to include a PDF file. Future filings by all clients with a filing requirement will require a PDF of the unaudited financial statement compilation (i.e. Schools, educational service centers and community schools for fiscal year ending June 30, 2015; Libraries, townships and villages for year ending December 31, 2015; and All other clients with years ending in FY 15.)

# IPA Portal

**DAVE YOST**  
OHIO AUDITOR

IPA Portal

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

Customer Detail

Customer Information

Cust Number: 06C01  
Cust Name: City Of Kettering  
Cust Type: City  
Region: West  
County: Montgomery  
  
UAN Number:  
UAN Active: No  
  
[Request 'BILL TO' Address Change](#)

AFDRS Data:

Filing ID	Years	Status	Filing Type	Due Date	Filed Date	FS Upload
155	2013	Submitted	GAAP	5/30/2014	3/19/2014	
12961	2014	Submitted	GAAP	6/1/2015	3/23/2015	<a href="#">06C01_2014.pdf</a>

Addresses

Address Type ID:  
**BILL TO**

Please contact [IPACorrespondence@ohioauditor.gov](mailto:IPACorrespondence@ohioauditor.gov) if you:  
Forgot your login ID.  
Are otherwise unable to access your account.  
Are having difficulty updating your account information.  
Have other questions about your account.

Figure 16

**DAVE YOST**  
OHIO AUDITOR

IPA Portal

[Home](#) [Request Bids](#) [View Requests](#) [Update Firm](#) [Scores/Report Status](#) [View Client Detail and AFDRS Filings](#)

Request Customer Address Change

Customer Name: City Of Kettering  
Customer Number: 06C01  
Customer Type: City  
Region: West  
Address Type:

Current Address

Contact Name:  
Address Line 1:  
Address Line 2:  
Address Line 3:  
City:  
State:  
Zip:  
County:  
Phone:  
Fax:  
Email:

Updated Address

Contact Name:  
Address Line 1:  
Address Line 2:  
Address Line 3:  
City:  
State:  
Zip:  
County:  
Phone:  
Fax:  
Email:  
Reason:

Figure 17

# IPA Portal

## AFDRS Data Viewer

The AFDRS Data viewer 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

AFDRS Data Viewer	
City Of Kettering 06C01 - (2014 - GAAP)	
<a href="#">Export to Excel</a>	
Statement Of Net Position - Governmental Activities	Filed Amount (Unaudited)
<b>- Assets -</b>	
Cash And Cash Equivalents	\$0.00
Investments	\$106,472,510.00
Inventory Held For Resale	\$0.00
Materials And Supplies Inventory	\$781,019.00
Accrued Interest Receivable	\$759,246.00
Accounts Receivable	\$694,126.00
Internal Balances	\$0.00
Intergovernmental Receivable	\$0.00
Prepaid Items	\$54,713.00
Income Tax Receivable	\$8,916,700.00
Property Taxes Receivable	\$8,019,368.00
Special Assessments Receivable	\$790,000.00
Revenue In Lieu Of Taxes Receivable	\$0.00
Due From Other Governments	\$2,063,420.00
Notes Receivable	\$0.00
Loans Receivable	\$826,731.00
Investment In Joint Venture	\$0.00
Restricted Assets	\$0.00
Advances To Other Funds	\$0.00
Nondepreciable Capital Assets	\$13,254,293.00
Depreciable Capital Assets	\$280,631,204.00
Less Accumulated Depreciation	(\$134,901,414.00)
Other Assets	\$0.00
<b>* Total Assets *</b>	<b>\$288,361,916.00</b>
Total Deferred Outflows Of Resources	\$0.00
<b>- Liabilities -</b>	
Accounts Payable	\$2,978,653.00
Accrued Wages And Benefits	\$1,957,184.00
Contracts Payable	\$0.00
Intergovernmental Payable	\$0.00
Due To Other Governments	\$0.00
Matured Compensated Absences	\$0.00
Matured Interest Payable	\$0.00
Matured Bonds Payable	\$0.00

Figure 18