

IPA Portal

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

The screenshot shows the 'Login' page of the IPA Portal. At the top left, it says 'DAVE YOST OHIO AUDITOR IPA Portal'. Below this is a 'Login' header. On the left side, there is a grey box with the text: 'Please contact IPACorrespondence@ohioauditor.gov if you:' followed by a bulleted list: '• 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 the list is a link: 'Quick Guide - IPA Portal'. On the right side, there is a login form with two input fields: 'Username:' and 'Password:'. The 'Username' field has an asterisk. Below the 'Password' field is a 'Login' button and a link: 'forgot password'.

Figure 1

The following webpage will open.

The screenshot shows the 'Home' page of the IPA Portal. At the top left, it says 'DAVE YOST OHIO AUDITOR IPA Portal'. Below this is a 'Home' header. On the left side, there is a profile card for 'ABC Auditors, Inc. - *Test*'. The card contains the following information: 'Primary Contact: John Doe', 'Firm Status: Active', 'Firm Tier: 1', 'Last Peer Review Date: 12/31/2014', and 'MBE/EDGE Expiration: 12/31/2014'. Below the profile card is a 'Logged in As:' section with the following information: 'John Doe', 'ABC.Auditor@aol.com', and '614-555-5555'. Below the 'Logged in As:' section are two address blocks: '123 Main Street, Mytown, OH 12345' and '5678 Oak St, Mytown, OH 12345'. On the right side, there are four blue buttons: 'Request Contract Bids', 'View Bid Requests', 'Update Firm Information, Contacts, & Offices', and 'Scores & Report Status'. At the bottom of the page, there is a footer with the text: 'Please contact IPACorrespondence@ohioauditor.gov if you:' followed by a bulleted list: '• 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.'

Figure 2

IPA Portal

Requesting Contract Bids

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

Dave Yost Ohio Auditor of State
Back to ohioauditor.gov

IPA Portal
IPA Bid List
[Back to Home](#)

Please select which office you are submitting requests for:

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	8/21/2013	14AAC-EBBE4	Solid Waste Authority Of Cent Ohio	1/1/2013 - 12/31/2017	2		Franklin	GASB-34, Single Audit, CAFR	5	Annual	<input type="checkbox"/>
Central	9/4/2013	E4B76-QAD59	City Of Upper Arlington / Upper Arlington Community Improvement Corporation (pool of 2)	1/1/2013 - 12/31/2016	2						<input type="checkbox"/>

Figure 3

★ **Step 1:**

Select which office you are submitting requests for

★ **Step 2:**

Check all jobs for which you are submitting requests 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

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.

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Contracts for Bid Request
E4B76-QAD59 - City Of Upper Arlington / Upper Arlington Community Improvement Corporation

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*

5678 Oak St
Mytown OH 12345

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

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.

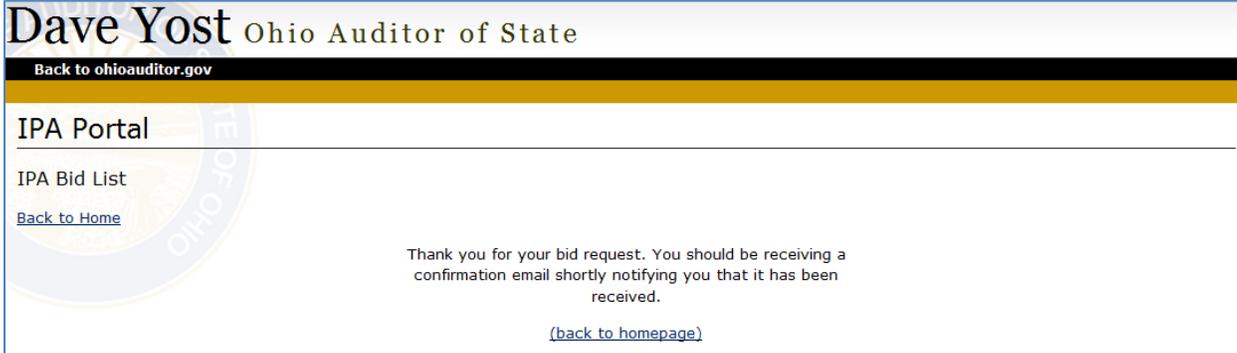


Figure 5

Viewing Bid Requests

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

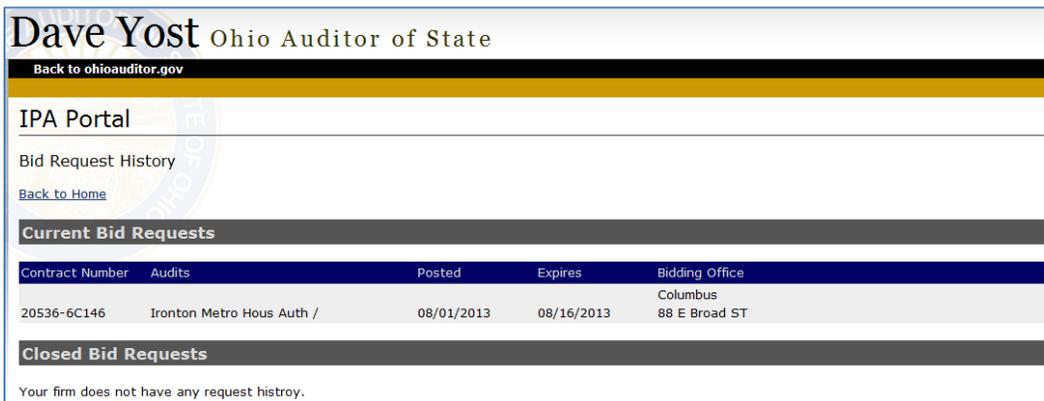


Figure 6

Update Firm Information, Contacts, & Offices

Click on the **Update Firm Information, Contacts, & Offices** block (see 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 (see 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 (see 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 of State

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IPA Portal

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

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

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

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

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

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

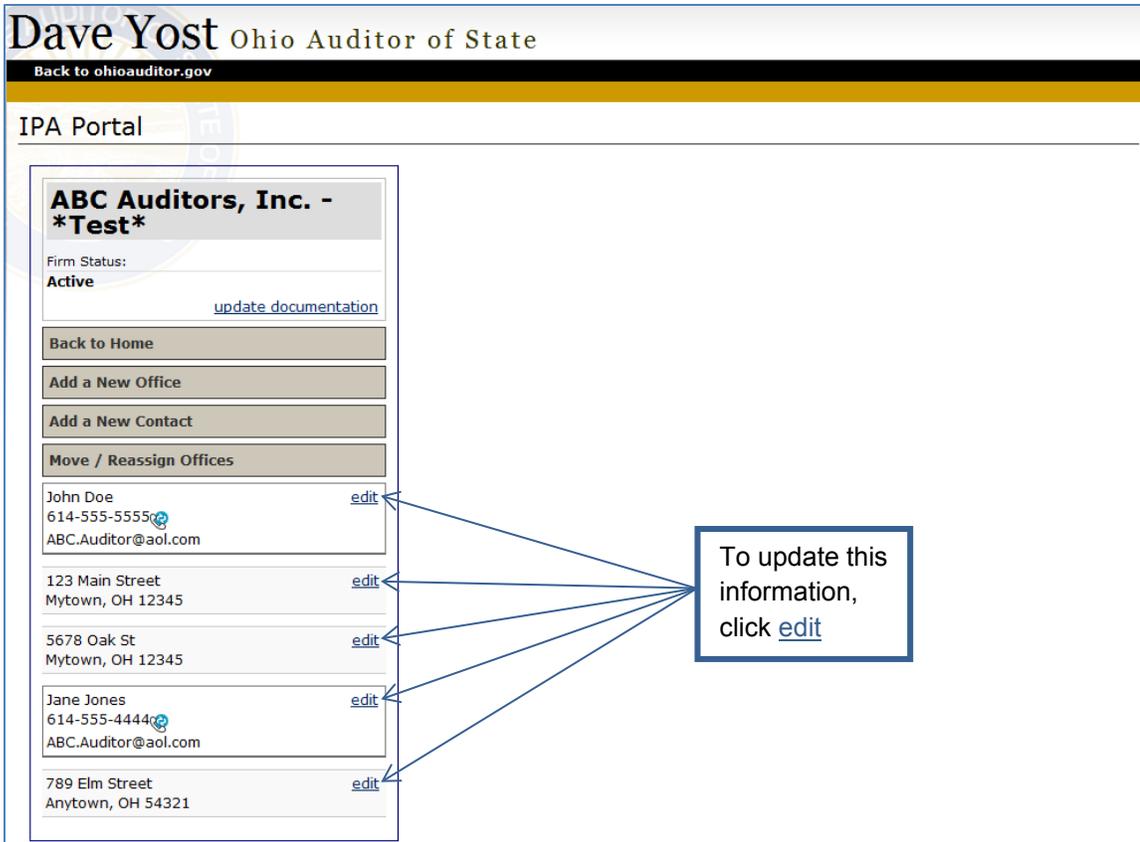


Figure 7

Dave Yost Ohio Auditor of State

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IPA Portal

ABC Auditors, Inc. - *Test*

Firm Status:
Active

Back to Home

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

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

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

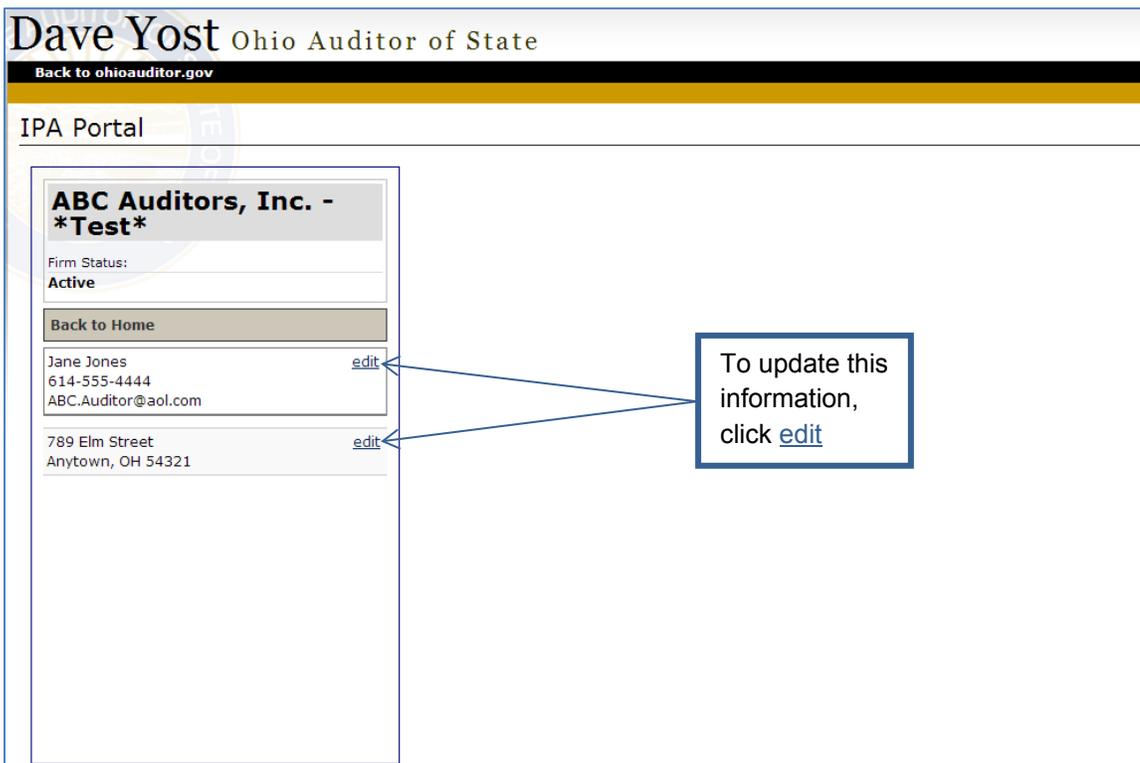


Figure 8

Update Documentation

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IPA Portal

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 [edit](#)
ABC.Auditor@aol.com

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

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

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

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: [Browse...](#)

The firm's policy on auditor independence specific to Government Auditing Standards: [Browse...](#)

A copy of the firm's most recent external quality control review (Government Auditing Standards): [Browse...](#)

If an MBE/EDGE firm, attach a copy of related Ohio DAS Certification: [Browse...](#)

Are you interested in Performance Audits?:
 Yes No

[Cancel](#) [Save](#)

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

Add a New Office

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IPA Portal

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 [edit](#)
ABC.Auditor@aol.com

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

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

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

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:

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 to have your firm's account updated.

Figure 10

Add a New Contact

Dave Yost Ohio Auditor of State

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IPA Portal

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

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

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

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

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

Add Contact

First Name:

Last Name:

Title:

Phone:

Email:

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 to have your firm's account updated.

Figure 11

Move / Reassign Offices

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IPA Portal

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

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

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

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

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

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

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

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 to have your firm's account updated.

Figure 12

IPA Portal

Scores & Report Status

Click on Scores & Report Status block (see 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 in the IPA Portal. The page header includes 'DAVE YOST OHIO AUDITOR IPA Portal'. A 'Back to Home' button is visible. The 'Scores' tab is selected, and the 'Awards Contracts' sub-tab is active. The 'Scores' section displays 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%

Callouts on the right side of the screenshot:

- Overall firm scores (points to the Scores summary table)
- 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 in the IPA Portal. The page header includes 'DAVE YOST OHIO AUDITOR IPA Portal'. A 'Back to Home' button is visible. The 'Awards Contracts' tab is selected, and the 'Scores' sub-tab is active. The 'View Awarded Contracts by Due Date' button is highlighted. Below it, a table header is shown:

Project Number	Customer Name	Fiscal Year	Due Date	Date Received by QA	Date Returned
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Callouts on the right side of the screenshot:

- 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