



# IPA Registration Quick Guide

All independent public accounting (IPA) firms interested in expressing interest to bid on financial audits must register online and be approved by the Auditor of State's office.

Please note: IPA firm registration must be entered by a representative equivalent to a partner level for the firm.

To register with the Auditor of State's office, [CLICK HERE](#) and select **Register Now**. The following webpage will open (Figure 1).

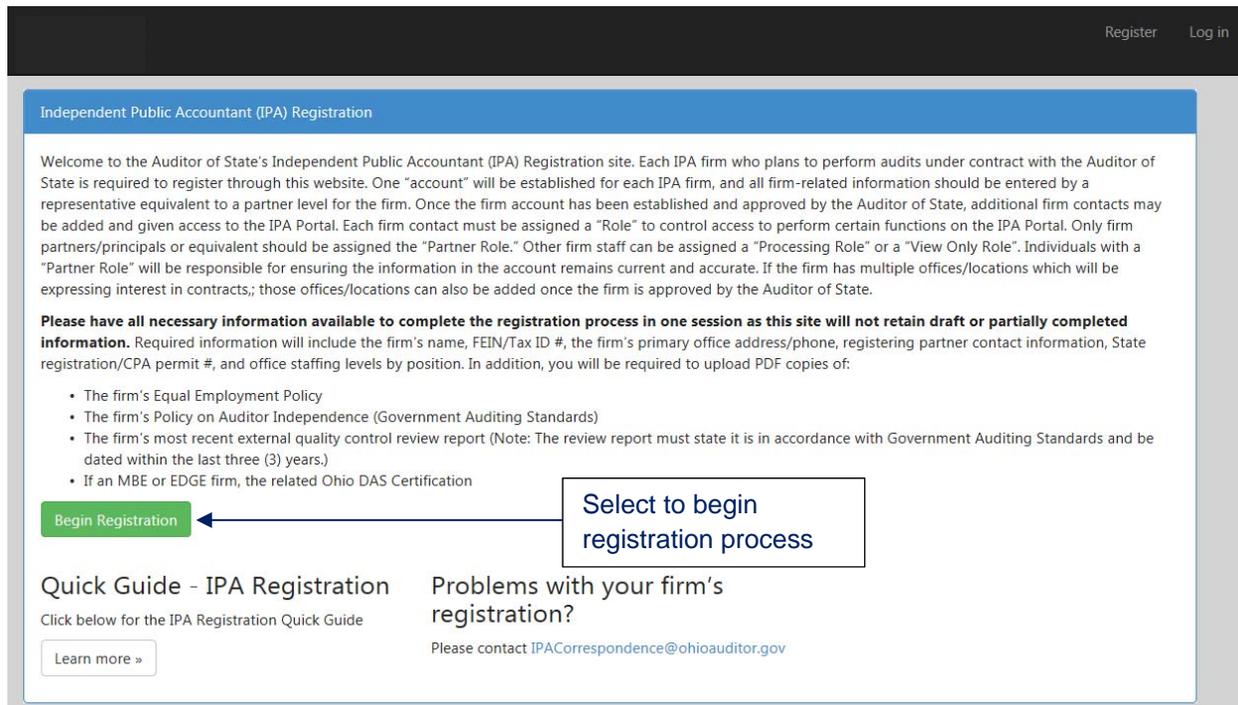


Figure 1

After reading the instructions, click the **Begin Registration** button. The following webpage will open (Figure 2).



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Enter your firm's information (Figure 2). The Firm Name will be the official firm name used on all documents/correspondence created through the IPA Portal.

Independent Public Accountant (IPA) Registration

### Firm Information

Do you have an office with an Ohio presence?:  Yes  No

Firm Name:

Firm Type:

Firm FEIN or Tax ID:

State Registration #:

State of registration:

Is this an MBE/EDGE Firm?:  Yes  No

Cancel Next

Complete all fields prior to selecting Next to move on to the subsequent screen (Figure3)

Ensure Firm Name is accurate.

Figure 2

Once all Firm Information has been entered, select the **Next** button and the following webpage will open (Figure 3).

Independent Public Accountant (IPA) Registration

### Registering Partner Information

First Name:

Last Name:

Title:

Email:

Phone Number:

User Name:

Password:

Confirm password:

Cancel Back Next

Create a User Name and password. Password must be at least six (6) characters long.

Figure 3

Once Registering Partner Information has been entered, select the **Next** button and the following webpage will open (Figure 4).



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Register Log in

Independent Public Accountant (IPA) Registration

**Ohio Office Information**

**Address:**

**Address2:**

**City:**

**State:** Ohio

**Zip Code:**

**Partners:**

**Managers:**

**In Charge/Seniors:**

**Assistants:**

Cancel Back **Finish Initial Registration**

You must register your Ohio office. Additional office locations may be added to the IPA Portal after the firm is registered and AOS approved is received.

Staffing amounts must be entered.

Figure 4



Select the **Finish Initial Registration** button. The following webpage will open (Figure 5).

IPA Home Update Firm

**IPA Account Registration**

Your firm's initial IPA Portal account has been created. Note: The registration process is NOT complete. You will be required to upload PDF copies of:

- The firm's Equal Employment Policy
- The firm's Policy on Auditor Independence (Government Auditing Standards)
- The firm's most recent external quality control review report (Note: the review report must state it is in accordance with Government Auditing Standards and be dated within the last three (3) years)
- If an MBE or EDGE firm, the related Ohio DAS Certification.

These documents will be reviewed prior to approval by the Auditor of State

Select "Go to IPA application" to log in to the IPA Portal.

**Go to IPA application**

Figure 5



Select the **Go to IPA application** button to log in to the IPA Portal.



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The following webpage will open (Figure 6).

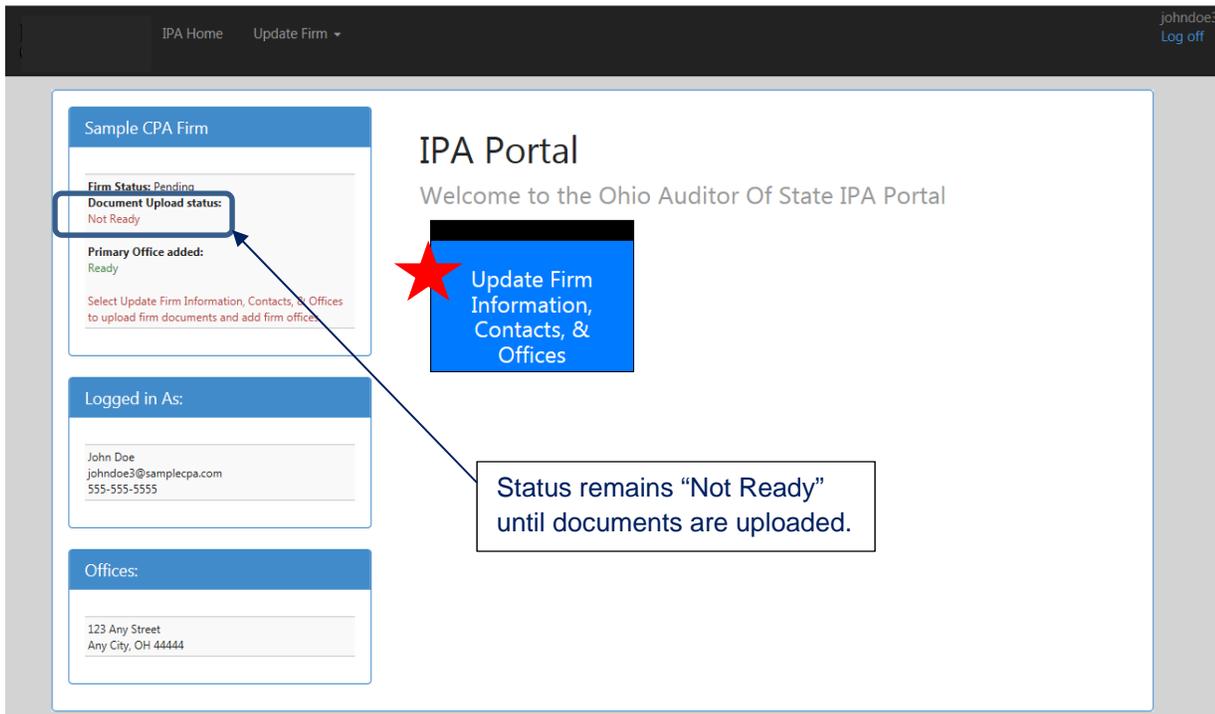


Figure 6

★ Click the **Update Firm Information, Contacts, & Offices** block (Figure 6). The following webpage (Figure 7) will open.

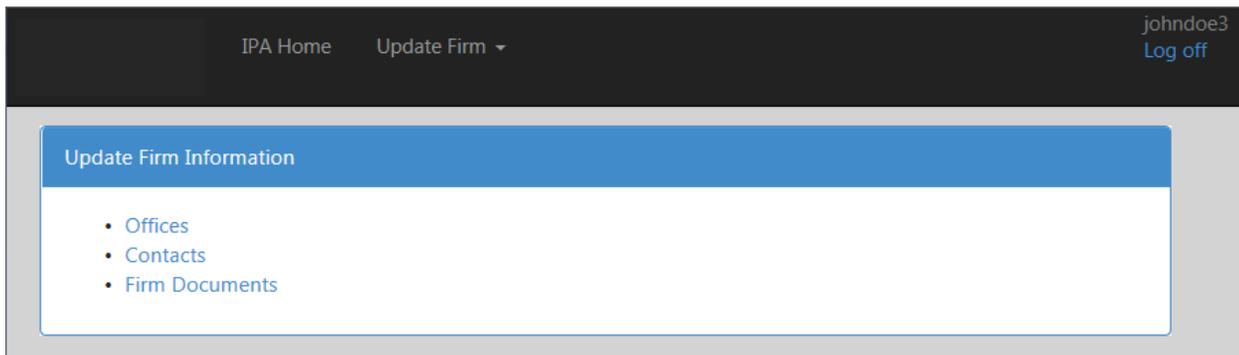


Figure 7

Note: Additional offices and firm contacts may be added once the firm has registered and AOS approval is received. Refer to the [Guide to the IPA Portal](#) for guidance.



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## Upload Firm Documents

Select the **Firm Documents** link (Figure 7). The following webpage (Figure 8) will open. Documentation that must be uploaded are: Equal Employment Policy, GAGAS Policy on Auditor Independence, and GAGAS Peer Review Report. Uploading a MBE/EDGE certificate is required only for those firms who are MBE/EDGE certified.

IPA Home Update Firm ▾

**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
There is currently no external quality control review 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 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"/>

Once all firm documents have been uploaded, select IPA Home to finalize firm registration.  
 Note: Changes submitted on this Update Documentation page must be reviewed and accepted by the AOS; therefore, changes will firm's account.

Figure 8

To upload a new document, 1) select Browse to locate the file and 2) select Upload. "File was uploaded" will be reflected at the top of screen for successful uploads. The file will be reflected as "Pending" until reviewed and accepted by AOS. (Figure 9)

A "remove" option will be available until the document is accepted by AOS. (Figure 9)

IPA Home Update Firm ▾

**Firm Documents**

File was uploaded. ✕

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	
Pending	test EEO.pdf		11/9/2015 1:34:14 PM	Remove

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

Status	File Name	Added By	Added Date	
Pending	test independence.pdf		11/9/2015 1:35:42 PM	Remove

**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 report.pdf	johndoe3	11/9/2015 1:35:55 PM	Remove

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

Status	File Name	Added By	Added Date	
Pending	test mbe.pdf	johndoe3	11/9/2015 1:36:31 PM	Remove

Once all firm documents have been uploaded, select IPA Home to finalize firm registration.  
 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 Registration Quick Guide

After all required documents have been uploaded, the Document Upload status will reflect “Ready” (Figure 10).

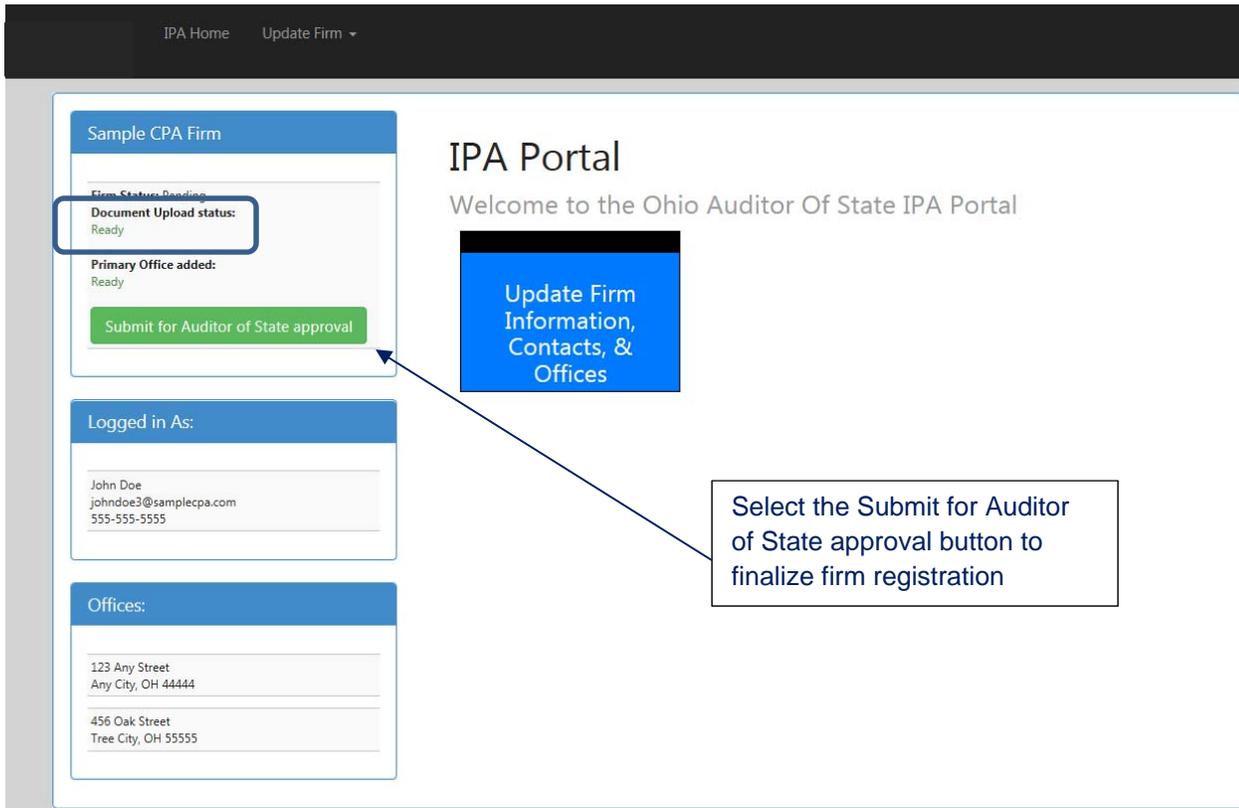


Figure 10

The notice “Your firm has been submitted for approval. You will not be able to log onto the IPA application again until you have been approved” will be reflected (Figure 11).

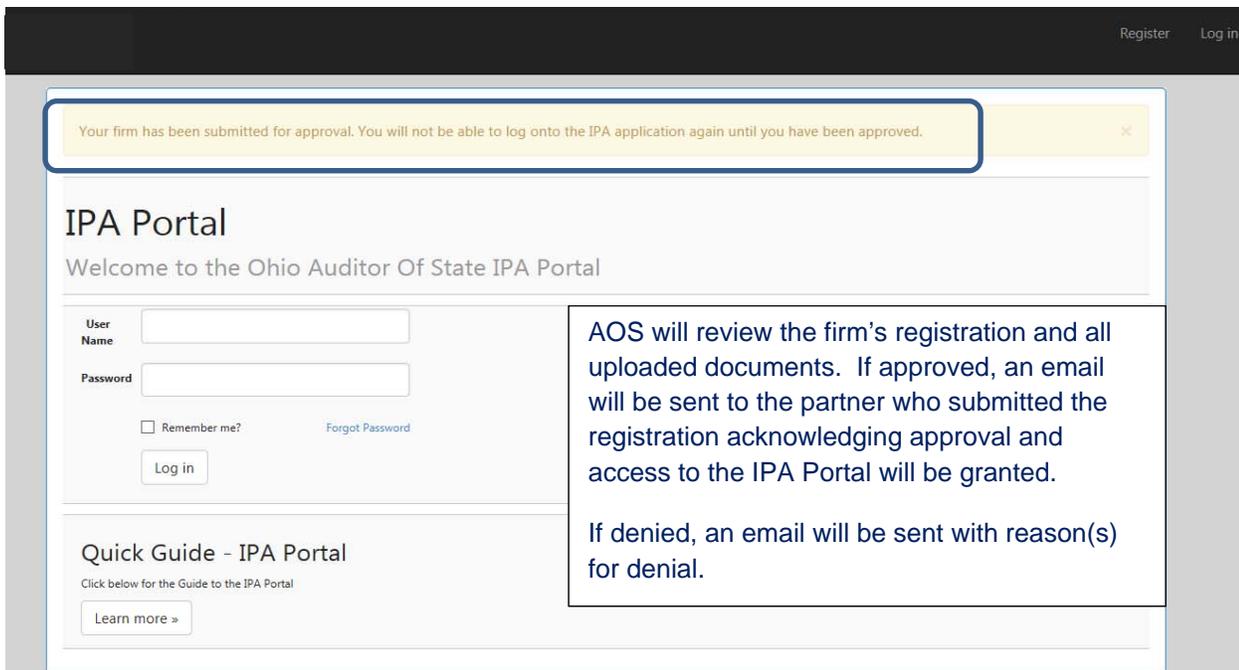


Figure 11