

Texas Education Agency Login (TEAL)

Request for Access: **Primary Approver in TEAL** for **Certified Public Accountants (CPA)**

Section 1: Process information

To request access to the AUDIT 2.0 application, a partner/resident manager (RM) of a CPA firm must first complete and submit this form before anyone from the firm can apply for the CPA Personnel role in AUDIT 2.0. The purpose of this form is to set up the CPA firm as an Organization and designate the CPA partner/RM with the Legal Authority role in the TEA Business Partner Directory (BPD).

Because of the serious consequences that can result from inappropriate access to sensitive and confidential data, access approval is granted to the organization head. The partner/resident manager of the CPA firm is recorded as the Legal Authority in TEA's internal Business Partner Directory (BPD) and granted access as the Primary Approver in TEAL. The Primary Approver reviews and, when appropriate, approves requests for access to TEA applications submitted by other users in their organization. Requests are submitted and reviewed online in TEAL. Once a Primary Approver for a CPA firm is set up in TEAL, the CPA Personnel role can be requested online. The Primary Approver can also request the CPA Personnel role in AUDIT 2.0.

Additional information can be found on the following web pages:

- [TEA Secure Applications Information](#)
- [Overview of the TEAL Application - TEAL Help](#)
- [Approving TEAL Access for Your Staff](#)
- [TEAL Login \(TEAL\) with Request New User Account](#)

AUDIT CPA Personnel user role approval process:

Please note that it may take a few days to complete the entire process.

1. If not already done so, a partner/RM of a CPA firm applies for and obtains a TEAL account at <https://tealprod.tea.state.tx.us>. Click on the "Request New User Account" in the gray box to complete the online application. Once processed, you will receive a username and password.
2. A partner/RM of the CPA firm emails this completed "*Request for Access: Primary Approver in TEAL for Certified Public Accountants*" form to the Financial Compliance Division at CPAFirmTEALRequest@tea.texas.gov.
3. After the CPA partner/RM receives an email that the "*Request for Access: Primary Approver in TEAL for Certified Public Accountants*" form has been processed and their *Organization* and *Legal Authority* role have been set up in the Business Partner Directory (BPD), they will now be able to submit a request for the **Primary Approver role** of their CPA firm by referring to the "Request Rights to Approve" instructions in the [TEAL Quick Reference for Organization Approvers \(BPD\)](#) pdf found under the [Approving TEAL Access for Your Staff](#) webpage.
4. After the CPA partner/RM receives an email that their *Primary Approver* role has been approved, they can apply for **CPA Personnel role** access in the AUDIT 2.0 Application by logging into their TEAL account and following the steps provided in the email. They can now also approve **CPA Personnel role** requests for others in their organization.
5. Once approved by the Primary Approver, the *CPA Personnel role* request is routed to each of the school districts' approvers separately. If the CPA requestor is also the Primary Approver of the CPA firm, the request is routed directly to the school districts' approver(s).
6. Once approved at the school district level, the request is sent to the TEA application service approver.
7. The CPA requestor will receive notification from TEAL of approval for each AUDIT 2.0 application request.

Section 2: Primary Approver for CPA firm information

* = Required Information

* CPA Firm Partner/Resident Manager's First Name

* Last Name

* CPA Firm Partner/Resident Manager's Email Address

* Firm Name

* Firm License ID issued by the Texas State Board of Public Accountancy

* Firm Address

* City

* Zip Code

* Phone Number

CPA Firm Website URL

* CPA Firm Partner/Resident Manager's Signature

* Date

Section 3: Email completed form to CPAFirmTEALRequest@tea.texas.gov

For assistance please contact:

Laura Cavazos at 512-463-8976 or Laura.Cavazos@tea.texas.gov

Paul Moreno at 512-475-2228 or Paul.Moreno@tea.texas.gov

Texas Education Agency
School Finance Department | Financial Compliance Division
Phone: 512-463-9095

Section 4: *This section to be completed by TEA Financial Compliance Administrator*

☐ CPA firm licensed by Texas State Board of Public Accountancy

TEA Business Partner Directory Administrator

* Date