

Instructions for Setting Up Audit 2.0 Application Access for CPAs in TEAL

To request access to the Audit 2.0 application, a partner/resident manager (RM) of a CPA firm must first complete and submit the Request for Access: Primary Approver in TEAL for Certified Public Accountants (CPAs) form before anyone from the firm can apply for the CPA role in the Audit 2.0 application. Once a primary approver for a CPA firm has been set up in TEAL, the CPA personnel role can be requested by others in the firm. The primary approver can also request the CPA role in the Audit 2.0 application for themselves.

Section A provides instructions for setting up a primary approver and obtaining access to the Audit 2.0 application. If the primary approver does not wish to obtain access to the Audit 2.0 application, he or she should stop after completing step III.

Section B provides instructions on obtaining access to the Audit 2.0 application for other members of a CPA firm after the primary approver has been given access to the Audit 2.0 application.

IMPORTANT NOTE:

CPA Personnel role will be linked to each school the firm works. Individuals requesting CPA Personnel access should reach out to their contact at each of the schools you will be submitting documents for and let them know that the superintendent will be receiving your Audit 2.0 application CPA's request. Each superintendent has five (5) days to approve your request before it will expire.

A. Audit 2.0 Application: CPA Primary Approver

I. Submission of CPA Primary Approver Form

1. A partner/resident manager of the CPA firm submits a completed Request for Access: Primary Approver in TEAL for Certified Public Accountants (CPA) form to the Financial Compliance Division.
2. A representative of the Financial Compliance Division will email the applicant after the CPA form has been processed.

II. Requesting a TEAL Account

If you do not already have access to TEAL, you must request a TEAL user ID.

1. Go to the TEAL page using the link located on the blue header bar of the TEA website (<https://tea.texas.gov/Home/>).
2. Click on Request New User Account. The user registration page appears.
3. Complete the user information. The following fields are required: First Name, Last Name, Email Address, Verify Email, Birth Month, Birth Day, and Organization Type. Use the Tab key to move from one box to the next.
 - a. Type your first, last, and, if you wish, middle name.
 - b. Type any applicable suffix, such as Jr. or an academic or professional suffix.
 - c. Type your email address. This address will receive all notification emails, including the user access information that you need to log on.
 - d. Retype your email address to verify that it is correct.

Note: Do not use a group email address. The address you enter here will receive confidential information for accessing TEA applications. Using a group email address could compromise security for your organization's confidential data.

- e. Type your birth month and day. This information is used internally to help distinguish you from other users with the same first and last name. It is not used for any other purpose.
- f. Type your birth year.
- g. Select the organization type: Other.
- h. Type your job title.
- i. Type your phone number, including area code.
- j. Type your mailing address.
- k. Check the information you provided to make sure it is correct.
- l. Click Submit.
- m. A message appears acknowledging your request. Click Done. The page redirects to the TEAL page.

Next Steps

Once you have received your TEAL account information, you can request to be the TEAL primary approver for your CPA firm after a representative from the Financial Compliance Division has emailed your CPA firm name listing and organization number to you.

III. Requesting to be a TEAL Primary Approver for Your CPA Firm after you have submitted the CPA Form and have received an approval email

- 1. Log on to TEAL (<https://pryor.tea.state.tx.us>)
- 2. On the Self Service menu, select Edit My User Information.
- 3. Near the bottom of your TEAL profile, click the Manage Approver Status link.
- 4. Select Request Approver Status.
- 5. From the drop-down menu, select the Primary Approver.
- 6. In the field for Organizations, enter the organization name or 6-digit ID number (without dashes) that you received in the email from the Financial Compliance Division.
- 7. When you finish entering all information, click Submit. A message should be displayed indicating that your request was successfully submitted.

IV. Requesting access to the Audit 2.0 application

Once you have been set up as the primary approver in TEAL, you can request access to the Audit 2.0 application.

- 1. Log on to TEAL using your user name and password. The home page appears. If you have not been granted access to any applications yet, there will be no links under Applications. You also can select My Application Accounts on the Self Service menu.
- 2. Click Apply for Access.
- 3. Click Request New Account.
- 4. Click the link for Audit 2.0, or double-click the application name.
- 5. When a page appears, click Add Access.

6. Under the Employing Organization section, for the Organization field, type the name of your organization or number. Select your CPA firm from the organizations listed. This is the name of your CPA firm and the six-digit number which you received from TEA after you submitted the *Request for Access: Primary Approver in TEAL for Certified Public Accountants (CPA)* form. For the CPA Personnel Role, DO NOT enter the name of the school as your Employing Organization.
7. Select the CPA Personnel role.
8. Under the County District Numbers field, type the list of schools you work with using the county district numbers (without dashes), separated by commas and without spaces.
9. Type in your six-digit organization number (same as in step 6 above) for your CPA firm under the License ID field, if it is not already displayed.
10. Click Done.
11. Click Save Changes. If the request was submitted successfully, a success message appears at the top of the tab.

Note: Other members of your firm may also obtain access to the Audit 2.0 application in TEAL by following the instructions in section B. They will need your CPA firm's organization name and 6-digit ID number that was emailed to you during the setup process.

B. Audit 2.0 Application: For Other Members of a CPA Firm

I. Requesting a TEAL Account

If you do not already have access to TEAL, you must request a TEAL user ID.

1. Go to the TEAL page using the link located on the blue header bar of the TEA website (<https://tea.texas.gov/Home/>).
2. Click on Request New User Account. The user registration page appears.
3. Complete the user information. The following fields are required: First Name, Last Name, Email Address, Verify Email, Birth Month, Birth Day, and Organization Type. Use the Tab key to move from one box to the next.
 - a. Type your first, last, and, if you wish, middle name.
 - b. Type any applicable suffix, such as Jr. or an academic or professional suffix.
 - c. Type your email address. This address will receive all notification emails, including the user access information that you need to log on.
 - d. Retype your email address to verify that it is correct.

Note: Do not use a group email address. The address you enter here will receive confidential information for accessing TEA applications. Using a group email address could compromise security for your organization's confidential data.

- e. Type your birth month and day. This information is used internally to help distinguish you from other users with the same first and last name. It is not used for any other purpose.
- f. Type your birth year.
- g. Select the organization type: Other.

- h. Type your job title.
- i. Type your phone number, including area code.
- j. Type your mailing address.
- k. Check the information you provided to make sure it is correct.
- l. Click Submit.
- m. A message appears acknowledging your request. Click Done. The page redirects to the TEAL page.

Next Steps

Once you have received your TEAL account information, you can log on and request access to the Audit 2.0 application.

II. Requesting access to the Audit 2.0 application

Once you have a user ID for TEAL, you can request access to the Audit 2.0 application.

1. Log on to TEAL using your user name and password. The home page appears. If you have not been granted access to any applications yet, there will be no links under Applications.
2. Click Apply for Access.
3. Click Request New Account.
4. Click the link for Audit 2.0, or double-click the application name.
5. When a page appears, click Add Access.
6. Under the Employing Organization section, for the Organization field, type the name of your organization or number. Select your CPA firm from the organizations listed. This is the name of your CPA firm and the six-digit number which your firm received from TEA. If you do not see your firm listed, your firm may not be set-up as an authorized organization, please refer to section A, pages 1-3. For the CPA Personnel Role, DO NOT enter the name of the school as your Employing Organization.
7. Select the CPA Personnel role.
8. Under the County District Numbers field, type the list of schools you work with using the county district numbers (without dashes), separated by commas and without spaces.
9. Type in your six-digit organization number (same as in step 6 above) for your CPA firm under the License ID field, if it is not already displayed.
10. Click Done.
11. Click Save Changes. If the request was submitted successfully, a success message appears at the top of the tab.