

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 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 role in AUDIT.

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 role can be requested online. The Primary Approver can also request the CPA role in AUDIT.

Additional information can be found on the following web pages:

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

AUDIT CPA user role approval process:

1. A partner/RM of a CPA firm applies for and obtains a TEAL account using the form on the [TEA Secure Applications Information](#) webpage.
2. A partner/RM of the CPA firm also submits a completed Request for Access: Primary Approver in TEAL for Certified Public Accountants form (this form) to the Financial Compliance Division.
3. The partner/RM of the CPA firm will be notified when they can request access to be a TEAL Approver for their organization.
4. The partner/RM then logs on to TEAL at <https://tealprod.tea.state.tx.us/> and follows the "Setting up Approvers" instructions in the [TEAL Quick Reference for Organization Approvers \(BPD\)](#) pdf found on the [Approving TEAL & TEASE Access for Your Staff](#) web page.
5. After a partner/RM has been set up as the Primary Approver for a CPA firm, a request for the CPA role in AUDIT can then be submitted. If the Primary Approver of the CPA firm is the requestor applying for access to AUDIT, skip step 6 and go to step 7.
6. The CPA requestor applies for and obtains a TEAL account using the [TEA Login \(TEAL\) with Request New User Account](#) link found on the [TEA Secure Applications Information](#) web page.
7. After the CPA requestor obtains a TEAL account, the CPA requestor logs on to TEAL and applies for access to AUDIT.
 - a. The CPA requestor enters and selects their organization name in the "Employing Organization" section for the TEAL "Application access details" section.
 - b. The CPA requestor selects the school(s) that they will be working with. Multiple districts can be selected.
8. The CPA requestor then submits their request for the CPA role in AUDIT.
9. Once approved by their organization approver, the CPA 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).
10. Once approved at the district level, the request is sent to the TEA application service approver.
11. The CPA requestor receives notification from TEAL of approval for AUDIT.

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 FinancialDeskReviews@tea.texas.gov

For assistance please contact:

Larry Simank at 512-936-6981 or Larry.Simank@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