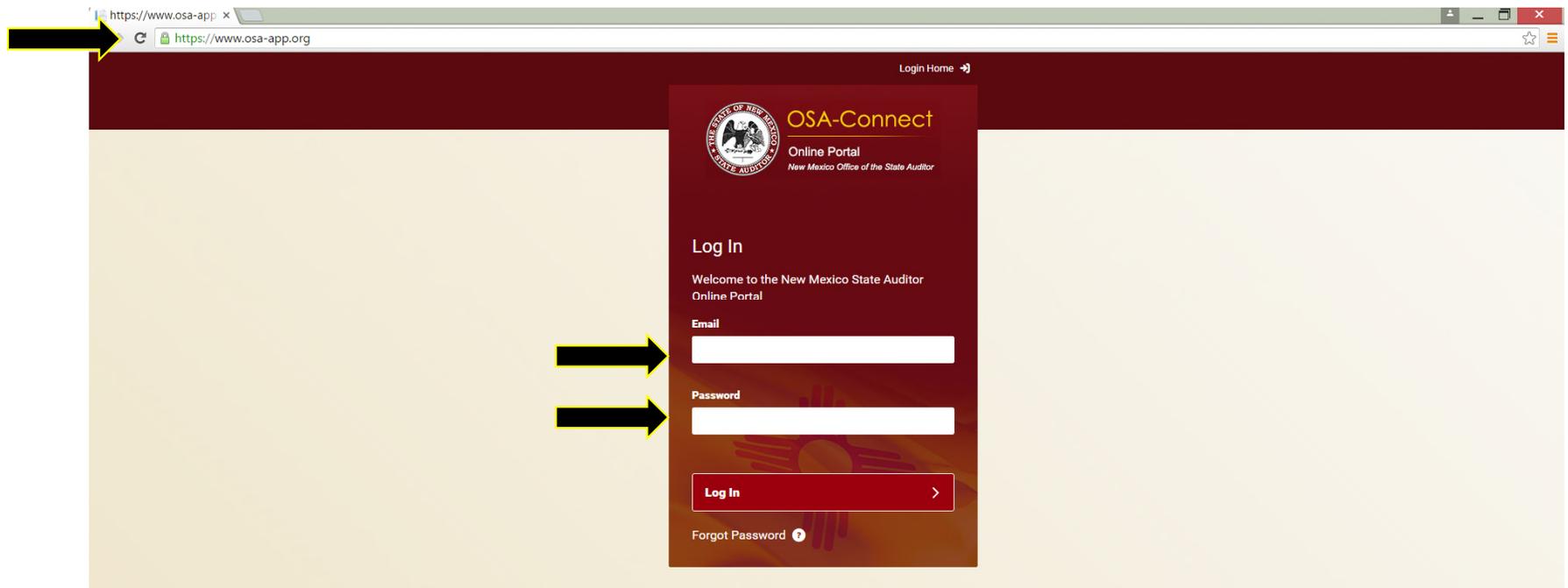


INSTRUCTIONS FOR OSA-CONNECT

Getting Started

1. You can find the OSA-Connect website at www.osa-app.org. This will take you to the login screen. You may want to bookmark this site for future reference.
2. If you received an email from OSA, use your email address and temporary password to log into the system.



INSTRUCTIONS FOR OSA-CONNECT

Getting Started

3. First, review the Agency Dashboard to confirm that your user profile is associated with the correct agency. If the agency is not correct, please contact Frank Valdez at Frank.Valdez@osa.state.nm.us.

The screenshot shows the OSA-Connect Online Portal interface. On the left is a dark red sidebar with navigation links: Agency Dashboard (highlighted with a white background and a right-pointing chevron), Agency Profile, View Past Contract Forms, and FAQs. The main content area has a white background with a dark red header. The header includes the OSA-Connect logo (The State of New Mexico Seal) and the text "OSA-Connect Online Portal New Mexico Office of the State Auditor". Below the header is the title "Agency Dashboard" followed by a horizontal line. The instruction "Select from the list of agencies below you are assigned to." is displayed. Below this is a search bar and a "Show 10 entries" dropdown. A table lists agencies with columns for "Agency Name" and "View Agency". The first row shows "Office of the State Auditor" with a "View" button and a magnifying glass icon. A yellow arrow points to the "Office of the State Auditor" text. At the bottom of the table, there are navigation links "< Previous 1 Next >" and the text "Showing 1 to 1 of 1 entries".

Agency Name	View Agency
Office of the State Auditor	View

INSTRUCTIONS FOR OSA-CONNECT

Getting Started

3. First, review the Agency Dashboard to confirm that your user profile is associated with the correct agency. If the agency is not correct, please contact Frank Valdez at Frank.Valdez@osa.state.nm.us.
4. Next, click "View" next to your agency, or click "Agency Profile" on the menu on the left side of the page, to go to the Agency Profile Page.

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Agency Dashboard >

Agency Profile ←

View Past Contract Forms

FAQs

Agency Dashboard

Select from the list of agencies below you are assigned to.

Search: Show 10 entries

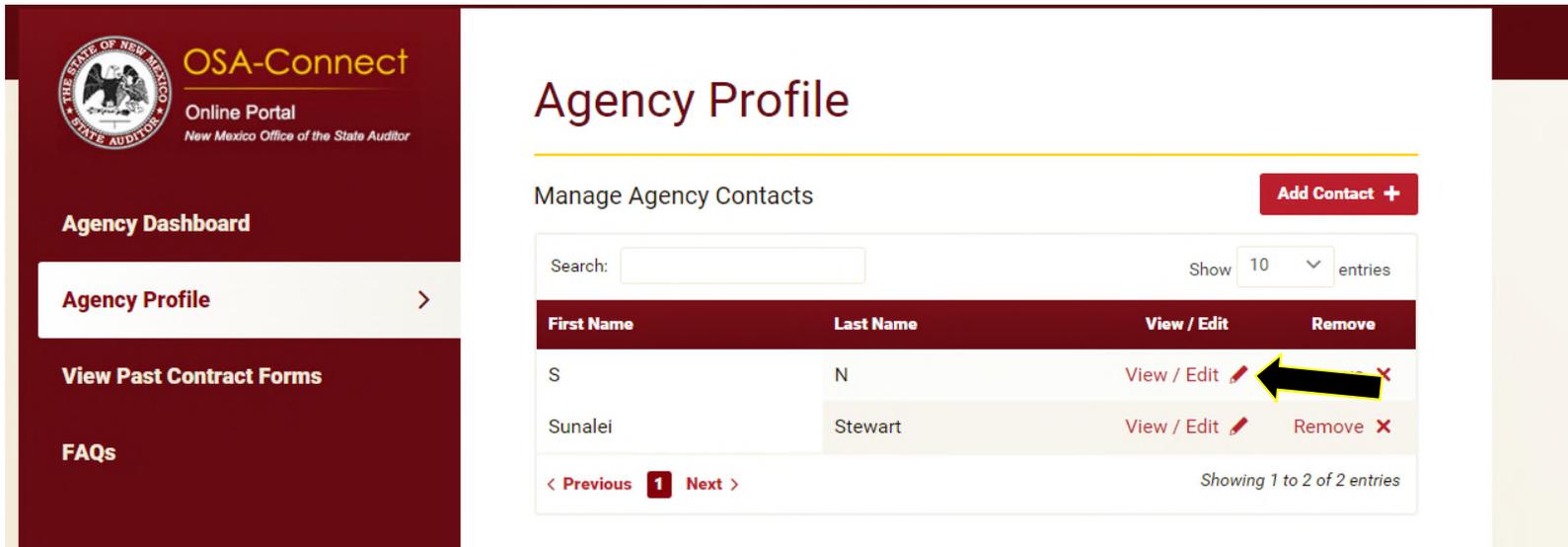
Agency Name	View Agency
Office of the State Auditor ←	View →

< Previous **1** Next > Showing 1 to 1 of 1 entries

INSTRUCTIONS FOR OSA-CONNECT

Getting Started

6. At the top of the Agency Profile page you will see an area called "Manage Agency Contacts." Please click on "View/Edit."



The screenshot displays the OSA-Connect Online Portal interface. On the left is a dark red sidebar with the state seal and navigation links: Agency Dashboard, Agency Profile (highlighted), View Past Contract Forms, and FAQs. The main content area is titled "Agency Profile" and contains a "Manage Agency Contacts" section. This section includes a search box, a "Show 10 entries" dropdown, and a table of contacts. The table has columns for First Name, Last Name, View / Edit, and Remove. Two contacts are listed: Sunalei Stewart. A yellow arrow points to the "View / Edit" link for the first contact. At the bottom of the table, there are navigation links for "Previous" and "Next" (with "1" in a red box), and a status "Showing 1 to 2 of 2 entries".

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Agency Profile

Manage Agency Contacts [Add Contact +](#)

Search: Show 10 entries

First Name	Last Name	View / Edit	Remove
S	N	View / Edit	X
Sunalei	Stewart	View / Edit	Remove X

< Previous **1** Next > Showing 1 to 2 of 2 entries

INSTRUCTIONS FOR OSA-CONNECT

Getting Started

6. You can make changes to your contact information here. You can also change your password here.
7. Click on "Save Information." This will take you back to the Agency Profile Page.

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Agency Dashboard

Agency Profile

View Past Contract Forms

FAQs

View / Edit Contact

Agency Contact Details

First Name **Last Name**

Salutation **Title**

Email Address **Confirm Email Address *Optional***

Phone Number

Old Password *Optional* **New Password *Optional***

Confirm New Password *Optional*

Save Information >

INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

1. Click “View Contract Forms” on the left side of the page, to go to the View Contract Forms Page.
2. Check the list of existing contracts to make sure that you or someone from your agency has not already begun a contract. You can click on “View” to review any contracts that may be listed as “In Progress.”
3. If you do not see an existing contract, click the button that says “Generate Form +”.

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Agency Dashboard

Agency Profile

View Contract Forms >

FAQs

View Contract Forms

Before you generate a new contract, please check the table below to see if one has already been created. [Generate Form +](#)

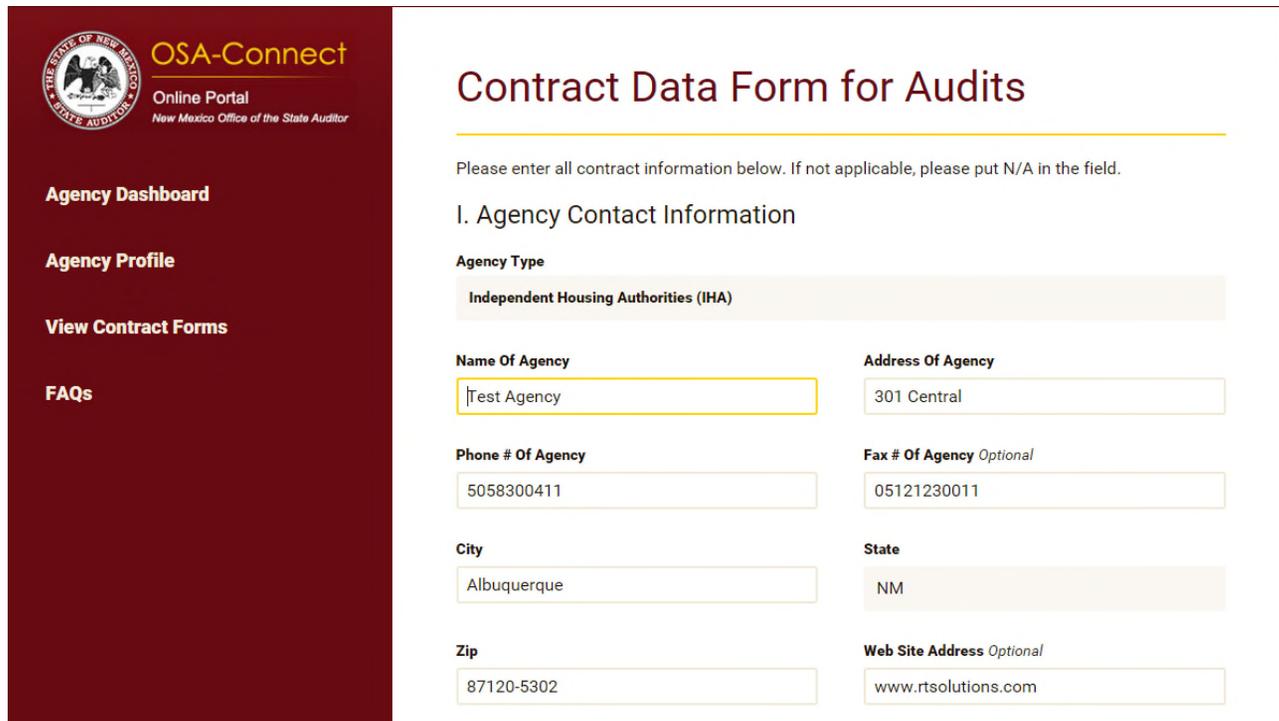
Search: Show 10 entries

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	View Contract
3/4/2016 2:59:55 PM		Averi Easley	In Progress	View
3/4/2016 8:21:21 AM	2017	Averi Easley	In Progress	View
3/4/2016 8:14:49 AM	2015	Averi Easley	In Progress	View

INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

4. This will take you to a page titled “Contract Data Form for Audits.” The contact information for your agency will be populated already. Please review and make any changes.



The screenshot displays the OSA-Connect Online Portal interface. On the left is a dark red sidebar with the state seal and navigation links: Agency Dashboard, Agency Profile, View Contract Forms, and FAQs. The main content area is white and titled "Contract Data Form for Audits". It includes a header with the OSA-Connect logo and "Online Portal" text. Below the title is a yellow horizontal line and a note: "Please enter all contract information below. If not applicable, please put N/A in the field." The form is divided into sections: "Agency Type" (Independent Housing Authorities (IHA)), "Name Of Agency" (Test Agency), "Address Of Agency" (301 Central), "Phone # Of Agency" (5058300411), "Fax # Of Agency Optional" (05121230011), "City" (Albuquerque), "State" (NM), "Zip" (87120-5302), and "Web Site Address Optional" (www.rtsolutions.com).

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Contract Data Form for Audits

Please enter all contract information below. If not applicable, please put N/A in the field.

I. Agency Contact Information

Agency Type
Independent Housing Authorities (IHA)

Name Of Agency
Test Agency

Address Of Agency
301 Central

Phone # Of Agency
5058300411

Fax # Of Agency Optional
05121230011

City
Albuquerque

State
NM

Zip
87120-5302

Web Site Address Optional
www.rtsolutions.com

INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

4. Complete the following:
 - a. Enter all Agency Head Contact Information
 - b. Review or enter Agency Contact Information (should be pre-populated)
 - c. Enter Recommended Independent Public Accountant (IPA) information
 - d. Enter Important Dates – Fiscal year should be in four digit (20--) form. Select start and completion dates from the drop down calendar.
 - e. Check the appropriate button to indicate whether your agency has a single audit



III. Important Dates

For Which Fiscal Year (FY) Is This Recommendation Being Made: 2016

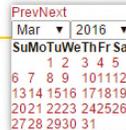
Estimated Audit Start Date

Estimated Completion Date

IV. Single Audit Requirement

Please check the box below that applies to your agency (a Single Audit should have been included in the procurement if the agency expended \$750,000 or more of federal funds):

- My agency procured an annual financial and compliance audit without a Single Audit.
- My agency procured an annual financial and compliance audit with a Single Audit.



INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

5. Check the appropriate button to indicate whether you are contracting pursuant to a multi-year proposal.

If you choose “This is a multi-year award,” then another line will appear, in which you must specify if you are in year 1, 2 or 3 of the multi-year proposal.

V. Multi Year Certification

Please check the appropriate box below:

- This is a multi-year award. 
- This is a one year procurement award for only the fiscal year indicated in Section III.

This request applies to the chosen year of a multi-year proposal:

- Year 1 Year 2 Year 3 
-

INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

6. Complete the fee and hour breakdown. For multi-year proposals, remember to put the current year's information in the appropriate column (year 1, 2 or 3). Only one year will appear if you state that this is a one-year procurement. The subtotals and totals will automatically calculate.

VI. Fee and Hour Breakdown

Do not use commas - numbers only

Category	[Year 1] Hours	[Year 1] Cost	[Year 2] Hours	[Year 2] Cost	[Year 3] Hours	[Year 3] Cost
Financial Statement Audit		[\$]		[\$]		[\$]
Financial Statement Preparation		[\$]		[\$]		[\$]
Federal Single Audit		[\$]		[\$]		[\$]
Other allowed non-audit services		[\$]		[\$]		[\$]
Component Units		[\$]		[\$]		[\$]
Other		[\$]		[\$]		[\$]
SUBTOTAL		[\$] 0.00		[\$] 0.00		[\$] 0.00
Gross Receipts Tax		[\$]		[\$]		[\$]
TOTAL	0	[\$] 0.00	0	[\$] 0.00	0	[\$] 0.00

VI. Fee and Hour Breakdown

Do not use commas - numbers only

Category	[Year 1] Hours	[Year 1] Cost
Financial Statement Audit		[\$]
Financial Statement Preparation		[\$]
Federal Single Audit		[\$]
Other allowed non-audit services		[\$]
Component Units		[\$]
Other		[\$]
SUBTOTAL		[\$] 0.00
Gross Receipts Tax		[\$]
TOTAL	0	[\$] 0.00

INSTRUCTIONS FOR OSA-CONNECT

Preparing a Contract

7. Verify the total contract price for the year for which you are contracting in the box labeled: “For the current fiscal year, total amount payable including New Mexico Receipts Tax And Expenses, Shall Not Exceed:” You do not need to include a \$ sign or any commas; they will automatically appear when you move to the next box.

For The Current Fiscal Year, Total Amount Payable Including New Mexico Receipts Tax And Expenses, Shall Not Exceed:

- 8. If your agency uses an internal tracking number, enter that number under “Agency Contract Reference Number.”
- 9. Enter the number of copies of the audit report your agency will require.
- 10. Enter any “Other provisions.”

Additional Information

Agency Contract Reference Number *Optional*

Number Of Copies To Be Delivered By The Contractor To The Agency

Other Provisions

INSTRUCTIONS FOR OSA-CONNECT

Saving, Printing and Submitting a Contract

1. At any time, you may scroll to the bottom of the page and click “Save Information.” Green text at the top of the page will read “! Information Saved Successfully”. Then you can continue working.



Agency Contract Reference Number *Optional*

Number Of Copies To Be Delivered By The Contractor To The Agency

Other Provisions

Save Information ↓

Preview & Submit ↻



! Information saved successfully ←



OSA-Connect

Online Portal

New Mexico Office of the State Auditor

Contract Data Form for Audits

Please enter all contract information below. If not applicable, please put N/A in the field.

INSTRUCTIONS FOR OSA-CONNECT

Saving, Printing and Submitting a Contract

2. When you are done entering all required information, click on “Preview and Submit.”



Agency Contract Reference Number *Optional*

Number Of Copies To Be Delivered By The Contractor To The Agency

Other Provisions

Save Information ↓ **Preview & Submit** ✓ ←

TIP: If the “Other Provisions” field comes up as mandatory, enter “None.”

If you missed any required information, the application will return you to the Contract Data Form page and will indicate the missing information.

Agency Head Contact Information

Name Of Agency Head

Title Of Agency Head

Title Of Agency Head Is Required ! ←

Email Address Of Agency Head

Agency Head Email Address Must Be Provided. ! ←

INSTRUCTIONS FOR OSA-CONNECT

Saving, Printing and Submitting a Contract

3. If you have entered all of the required information, the application will generate an HTML version of your contract. From here, if you click “Save & Print,” the application will download an HTML version of the contract that you can print or email to others in your agency or your IPA. If that is all you want to do at the time, you can then hit “Cancel” or back on your browser, log out and come back later.



Contract No.

STATE OF NEW MEXICO AUDIT CONTRACT

(Regional Educational Cooperatives and Independent Housing Authorities)

Test Agency

hereinafter referred to as the "Agency," and

INSTRUCTIONS FOR OSA-CONNECT

Saving, Printing and Submitting a Contract

3. When you return to OSA-Connect, you should see the contract you were working on as “In Progress” on the View Contract Forms screen.

OSA-Connect
Online Portal
New Mexico Office of the State Auditor

Agency Dashboard

Agency Profile

View Contract Forms >

FAQs

View Contract Forms

Before you generate a new contract, please check the table below to see if one has already been created. [Generate Form +](#)

Search: Show entries

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	View Contract
3/4/2016 2:59:55 PM		Averi Easley	In Progress	
3/4/2016 8:21:21 AM	2017	Averi Easley	In Progress	View
3/4/2016 8:14:49 AM	2015	Averi Easley	In Progress	View

INSTRUCTIONS FOR OSA-CONNECT

Saving, Printing and Submitting a Contract

5. When you are ready to submit the draft contract to OSA, from the screen where you enter contract data, click on “Preview & Submit,” which will take you to the HTML version of your contract. Then click “Save & Email to OSA.” In addition to downloading the HTML version of the contract, the application will send the draft to the OSA and a confirmation message will appear at the top of the screen.



Contract No.

STATE OF NEW MEXICO AUDIT CONTRACT

(Regional Educational Cooperatives and Independent Housing Authorities)

Test Agency

hereinafter referred to as the "Agency," and

INSTRUCTIONS FOR OSA-CONNECT

What happens next

- The OSA will receive your draft contract via email directly from the application. You do not need to email your contract.
- The OSA will review your draft contract and notify you in a letter sent by email that your contract has been approved, rejected for errors, or rejected because of some other reason. **If your contract is rejected, you will need to start a new contract to correct the errors.**
- Only **after** the OSA approves your contract, you will circulate the contract for signatures. If your agency requires approval from the Department of Finance & Administration (DFA) or some other oversight agency, you are responsible for getting the hard copy contracts and OSA approval letter to DFA. When the contract is completely signed (including DFA signatures), you will send us a final, signed version in PDF by email.

INSTRUCTIONS FOR OSA-CONNECT

Unlike past years

- There is no IPA recommendation form.
- You will not send hard copy contracts to OSA.
- OSA will not sign the contract.
- OSA will not send the contract to DFA.
- Your letter from OSA will be the only documentation of approval of your IPA and contract.

At the current time, OSA-Connect is **not available for:**

- Contracts for fiscal years other than FY2016.
- Contracts with special provisions other than those that can be specified in “Other Provisions.”