

# The New OSA-Connect Instructions



State of New Mexico  
**Office of the State Auditor**

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Quick Reference: What the status codes mean.

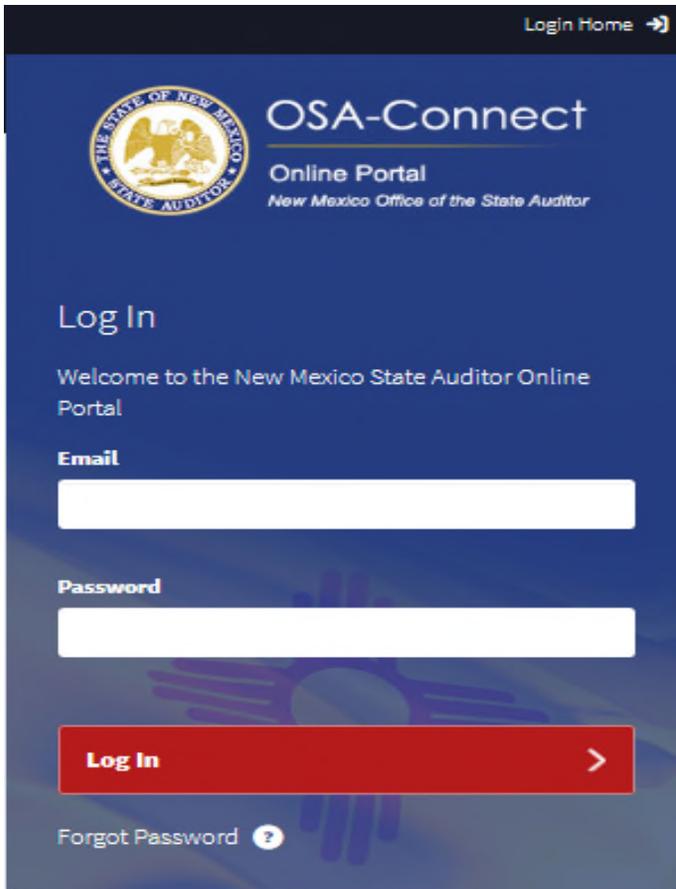
<b><u>Status Code</u></b>	<b><u>Meaning</u></b>
Submitted	A draft contract was successfully submitted.
In Progress	The draft contract was returned to you because further action is needed
Approved	The contract was approved
Executed	The executed contract was uploaded successfully

# INSTRUCTIONS FOR THE NEW OSA-CONNECT

## Getting Started

Welcome to the new version of OSA-Connect. It is complete with a new color scheme.

1. You can find the OSA-Connect website at [www.osa-app.org](http://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 have forgotten your password, please click on the “Forgot password link at the bottom, and an email with a link will be sent to the email address that was provided to us.



Log In Home →

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

Log In

Welcome to the New Mexico State Auditor Online Portal

**Email**

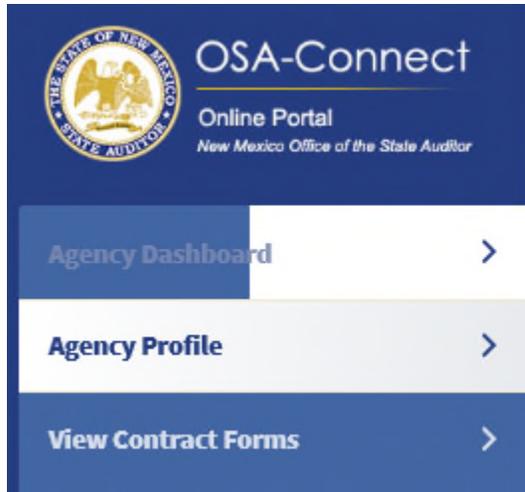
**Password**

**Log In** >

Forgot Password ?

## Adding a New Contact

1. If you are new to your agency and needing to create log in credentials, or if your agency wants to add another contact so they can log in under their own credentials to use OSA-Connect, click on the “Add Contact +” blue box.



## Agency Profile

Manage Agency Contacts

[Add Contact +](#)



Search:

Show 10 entries

First Name	Last Name	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	View / Edit	Remove

2. Please enter in all the contact information.
3. Please select all the contact types that apply to you. This is a new step.
4. Click on “Add Contact” in the red box to save the new contact at the bottom of the page.

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

Agency Dashboard >

Agency Profile >

View Contract Forms >

FAQs >

## Add New Contact

Agency Contact Details

**First Name**

**Last Name**

**Salutation**

**Title**

**Email Address**

**Confirm Email Address**

**Phone Number**

**Type Optional**

- Agency Head
- Agency Contact
- Agency Contract Contact

**Add Contact** >

Please contact the office if you need further assistance in creating a log in, and we will be happy to assist you.

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 Ralen Randel or Bernadet Martinez at 505-476-3800.

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

**Agency Dashboard** >  
**Agency Profile** >  
**View 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

## Managing Agency Contacts

1. 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.

The screenshot displays the OSA-Connect Online Portal. The left sidebar features a navigation menu with the following items: Agency Dashboard, Agency Profile, View Contract Forms, and FAQs. The main content area is titled "Agency Dashboard" and contains the instruction "Select from the list of agencies below you are assigned to." Below this is a search bar and a "Show 10 entries" dropdown. A table lists the agencies, with the following data:

Agency Name	View Agency
Office of the State Auditor	<a href="#">View</a>

At the bottom of the table, there are pagination controls: "< Previous 1 Next >" and "Showing 1 to 1 of 1 entries". A green arrow points to the "View" button in the table.

At the top of the Agency Profile page you will see an area called "Manage Agency Contacts."  
2. Please click on "View/Edit" to view or modify contact information.

The agency contact information is used to communicate with the agencies, so please ensure throughout the year that the contact information is correct.

The screenshot displays the OSA-Connect Online Portal interface. On the left is a navigation menu with options: Agency Dashboard, Agency Profile (highlighted), View Contract Forms, and FAQs. The main content area is titled "Agency Profile" and includes a "Manage Agency Contacts" section with an "Add Contact +" button. Below this is a search bar and a table of contacts. The table has columns for First Name, Last Name, Type, View / Edit, and Remove. Two contacts are listed: Frank S. Valdez and Test. A green arrow points to the "View / Edit" link for the "Test" contact. Below the table is a pagination control showing "Showing 1 to 2 of 2 entries". The "Update Agency Profile Details" section contains input fields for Agency Name (Office Of The State Auditor) and Agency Number (308), a dropdown for Agency Type (State Agencies), and a button for "Local Public Bodies Tier Determination Form".

First Name	Last Name	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>
Test	Test	Agency Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>

Different agency contact types have been added

3. Please select all the contact types that apply to you.
4. For each additional OSA-Connect user at your agency, please select the contact type that corresponds to them.

It is important to fill out the contact type for each OSA-Connect user name so we can direct correspondence to the appropriate person at your agency.

5. Click on “Save Information” in the red box at the bottom of the page.

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

Agency Dashboard >  
Agency Profile >  
View Contract Forms >  
FAQs >

### View / Edit Contact

Agency Contact Details

<b>First Name</b> Frank S	<b>Last Name</b> Valdez
<b>Salutation</b> Mr.	<b>Title</b> Staff/Contracts Manager
<b>Email Address</b> fvbetatest@gmail.com	<b>Confirm Email Address</b> <small>Optional</small>
<b>Phone Number</b> 5054763800	<b>Type</b> <small>Optional</small> <input type="checkbox"/> Agency Head <input checked="" type="checkbox"/> Agency Contact <input checked="" type="checkbox"/> Agency Contract Contact
<b>Old Password</b> <small>Optional</small>	
<b>New Password</b> <small>Optional</small>	<b>Confirm New Password</b> <small>Optional</small>

**Save Information** >

If the contact information was saved, you will see the message “Contact was successfully updated” in green writing at the top of the screen.

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

- Agency Dashboard >
- Agency Profile >**
- View Contract Forms >
- FAQs >

 **Contact was successfully updated.**

### Agency Profile

Manage Agency Contacts [Add Contact +](#)

Search:  Show 10 entries

First Name	Last Name	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>
Test	Test	Agency Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>

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

---

Update Agency Profile Details

**Agency Name**  
Office Of The State Auditor

**Agency Number**  
308

**Agency Type**  
State Agencies

[Local Public Bodies Tier Determination Form](#)

## Managing the Agency Type

1. Click on the “Agency Type” drop down menu to open the drop down menu and find your agency type in the listing.

It is important that the agency type is correctly selected because the selection determines which type of contract or certification OSA-Connect creates.

The screenshot displays the OSA-Connect Online Portal interface. The left sidebar contains navigation links: Agency Dashboard, Agency Profile (highlighted), View Contract Forms, and FAQs. The main content area is titled 'Agency Profile' and features a 'Manage Agency Contacts' section with an 'Add Contact +' button. Below this is a search bar and a table of contacts. The table has columns for First Name, Last Name, Type, View/Edit, and Remove. Two contacts are listed: Frank S. Valdez (Agency Contact / Agency Contract Contact) and Test (Agency Contact). Below the table are navigation links for 'Previous', '1', and 'Next', along with a note 'Showing 1 to 2 of 2 entries'. The 'Update Agency Profile Details' section includes input fields for Agency Name (Office Of The State Auditor), Agency Number (308), and Agency Type (State Agencies). A green arrow points to the Agency Type dropdown menu.

First Name	Last Name	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	View / Edit	Remove
Test	Test	Agency Contact	View / Edit	Remove

Agency Name: Office Of The State Auditor  
Agency Number: 308  
Agency Type: State Agencies

2. Please select the appropriate agency type from the drop down menu.

The screenshot displays a web application interface. On the left is a dark blue navigation sidebar with the following items: 'Agency Dashboard', 'Agency Profile', 'View Contract Forms', and 'FAQs', each with a right-pointing chevron. The main content area is titled 'Manage Agency Contacts'. A dropdown menu is open, listing various agency types. The 'State Agencies' option is highlighted in blue. Below the dropdown, a button labeled 'Local Public Bodies Tier Determina' is partially visible.

Manage Agency Contacts

- Local Public Body (LPB) - Tier 3
- Local Public Body (LPB) - Tier 4
- Local Public Body (LPB) - Tier 5
- Local Public Body (LPB) - Tier 6
- Local Public Body (LPB) - Do Not Qualify for Tiered System
- Comprehensive Annual Financial Report (CAFR)
- Cooperative Educational Services (CES)
- Councils of Governments (COG)
- Counties
- District Attorneys
- District Courts
- Higher Education
- Hospitals & Special Hospital Districts
- Independent Housing Authorities (IHA)
- Local Workforce Investment Boards (LWIB)
- Los Alamos County - Combined County/Municipality governments
- Public Employees Retirement Association (PERA) & Educational Retirement Board (ERB)
- Regional Education Cooperatives (REC)
- School Districts
- State Agencies**

State Agencies

Local Public Bodies Tier Determina

The Local Public Bodies Tier Determination Form blue box is only used by local public bodies that are a Tier 1 or Tier 2. Local Public Bodies who submit either an Agreed Upon Procedure contract or a Tier 1 or Tier 2 certification, please see our separate Local Public Body OSA-Connect Instructions.

**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	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>
Test	Test	Agency Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>

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

Update Agency Profile Details

**Agency Name**  
Office Of The State Auditor

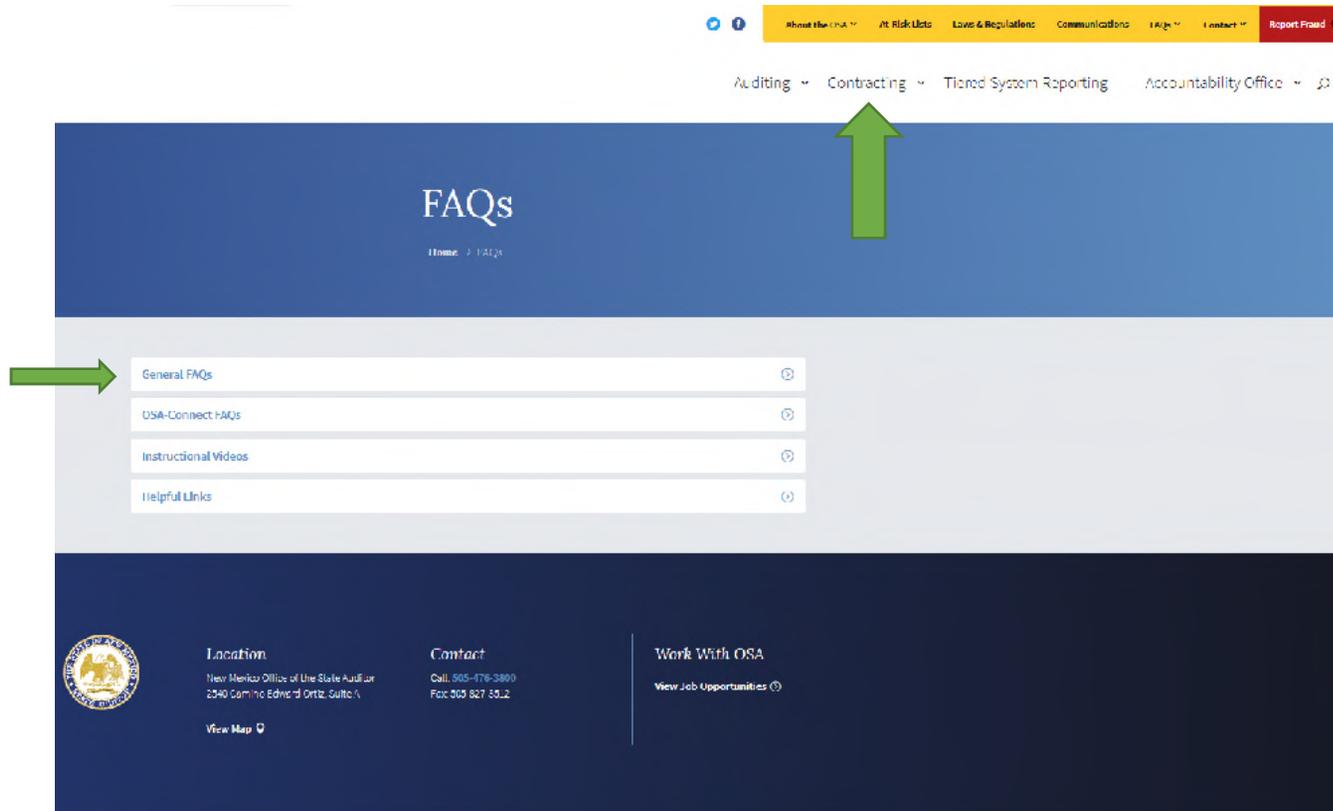
**Agency Number**  
308

**Agency Type**  
State Agencies

[Local Public Bodies Tier Determination Form](#)

## FAQs on Our OSA Website Page

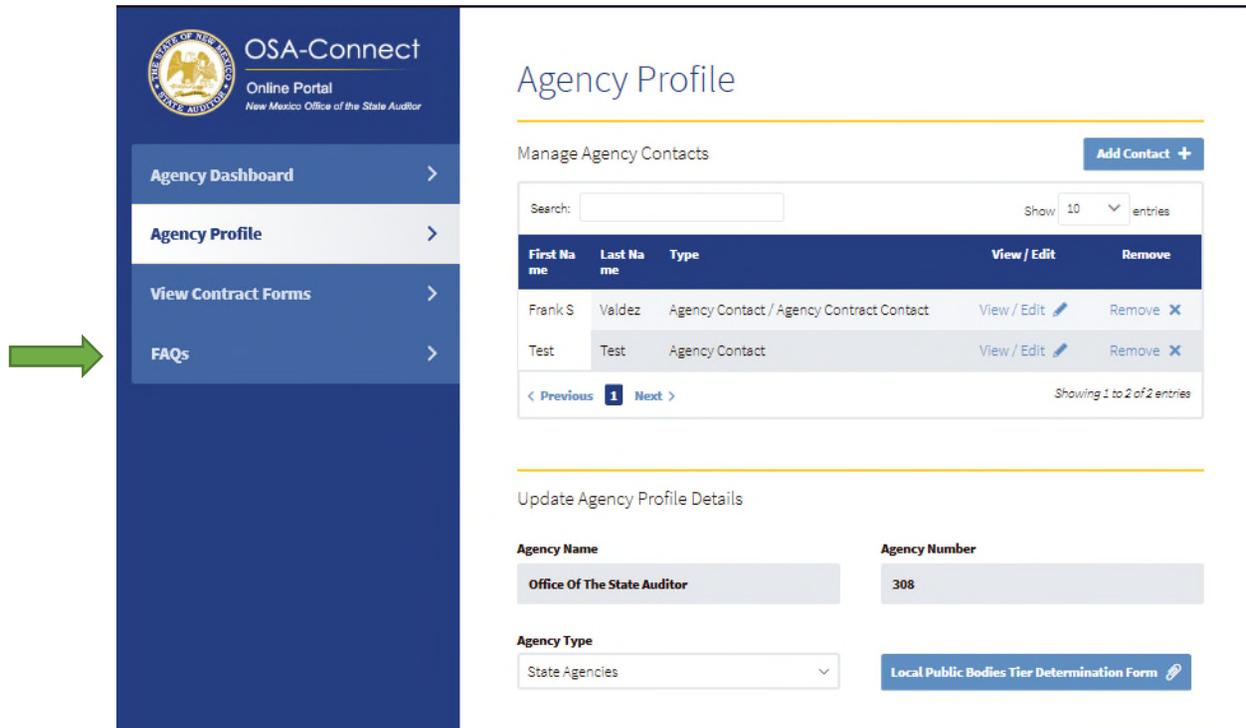
If you have any questions on the OSA-Connect contract process, answers are often found in FAQs on our OSA website page in the contracting area as seen below.



FAQs and instructional videos and written instructions will be updated periodically on this OSA web page.

Please contact us if you would like to provide feedback on our FAQs.

1. FAQs on our OSA website page can be accessed from OSA-Connect by clicking the “FAQs” link on the left side of the page.



The screenshot displays the OSA-Connect Online Portal interface. On the left, a dark blue sidebar contains navigation links: Agency Dashboard, Agency Profile, View Contract Forms, and FAQs. A green arrow points to the 'FAQs' link. The main content area is titled 'Agency Profile' and includes a 'Manage Agency Contacts' section with a search bar and a table of contacts. Below this is an 'Update Agency Profile Details' section with input fields for Agency Name, Agency Number, and Agency Type, along with a button for 'Local Public Bodies Tier Determination Form'.

**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	Type	View / Edit	Remove
Frank S	Valdez	Agency Contact / Agency Contract Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>
Test	Test	Agency Contact	<a href="#">View / Edit</a>	<a href="#">Remove</a>

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

Update Agency Profile Details

**Agency Name**  
Office Of The State Auditor

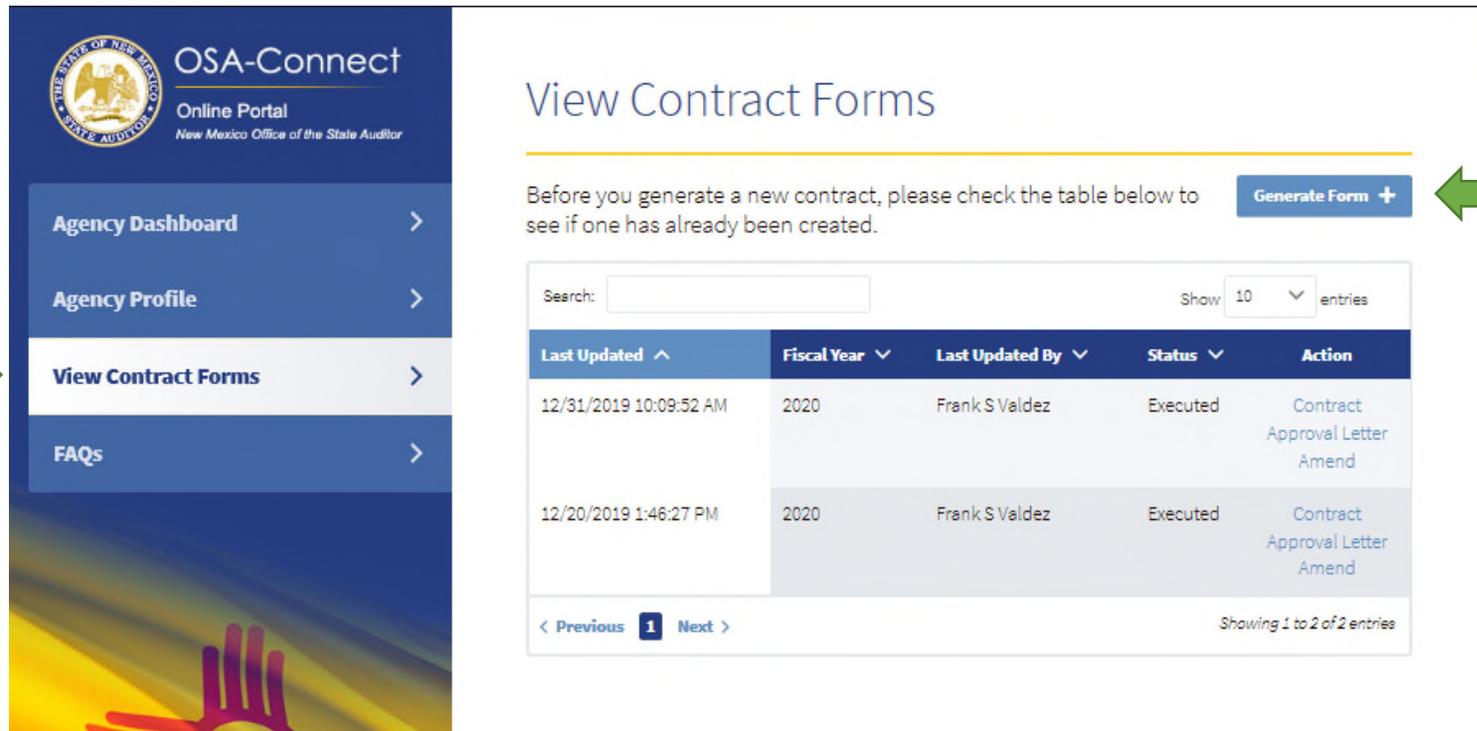
**Agency Number**  
308

**Agency Type**  
State Agencies

[Local Public Bodies Tier Determination Form](#)

## Preparing the 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 +.”



The screenshot displays the OSA-Connect Online Portal interface. On the left, a navigation sidebar contains the following items: Agency Dashboard, Agency Profile, View Contract Forms (highlighted with a green arrow), and FAQs. The main content area is titled "View Contract Forms" and includes a "Generate Form +" button (highlighted with a green arrow). Below the button is a table of existing contracts with the following data:

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	Action
12/31/2019 10:09:52 AM	2020	Frank S Valdez	Executed	Contract Approval Letter Amend
12/20/2019 1:46:27 PM	2020	Frank S Valdez	Executed	Contract Approval Letter Amend

At the bottom of the table, there are navigation links: < Previous 1 Next > and a status indicator: Showing 1 to 2 of 2 entries.

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 necessary changes.
5. Complete the following:
  - a. Enter all the Agency Head Contact Information
  - b. Review or enter Agency Contact Information (should be pre-populated)

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

- Agency Dashboard >
- Agency Profile >
- View Contract Forms >**
- FAQs >

### Contract Data Form for Audits

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

#### I. Agency Contact Information

**Agency Type**  
State Agencies

**Name Of Agency**  
Office of the State Auditor

**Address Of Agency**  
2510 Camino Edward Ortiz, Suite A

**Phone # Of Agency**  
505-475-3800

**Fax # Of Agency (Optional)**  
505-827-8512

**City**  
Santa Fe

**State**  
NM

**Zip**  
87507

**Web Site Address (Optional)**  
www.sanm.org

#### Agency Head Contact Information

**Name Of Agency Head**

**Title Of Agency Head**

**Email Address Of Agency Head**

#### Agency Contact Information

**Name Of Agency Contact**  
Text Text

**Title Of Agency Contact**  
Agency Contact

**Phone # Of Agency Contact**  
505 475 3800

**Fax # Of Agency Contact (Optional)**

**Email Address Of Agency Contact**  
info@osa.state.nm.us

6. Enter recommended Independent Public Accountant (IPA) information  
Typing the first few letters will automatically bring up an IPA firm name.  
Please only use the firm name that automatically comes up rather than typing in a  
IPA firm name because OSA-Connect only brings up IPA firms on our approved firm list.

Please contact us if you have any questions on an IPA firm that you are considering and it doesn't come up after typing the first few letters of the firm name.

## II. Recommended Independent Public Accountant (IPA) Information

As required by the Audit Rule, an IPA subject to contract restriction is responsible for informing this agency whether it is eligible to engage in this proposed contract. By signing the signature page, I am verifying herein that the IPA has certified its eligibility to engage in this proposed contract

<b>On-Site Manager Name</b>	<b>Name Of IPA Firm</b>
<input type="text" value="Arthur Baca"/>	<input type="text" value="Art"/>
	<input type="text" value="Arthur Consulting"/>
<b>Phone #</b>	<b>Fax #</b> <i>Optional</i>
<input type="text"/>	<input type="text"/>



Enter Important Dates – Fiscal year should be in four digit (20--) form.

7. Please enter the estimated start and completion dates from the drop down calendar.

8. Check the appropriate button to indicate whether your agency has a single audit

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

Agency Dashboard >  
Agency Profile >  
**View Contract Forms >**  
FAQs >

III. Important Dates

For Which Fiscal Year (FY) Is This Recommendation Being Made: 2020

What Is Your Agency's Exact Fiscal Year End Date?: 06/30/2020

Estimated Audit Start Date: 07/01/2020

Estimated Completion Date: [Calendar]

IV. Single Audit Requirement

Please check the box below that applies to your agency (a SPB or RFP procurement if the agency expended \$750,000 or more of federal funds in the fiscal year indicated in Section III.)

My agency procured an annual financial and compliance audit with a single audit.

My agency procured an annual financial and compliance audit with multiple audits.

V. Small Purchase Bid (SPB) or Request for Proposal (RFP) Information

Please check the appropriate box below:

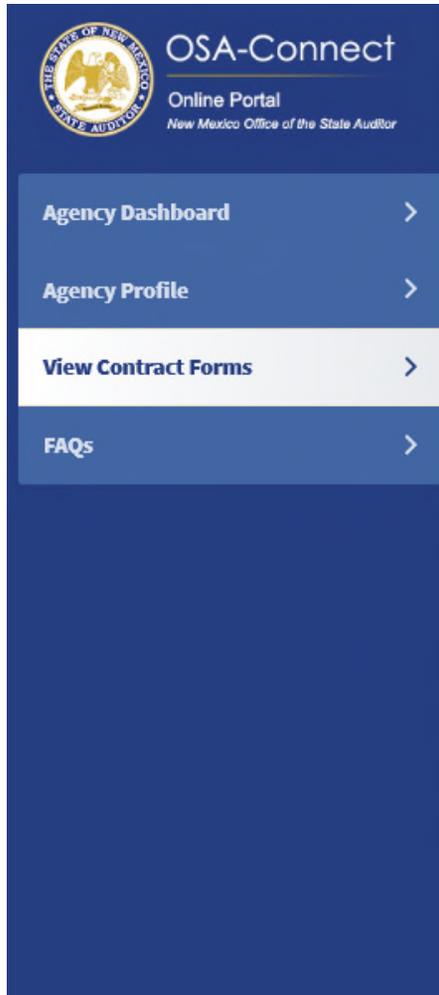
This is a multi-year SPB or RFP.

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

The Section V question is the same question asked in the past just reworded.

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

Selecting a one year procurement brings up a table for one year.



V. Small Purchase Bid (SPB) or Request for Proposal (RFP) Information

Please check the appropriate box below:



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

VI. Fee and Hour Breakdown

Do not use commas - numbers only

Category	[Year 1] Hours	[Year 1] Cost
Financial Statement Audit	20	\$100.00
Financial Statement Preparation	20	\$100.00
Federal Single Audit	20	\$100.00
Other allowed non-audit services		\$0.00
Component Units		\$0.00
Other		\$0.00
Gross Receipts Tax		\$50.00
<b>TOTAL</b>	<b>60</b>	<b>[\$] 350.00</b>

10. If you have or are contracting pursuant to a multi-year proposal, the option “This is a multi-year SPB or RFP” must be selected.
11. After choosing “multi-year SPB or RFP,” the next question appears asking for which year in the multi-year proposal is being submitted.  
Please specify whether you are in year 1, 2 or 3 of the multi-year proposal.

V. Small Purchase Bid (SPB) or Request for Proposal (RFP) Information

**Please check the appropriate box below:**

- This is a multi-year SPB or RFP.
- 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

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	20	\$100.00		\$0.00		\$0.00
Financial Statement Preparation	20	\$100.00		\$0.00		\$0.00
Federal Single Audit	20	\$100.00		\$0.00		\$0.00
Other allowed non-audit services		\$0.00		\$0.00		\$0.00
Component Units		\$0.00		\$0.00		\$0.00
Other		\$0.00		\$0.00		\$0.00
Gross Receipts Tax		\$50.00		\$0.00		[\$]
<b>TOTAL</b>	<b>60</b>	<b>[\$] 350.00</b>	<b>[0]</b>	<b>[\$]</b>	<b>[0]</b>	<b>[\$]</b>

13. Please fill in the information for each year including all prior years if OSA-Connect does not automatically fill in the information for the prior years.

The prior year information is needed.

The subtotals and totals will automatically calculate.

14. The amount of the gross receipts tax is now required to be entered. The IPA can provide you with the gross receipts tax amount(s).

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

Year 1  Year 2  Year 3

#### 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	250	\$450,000.00		\$0.00		\$0.00
Financial Statement Preparation	40	\$10,000.00		\$0.00		\$0.00
Federal Single Audit	80	\$80,000.00		\$0.00		\$0.00
Other allowed non-audit services	20	\$18,000.00		\$0.00		\$0.00
Component Units	60	\$125,000.00		\$0.00		\$0.00
Other		\$0.00		\$0.00		\$0.00
Gross Receipts Tax		\$39,000.00		\$0.00		\$0.00
<b>TOTAL</b>	<b>450</b>	<b>[\$] 722,000.00</b>	<b>0</b>	<b>[\$] 0.00</b>	<b>0</b>	<b>[\$]0.00</b>



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

### Additional Information

**Agency Contract Reference Number** *Optional*

75-2020

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

3

**Other Provisions** *Optional*

Specify if other provisions exist.



18. At any time, you may scroll to the bottom of the page and click “Save Information.”

Additional Information

Agency Contract Reference Number *Optional*

75-2020

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

3

Other Provisions *Optional*

Specify if other provisions exist.



Save Information ↓

Preview & Submit ↻

Green text at the top of the page will read “! Information Saved Successfully”. Then you can continue working.

! Information saved successfully



## 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

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

Category	[Year 1] Hours	[Year 1] Cost	[Year 2] Hours	[Year 2] Cost	[Year 3] Hours	[Year 3] Cost
Financial Statement Audit	250	\$450,000.00		\$0.00		\$0.00
Financial Statement Preparation	40	\$10,000.00		\$0.00		\$0.00
Federal Single Audit	80	\$80,000.00		\$0.00		\$0.00
Other allowed non-audit services	20	\$18,000.00		\$0.00		\$0.00
Component Units	60	\$125,000.00		\$0.00		\$0.00
Other		\$0.00		\$0.00		\$0.00
Gross Receipts Tax		\$39,000.00		\$0.00		\$0.00
<b>TOTAL</b>	<b>450</b>	<b>[\$] 722,000.00</b>	<b>0</b>	<b>[\$] 0.00</b>	<b>0</b>	<b>[\$]0.00</b>

Additional Information

Agency Contract Reference Number *Optional*

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

Other Provisions *Optional*



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

## Saving, Printing and Submitting a Contract

1. If you have entered all of the required information, the application will generate an HTML version of your contract.

If you click “Save & Print,” the application will download an HTML version of the contract that you can print or email to others.

If that is all you want to do at the time, you can then select “Cancel” or back on your browser, log out, and come back later.

Mode

Save & Print ↓ Save & Notify OSA ↓ Cancel

STATE OF NEW MEXICO  
AUDIT CONTRACT  
(State Agencies with DFA Approval)

Office of the State Auditor  
hereinafter referred to as the "Agency," and

Arthur Consulting  
hereinafter referred to as the "Contractor," agree:

Contract No. 75-2020

Submitting the draft contract to OSA

2. When you are ready to submit the draft contract to OSA, click on “Save & Notify OSA.”  
A confirmation message will appear at the top of the screen if it was submitted.



Mode Save & Print ↓ Save & Notify OSA ↓ Cancel

Contract No. 75-2020

STATE OF NEW MEXICO  
AUDIT CONTRACT

(State Agencies with DFA Approval)

Office of the State Auditor

hereinafter referred to as the "Agency," and

Arthur Consulting

hereinafter referred to as the "Contractor," agree:

3. When you return to OSA-Connect, you will be able to see the status of the contract by selecting “View Contract Forms” on the left had side. A “Submitted” status means it was successfully submitted.

The screenshot shows the OSA-Connect Online Portal interface. On the left, a navigation menu includes 'Agency Dashboard', 'Agency Profile', and 'View Contract Forms', with a green arrow pointing to the latter. The main content area is titled 'View Contract Forms' and contains a 'Generate Form +' button and a table of contract forms. The table has columns for 'Last Updated', 'Fiscal Year', 'Last Updated By', 'Status', and 'Action'. A single row is visible with the status 'Submitted', and a green arrow points to the 'View' link in the 'Action' column.

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	Action
1/3/2020 12:46:32 PM	2020	Test Test	Submitted	<a href="#">View</a>

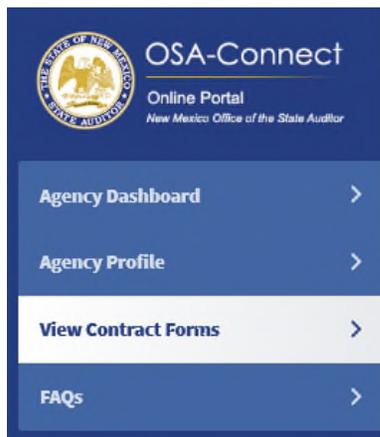
The draft contract that was submitted can be viewed by clicking on “View” as before. However the contract has not been approved by OSA at this point, and you will need to wait until it is approved.

In the new OSA-Connect, after submitting a draft contract electronically through OSA-Connect you will receive an email from [donotreply@osa.state.nm.us](mailto:donotreply@osa.state.nm.us) with pertinent information, and prompting you to login to OSA-Connect. For example, an email could indicate a draft contract was denied.

### New process to Make Changes and Resubmit the Draft Contract

In the new OSA-Connect, you will be able to go back into the draft contract and make any needed changes and resubmit it instead of creating a new contract to correct something.

1. To start the process, go to “View Contract Forms” on the left hand side.  
The status has now changed to “In Progress” signifying that the draft contract was returned to you because further action was needed.
2. Click on “Edit” to view what is needed in the new OSA-Connect.



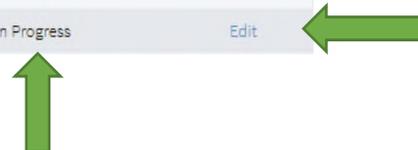
### View Contract Forms

Before you generate a new contract, please check the table below to see if one has already been created.

Generate Form +

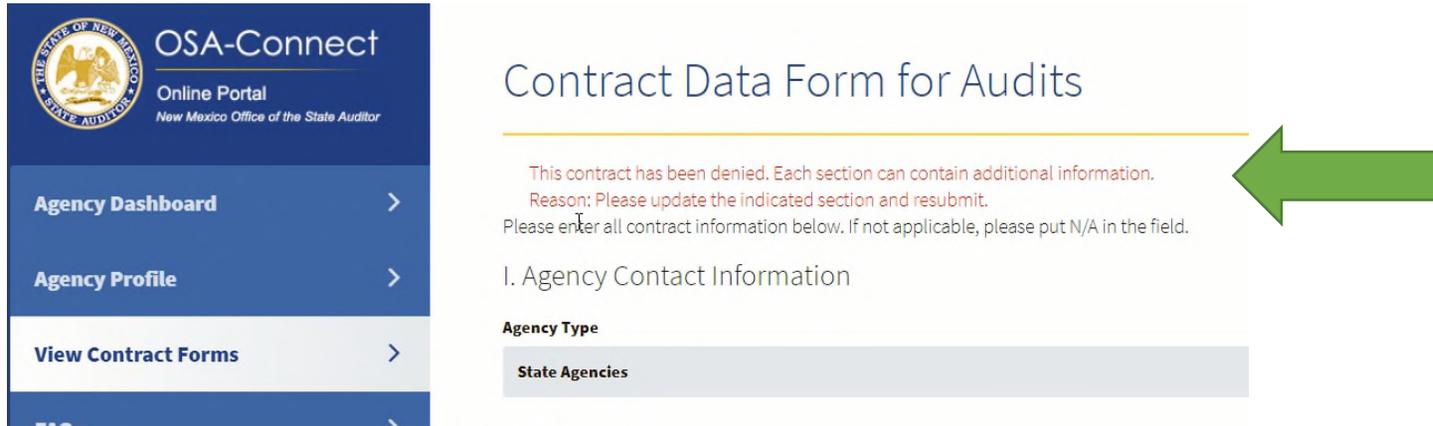
Search:  Show 10 entries

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	Action
1/3/2020 12:46:32 PM	2020	Test Test	Submitted	View
1/3/2020 10:10:36 AM	2019	Frank S Valdez	In Progress	Edit



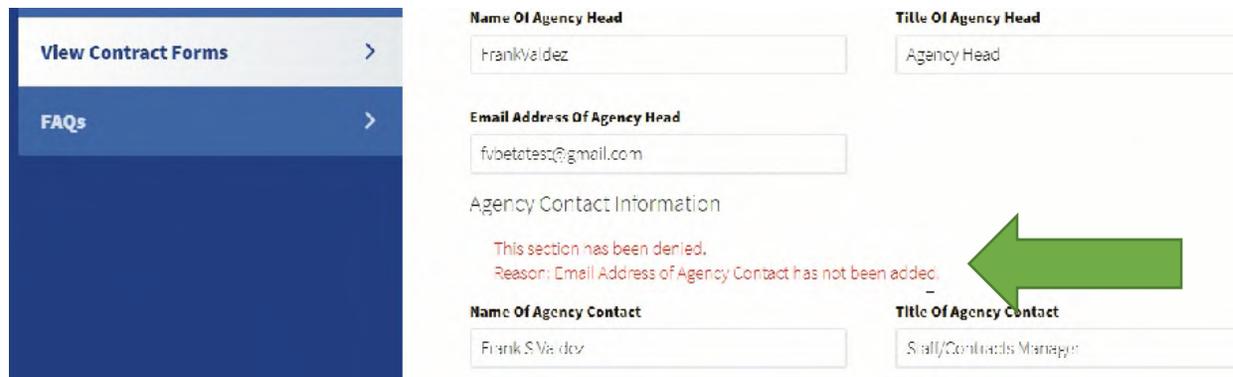
A message at the top in red will provide an explanation.  
Note there could be multiple sections needing changes.

3. Please check each section for messages explaining what needs to be corrected.



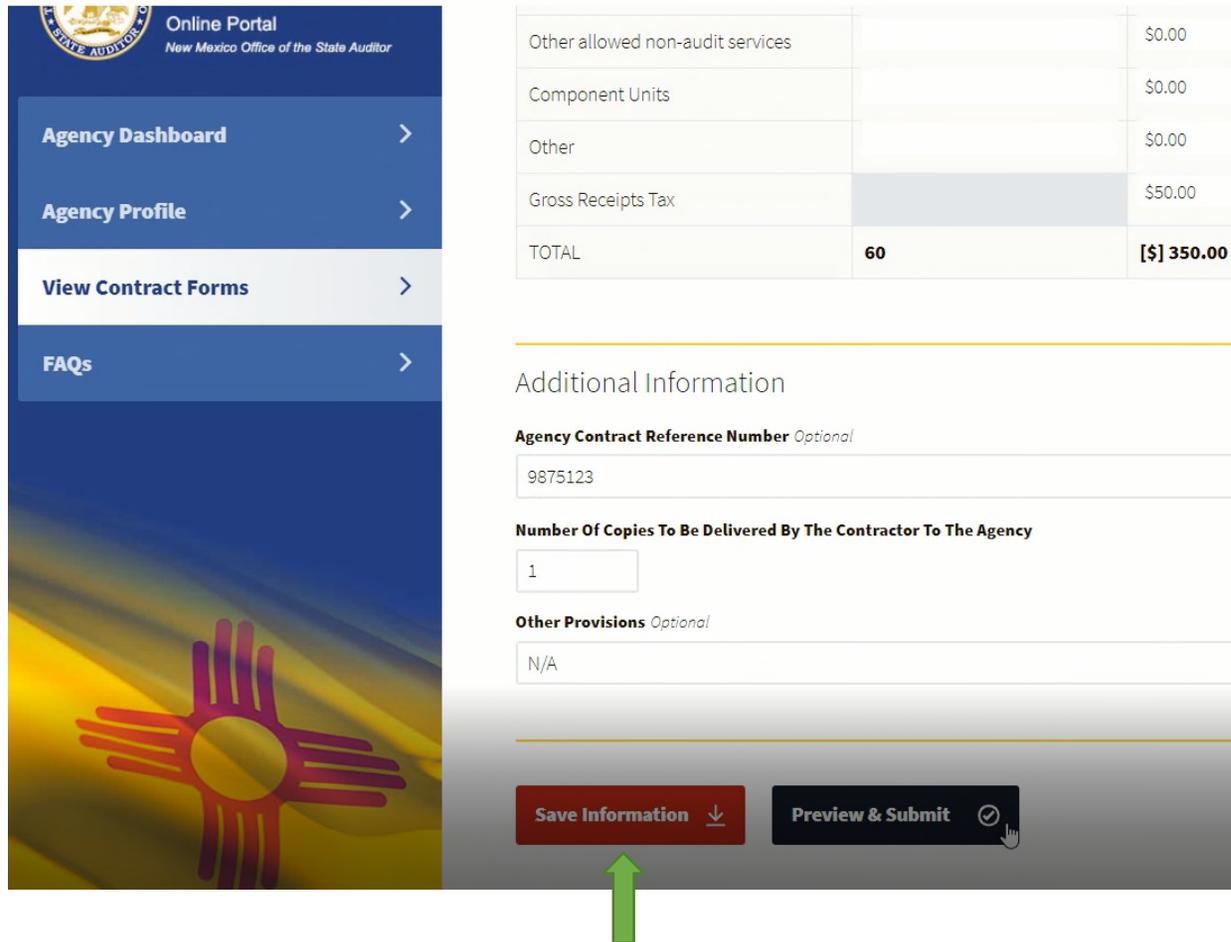
The screenshot shows the OSA-Connect Online Portal interface. On the left is a navigation menu with options: Agency Dashboard, Agency Profile, View Contract Forms, and FAQs. The main content area is titled "Contract Data Form for Audits". At the top of this area, a red error message reads: "This contract has been denied. Each section can contain additional information. Reason: Please update the indicated section and resubmit." Below this, a green arrow points to the message. Further down, the "Agency Contact Information" section is visible, with "Agency Type" set to "State Agencies".

4. So, look through the Contract Data Form for Audits, and find the section that was denied. The section will have a message in red explaining why the draft was denied and what is needed as seen in this example.



This screenshot shows a detailed view of the "Agency Contact Information" section of the form. It includes input fields for "Name Of Agency Head" (Frank Valdez), "Title Of Agency Head" (Agency Head), "Email Address Of Agency Head" (fvoetatest@gmail.com), "Name Of Agency Contact" (Frank S Valdez), and "Title Of Agency Contact" (Staff/Contracts Manager). A red error message is displayed: "This section has been denied. Reason: Email Address of Agency Contact has not been added." A green arrow points to this message.

5. Click on “Save Information” to save changes made to the draft contract.  
If the changes were saved, a green text at the top of the page will read “! Information Saved Successfully.”



The screenshot displays the 'Online Portal' for the New Mexico Office of the State Auditor. The left sidebar contains navigation links: Agency Dashboard, Agency Profile, View Contract Forms, and FAQs. The main content area shows a table of contract items, a section for 'Additional Information' with input fields for 'Agency Contract Reference Number' (9875123), 'Number Of Copies To Be Delivered By The Contractor To The Agency' (1), and 'Other Provisions' (N/A). At the bottom, there are two buttons: 'Save Information' and 'Preview & Submit'. A green arrow points to the 'Save Information' button, and another green arrow points to a success message at the top: '! Information saved successfully'.

Other allowed non-audit services		\$0.00
Component Units		\$0.00
Other		\$0.00
Gross Receipts Tax		\$50.00
<b>TOTAL</b>	<b>60</b>	<b>[\$] 350.00</b>

Additional Information

**Agency Contract Reference Number** *Optional*  
9875123

**Number Of Copies To Be Delivered By The Contractor To The Agency**  
1

**Other Provisions** *Optional*  
N/A

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

! Information saved successfully

## Saving, Printing and Submitting a Contract

1. Then follow the same process as in the original submission in OSA-Connect by clicking “Preview & Submit.”

Information saved successfully

Other allowed non-audit services		\$0.00
Component Units		\$0.00
Other		\$0.00
Gross Receipts Tax		\$50.00
<b>TOTAL</b>	<b>60</b>	<b>[\$] 350.00</b>

Additional Information

**Agency Contract Reference Number** *Optional*  
9875123

**Number Of Copies To Be Delivered By The Contractor To The Agency**  
1

**Other Provisions** *Optional*  
N/A

Save Information ↓    Preview & Submit ✓



If you have entered all of the required information, the application will generate an HTML version of your contract as seen in the example below.



2. 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 this time, you can then select “Cancel” or back on your browser and log out.

3. When you are ready to submit the draft contract to OSA, click on “Save & Notify OSA.”  
A confirmation message will appear at the top of the screen.



Mode

Save & Print ↓ Save & Notify OSA ↓ Cancel

Contract No. 75-2020

STATE OF NEW MEXICO  
AUDIT CONTRACT  
(State Agencies with DFA Approval)

Office of the State Auditor

---

hereinafter referred to as the "Agency," and

Arthur Consulting

---

hereinafter referred to as the "Contractor," agree:

The process of the agency making changes, resubmission, and OSA review continues until all issues are resolved.

### New Approval Process

Once the contract is approved, you will receive an email indicating your contract was approved. The email will be from “donotreply@osa.state.nm.us”. The approval letter will be attached for your records.

In OSA-Connect, go to “View Contract Forms” on the left side. The status will change to “Approved” indicating the contract was approved.

OSA-Connect also has a new feature to access the approval letter. Simply click “Approval Letter” to view, print, or save.

## View Contract Forms

Before you generate a new contract, please check the table below to see if one has already been created.

[Generate Form +](#)

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	Action
12/31/2019 10:09:52 AM	2020	Frank S Valdez	Approved	<a href="#">View</a> <a href="#">Upload</a> <a href="#">Approval Letter</a>
12/20/2019 1:46:27 PM	2020	Frank S Valdez	Executed	<a href="#">Contract</a> <a href="#">Approval Letter</a> <a href="#">Amend</a>

< Previous **1** Next >

Showing 1 to 2 of 2 entries

### New Contract Execution Process

1. In OSA-Connect, go to “View Contract Forms” on the left hand side.
2. Click “View” to open the draft contract for use in obtaining the required signatures.

## View Contract Forms

Before you generate a new contract, please check the table below to see if one has already been created.

**Generate Form** +

Last Updated ^	Fiscal Year v	Last Updated By v	Status v	Action
12/31/2019 10:09:52 AM	2020	Frank S Valdez	Approved	<a href="#">View</a> <a href="#">Upload Approval Letter</a>
12/20/2019 1:46:27 PM	2020	Frank S Valdez	Executed	<a href="#">Contract Approval Letter Amend</a>

Search:  Show 10 entries

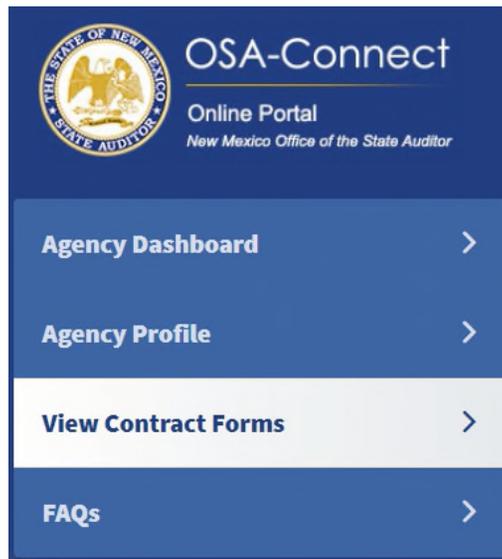
< Previous **1** Next > Showing 1 to 2 of 2 entries

## New Submission Process of Executed Contracts

1. After your contract is signed by all parties, and scanned into your computer, the executed (signed contract) is uploaded into OSA-Connect directly.

**Signed contracts are no longer submitted to OSA via email to [reports@osa.state.nm.us](mailto:reports@osa.state.nm.us).**

2. Click “Upload” to start the process.



## 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	Action
12/31/2019 10:09:52 AM	2020	Frank S Valdez	Approved	View Upload Approval Letter



The screen below will come up to assist you in uploading the executed (signed contract) into OSA-Connect for submission to OSA.

3. Click on “Choose File” and locate the executed contract in your computer, and click on the executed contract in your computer to select it.
4. Enter in the latest date signed. Note, this date could be the GSD Contracts Review Bureau signature date if you work for a state agency. The date information is required.

## Upload Contract

Browse to the location of your signed and executed Contract that you want associated with this item.

Office of t...2).html.pdf

 Date of Last Signature:

12/31/2019



5. Click on the red “Upload” button to upload the executed (signed contract) into OSA-Connect to submit it to OSA.

OSA-Connect will take you to this screen in “View Contracts Forms.” Notice the status has changed to “Executed” to signify the executed contract was uploaded successfully.



The navigation menu for OSA-Connect includes the following items:

- 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	Action
12/31/2019 10:09:52 AM	2020	Frank S Valdez	<b>Executed</b>	Contract Approval Letter Amend



Please Keep in Mind:

- If you are needing to do a contract amendment, please see our separate OSA Contract Amendment Instructions.
  - Please see the OSA Audit Rule contract amendment section for the circumstances when contract amendments are done and the contract amendment requirements.
- Hard copy contracts are not to be sent to OSA.
- OSA does not sign the contract.
- OSA does not send the contract for approval by GSD's Contracts Review Bureau if applicable.
- OSA does not send the contract for approval by the Public Education Department or Higher Education Department required by NMSA 1978, Section 12-6-14, if applicable.
- Your letter from OSA will be the only documentation of approval of your IPA and contract.

OSA-Connect is also used for:

- **Contracts for past fiscal years for entities who are catching up on late audits or AUPs; and**
- Contracts with special provisions other than those that can be specified in "Other Provisions."