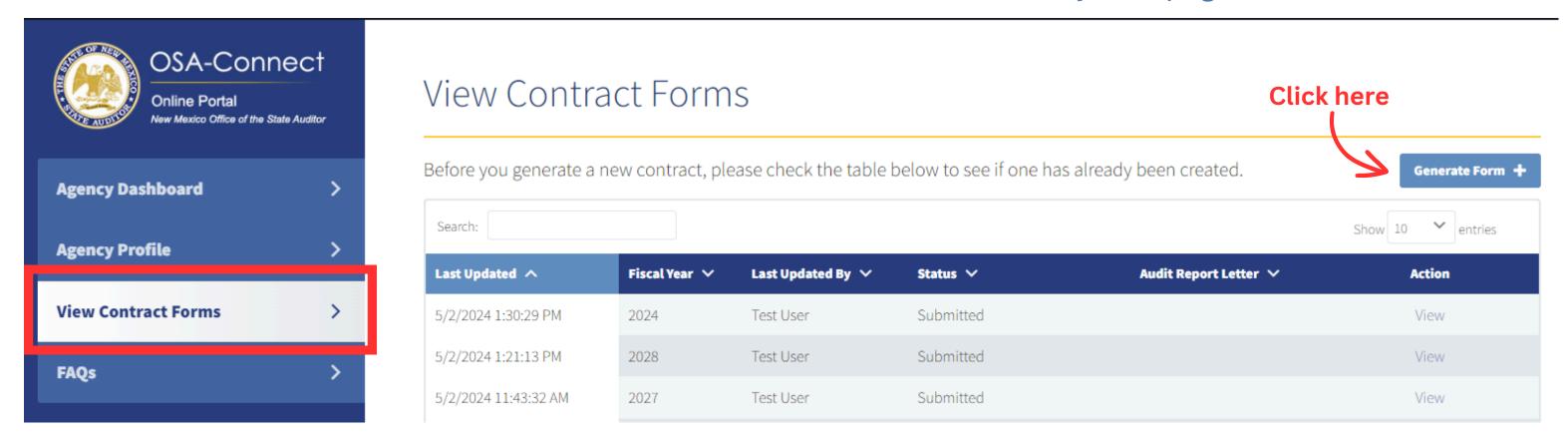


Creating an Agreed Upon Procedure (AUP) Contract

For Local Public Bodies (Tiers 3-6)

Creating Your Contract

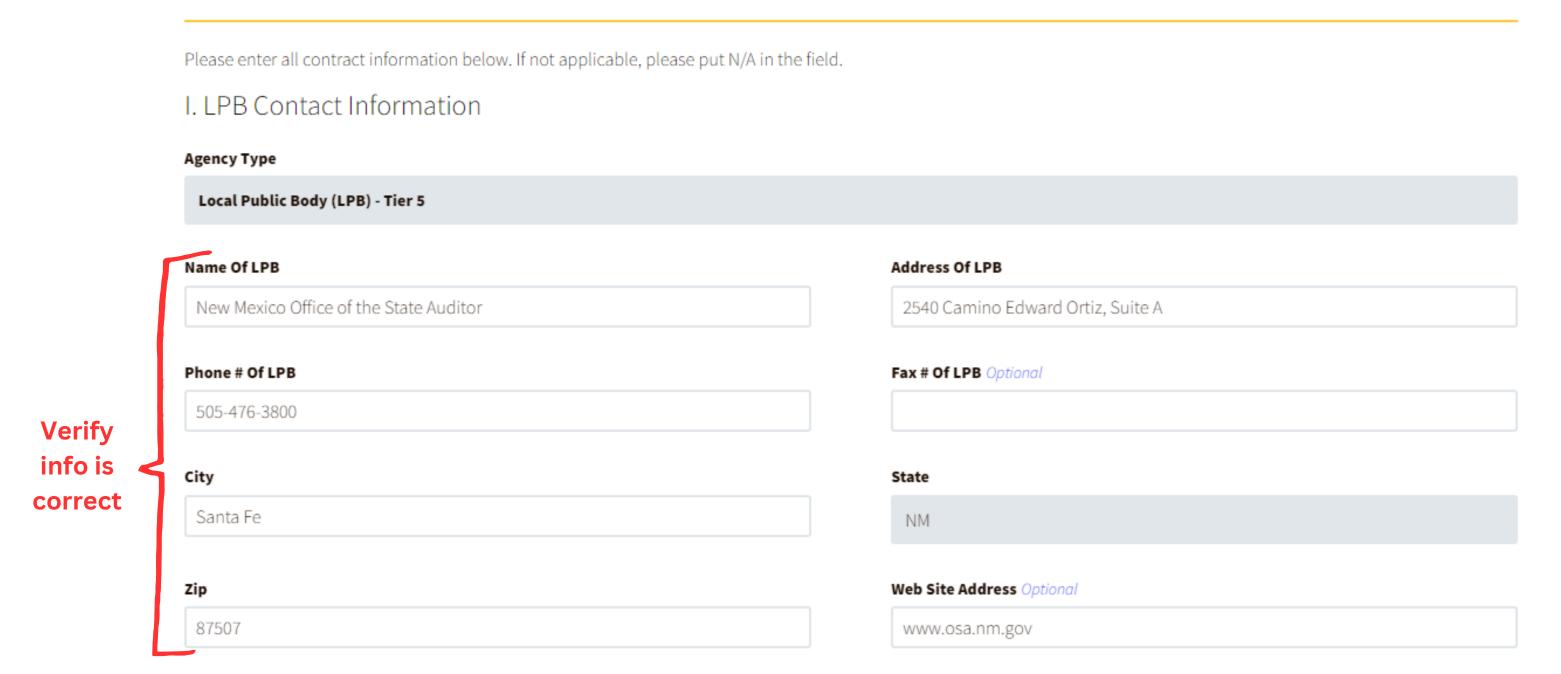
Begin by navigating to the 'View Contract Forms' tab on the left-hand side of the screen. Click on 'Generate Form' to access the Contract Data Form for Local Public Bodies under the Tiered System page



This form consists of five sections.

In Section I: LPB Contact Information, some details will be pre-filled. Please verify their accuracy.

Contract Data Form for Local Public Bodies under the Tiered System



Provide Name Of LPB Head Title Of LPB Head the LPB Head name, **Email Address Of LPB Head** title and email LPB Contact Information Name Of LPB Contact Title Of LPB Contact Test User Tester **Verify info** is correct Phone # Of LPB Contact Fax # Of LPB Contact Optional and up to 505-476-3800 date and make **Email Address Of LPB Contact** appropriate helpdesk@osa.nm.gov changes Note: Please fill out e-mail address of contact person. All fully executed contracts will be sent via e-mail unless otherwise requested. In Section II, provide the contact information for your selected Independent Public Accountant (IPA). Please provide the on-site manager's name, phone number and email. In the Name of IPA firm it's important to note that you MUST select their name from the drop down list. II. Recommended Independent Public Accountant (IPA) Information As required by the Audit Rule, an IPA subject to contract restriction is responsible for informing this LPB 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. **On-Site Manager Name** Name Of IPA Firm **Provide the** information of your selected IPA Phone # here Search the IPA E-Mail Address Firm by typing the first few letters of their name. *Do not type the entire 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 LPB 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. On-Site Manager Name Name Of IPA Firm Real Time Solutions Test FirmA drop Phone # Precision Accounting, LLC down will appear. REDW, LLC **Select your IPA** Dingus, Zarecor & Associates, PLLC firm from the E-Mail Address Macias, Gutierrez & Co., CPAs, PC

Mackie, Reid & Company, PA

Rubino & Company, Chartered

drop down

LPB Head Contact Information

In section III enter the Fiscal Year, the estimated start date, and the estimated completion date. III. Important Dates For Which Fiscal Year (FY) Is This Recommendation Being Made: **Estimated Audit Start Date Estimated Completion Date** 05/01/2024 05/31/2024 In Section IV, specify whether this is a multi-year SPB or RFP, or a one-year award. IV. 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 award for only the fiscal year indicated in Section 111. If it is a multiyear a new field will populate, allowing you to select which year of the multiyear proposal this contract applies to. IV. 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 award for only the fiscal year indicated in Section 111. This request applies to the chosen year of a multi-year proposal: Year 1 Year 2 O Year 3

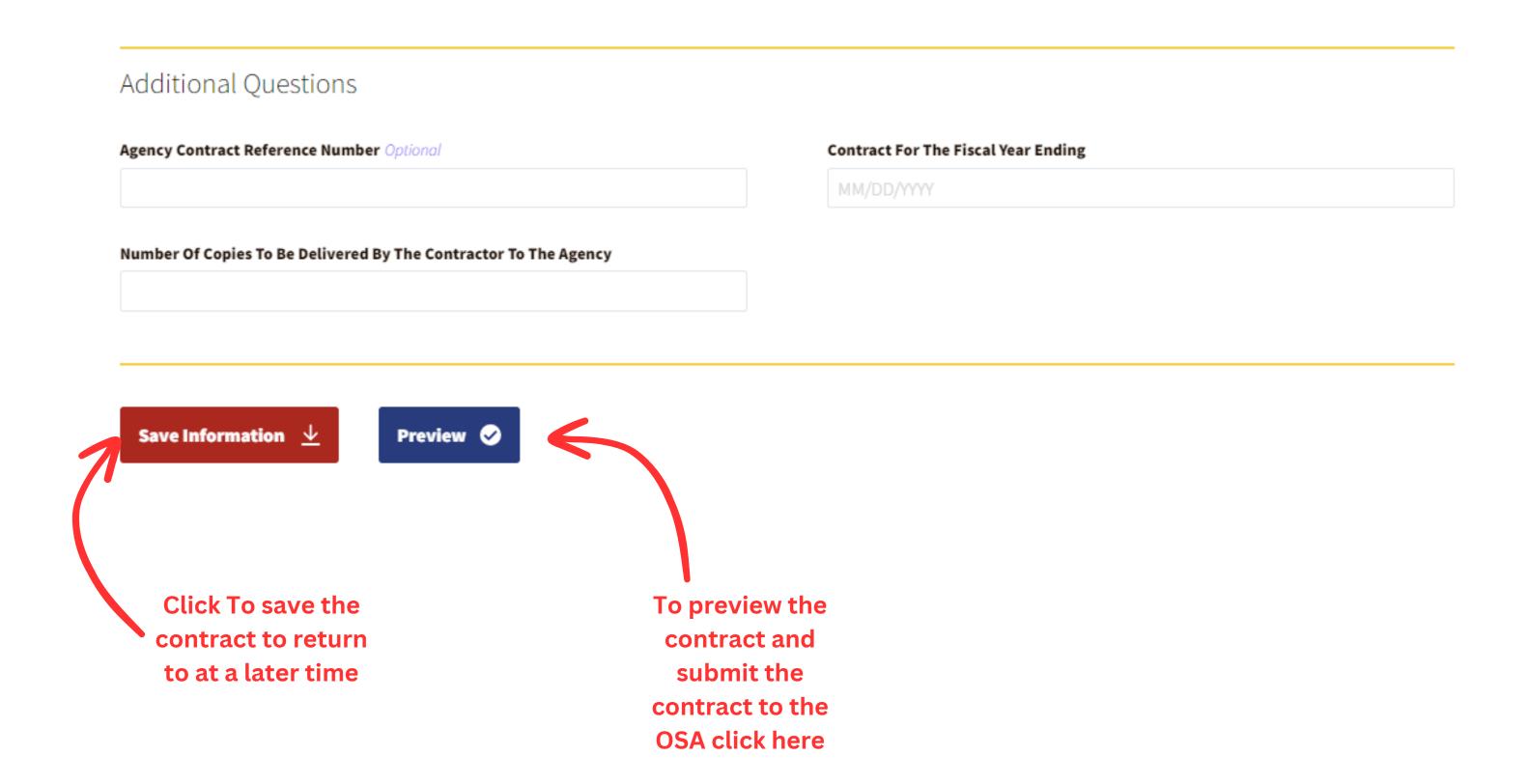
In Section V: Fee and Hour Breakdown, fill out the table accurately using numbers only, without commas.

V. Fee and Hour Breakdown

Do not use commas - numbers only

Category	[Year 1] Hours	[Year 1] Cost
LPB Contract		[\$]
Other		[\$]
SUBTOTAL		[\$] 0.00
Gross Receipts Tax		[\$]
TOTAL	0	[\$] 0.00

In the Additional Questions section, enter the contract's fiscal year ending date, the number of copies needed, and your agency's contract reference number.

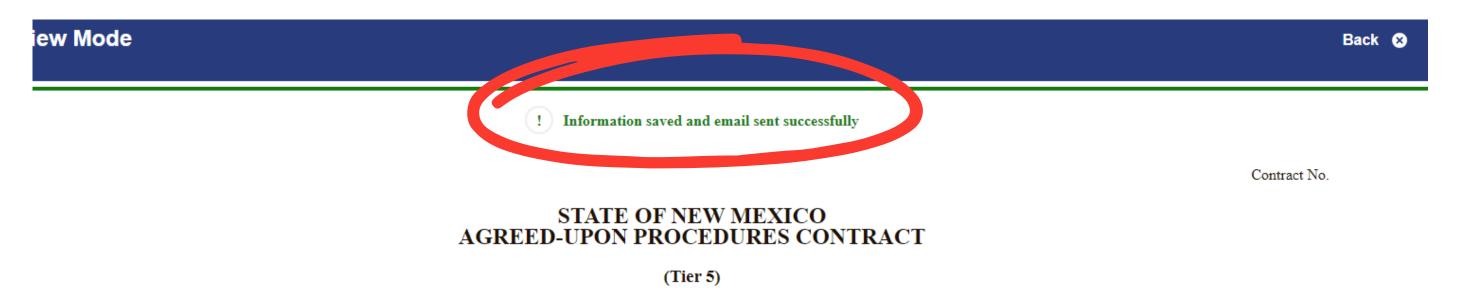


On the preview page, you can review your contract before submitting it to the OSA for review. Click the **Save & Notify OSA** to submit the contract.



The browser will display a green notification indicating the contract was successfully submitted.

Once submitted click on the back button to return to the View Contracts Forms page.



Your Contract will now have a submitted status indicating successful submission to the OSA.

Before you generate a new contract, please check the table below to see if one has already been created. Search: Show 10 ventries Last Updated ^ Fiscal Year v Last Updated By v Status v Audit Report Letter v Action 5/2/2024 11:17:41 AM 2024 Test User Submitted