



## Ohio Checkbook Submission Instructions

Through a partnership between the Ohio Treasurer and the Auditor of State, local governments using UAN can choose to have UAN transmit their checkbook-level transactions to OhioCheckbook.gov in a quick, easy and convenient process. When authorized by the fiscal officer, UAN will use the Annual Financial Report (AFR) data submitted to the Auditor of State (through the Year End submission process) to submit the data to Ohio Checkbook on your behalf.

This is not a UAN requirement; those entities that choose to submit financial information to the Ohio Treasurer can take advantage of this convenient option.

Please note:

- You can authorize a fiscal year through UAN **only after**; closing the fiscal year, submitting the AFR data to UAN, and confirming the submission is successful by reviewing the filing status on the Auditor of State's Customer eServices website.
- If you have already submitted AFR data through UAN for a previous fiscal year, you do not need to resubmit the AFR for that year to begin using Ohio Checkbook authorization.
- UAN **will not** submit any data to Ohio Checkbook without your specific authorization for each fiscal year (previous fiscal years may also be authorized).
- If you have already completed a non-UAN process to submit data for previous fiscal years directly to Ohio Checkbook, you do not need to resubmit those years again through UAN.
- There will be an opportunity to easily edit or redact any information that your entity deems necessary before it posts to Ohio Checkbook. After authorizing UAN to submit the data, the Treasurer of State's office will contact you with instructions for editing and redacting.

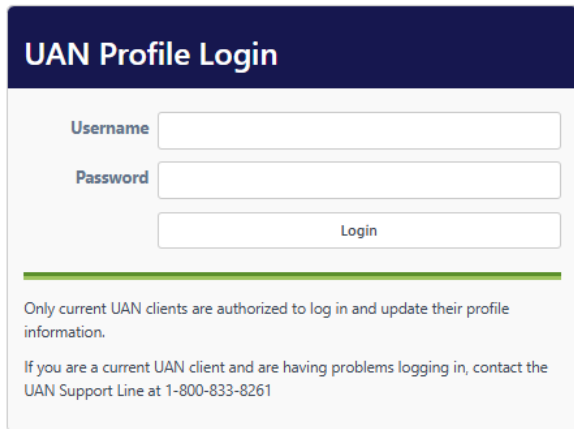
**The following steps will authorize UAN to transmit to Ohio Checkbook, on your behalf, the Annual Financial Report (AFR) data that your entity submitted to the Auditor of State through UAN.**

**Step 1:** Open the UAN website home page by clicking the following link, cut and pasting, or typing it into your web browser: <https://uanlink.ohioauditor.gov>

**Step 2:** Select ‘Profile Login’.

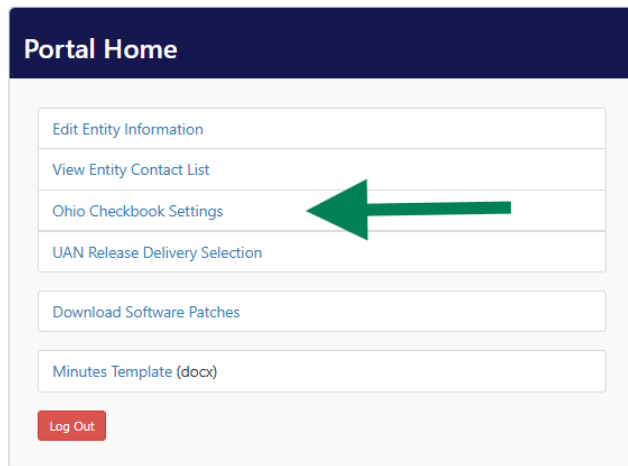
**Step 3:** Enter the username, password and then click ‘Login’.

The 4-digit UAN entity ID assigned to your entity is your username. The 5-character customer number assigned by the Auditor of State’s office, which appears on all AOS invoices sent to the entity, is your password. The letter must be capitalized.



The image shows a web form titled "UAN Profile Login". It features a dark blue header with the title in white. Below the header, there are three input fields: "Username", "Password", and a "Login" button. A green horizontal line is positioned below the input fields. Below the line, there is a small block of text: "Only current UAN clients are authorized to log in and update their profile information." and "If you are a current UAN client and are having problems logging in, contact the UAN Support Line at 1-800-833-8261".

**Step 4:** Select ‘Ohio Checkbook Settings’.



The image shows a web page titled "Portal Home" with a dark blue header. Below the header, there is a list of menu items: "Edit Entity Information", "View Entity Contact List", "Ohio Checkbook Settings", "UAN Release Delivery Selection", "Download Software Patches", and "Minutes Template (docx)". A red "Log Out" button is located at the bottom left. A large green arrow points to the "Ohio Checkbook Settings" menu item.

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**Step 5:** Select the blue ‘Authorize’ button next to the fiscal year that you would like UAN to post financial information to Ohio Checkbook.

## Ohio Checkbook Settings

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Follow the steps below to authorize UAN to submit your entity’s financial data to OhioCheckbook.com on your behalf.

**AUTHORIZE:** Click the Authorize button for each year you want to submit. For each selected year, you’ll be asked to confirm your choice on a confirmation page.

**CONFIRM:** After confirming a year, UAN Support will send a confirmation email containing a unique link to all email addresses currently on file for your entity.

**Note:** *The entity specific link must be clicked via the e-mail for the data to be sent to the Ohio Checkbook.*

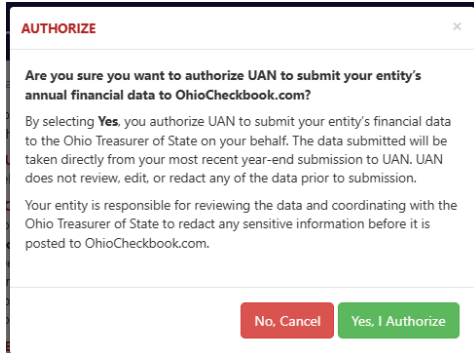
Once the link is clicked, your data will be transmitted to OhioCheckbook.com within approximately 6–10 business days. UAN Support will send a follow-up email confirming when the transmission is complete.

**REVIEW:** After your data has been transmitted, the Ohio Treasurer’s Office will contact you with instructions for reviewing and posting your data on OhioCheckbook.com.

Financial Year	Authorization History	Confirmation History
2019	<a href="#">Authorize</a>	
2020	<a href="#">Authorize</a>	
2021	<a href="#">Authorize</a>	
2022	<a href="#">Authorize</a>	
2023	<a href="#">Authorize</a>	
2024	<a href="#">Authorize</a>	
2025	<a href="#">Authorize</a>	

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**Step 6:** After selecting ‘Authorize’, a confirmation message will open. Read the message carefully. If you choose to continue with the authorization, then click the green ‘Yes’ button.



**Step 7:** The internet browser will return to the Ohio Checkbook Settings window. The year and the date of the authorization will list under the ‘Authorization History’ column in the row of the fiscal year you selected to authorize in Step 5.

**Ohio Checkbook Settings**

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2023	<a href="#">Authorize</a>	
2024	<a href="#">Authorize</a>	
2025	This year was authorized on 4/13/2026	

**Step 8:** UAN Support will send a confirmation message to the entity email address (or addresses) we have on file. The subject line will be ‘UAN - Ohio Checkbook Confirmation’.

*If you do not see the message in your email inbox, please check the ‘junk’ or ‘spam’ folder of your email service.*

**Step 9:** You must respond to the confirmation email before UAN can send the financial data to Ohio Checkbook. Read the message carefully before you decide to respond. There is an internet hyperlink within the email message description. One of the recipients of the confirmation email must click the link and follow the instructions on the window that opens to confirm the submission.

**Please Note:** It does not cause any problem if more than one recipient of the message confirms the submission or if you would like to repeat the confirmation steps for any reason. Repeating the steps will not void the first confirmation or cause any harm.

Example confirmation email:

**UAN Yearly Financial Data Confirmation for the Ohio Checkbook Data**

UAN Customer Number: 0000  
Customer Name: BUCKEYE

UAN has received a request from your entity through the UANlink Profile Login to submit your financial data for 2025 to the Ohio Checkbook. This email has been sent to all current email addresses provided to UAN by your entity. Before UAN can send your financial data, one of the email recipients must confirm this action by clicking on the link below.

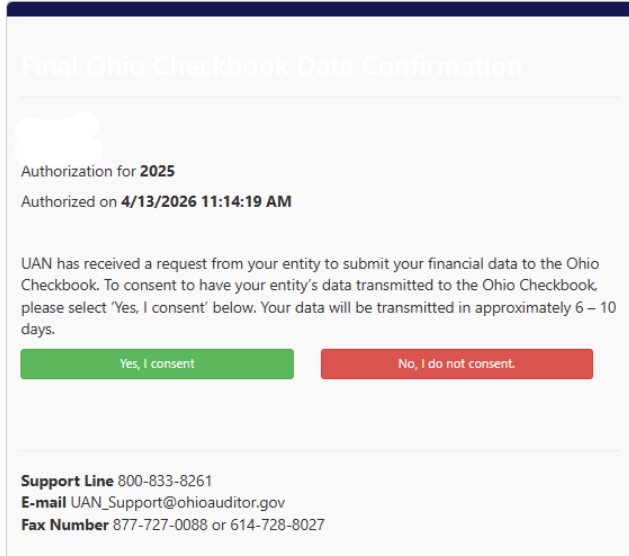
<https://uanlink.ohioauditor.gov/Profiles/Portal/ConfirmAuthorization?uid=BBE30F3191B74A7496AAF91901421D>

By clicking on the link you acknowledge, understand, and agree that when transferring the file from the UAN system to the Treasurer of State, the Auditor of State will not redact any information or item from the file being transferred. Further, I hereby waive, release and forever discharge any claim against the Auditor of State related to the inappropriate release of unredacted material as a result of its transfer to the Treasurer of State from the UAN system.

Once your data has been submitted to the Ohio Checkbook each email address will receive another email confirming the submission. If you feel like this is an error, please contact UAN Support at (800)833-8261.

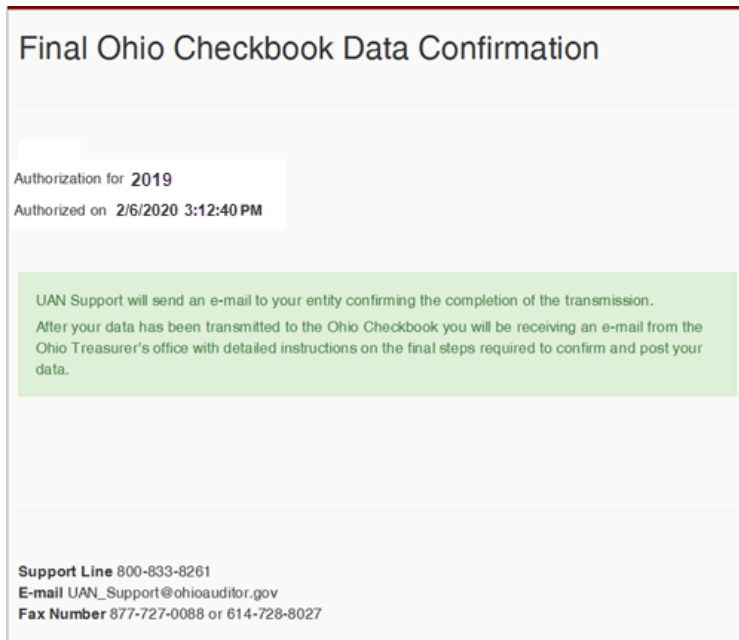
Support Line 800-833-8261  
E-mail [UAN\\_Support@ohioauditor.gov](mailto:UAN_Support@ohioauditor.gov)  
Fax Number 877-727-0088 or 614-728-8027

**Step 10:** Upon clicking the link in the email, a window will open ‘Final Ohio Checkbook Data Confirmation’. Read the message carefully. To consent, click the green ‘Yes, I consent’ button.



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**Step 11:** After selecting ‘Yes, I consent’, a message will explain that you will receive an email from UAN Support after the data has been received by Ohio Checkbook.



This email should arrive within a few business days. Example email:



***Please Note:*** To submit an additional prior year to the Ohio Checkbook, please repeat steps 1 through 10.