



Dave Yost • Auditor of State

Uniform Accounting Network (UAN) clients that have filed their Annual Financial Report (AFR) through UAN for the fiscal year 2013 to the present have the option to authorize UAN to submit financial information for those years to the Ohio Checkbook. Follow the steps below to authorize UAN to do this on your behalf:

Step #1: Click the following link: <http://uanlink.auditor.state.oh.us/>

Step #2: Select 'Profile Login'.

Step #3: Enter your user name and password then click on 'Ok'. Your user name is your four digit UAN entity identification number. Your password is the five-digit Customer Number located on your Auditor of State invoice. Then select the 'Login' button.

Please login to the UAN User Management System

username:

password:

Only current UAN clients are authorized to logon and update their profile information.

If you are a current UAN Client and are having problems logging in, please contact the UAN Support Line at 1-800-833-8261

Step #4: Select 'Ohio Checkbook Settings'.

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- [Ohio Checkbook Settings - New!](#)

Step #5: Select the blue 'Authorize' button for the financial year information you want posted to Ohio Checkbook web site.

Ohio Checkbook Settings

Please follow the below steps to authorize UAN to submit your entity's financial data on your behalf to OhioCheckbook.com:

AUTHORIZE: Click the Authorize button below for each corresponding year. For each year selected, a confirmation page will be shown asking you to verify your selection.

CONFIRM: Upon completing the confirmation for the year selected an e-mail containing an entity specific link from UAN Support will be sent to each e-mail address that UAN currently has on record for the entity. The entity specific link must be clicked in one of the e-mails for the data to be sent to the Ohio Checkbook. The data will be transmitted to the Ohio Checkbook in approximately 6 – 10 business days after the entity specific link is clicked. UAN Support will send an e-mail to your entity confirming transmission of the data to the Ohio Checkbook.

REVIEW: After your data has been transmitted to the Ohio Checkbook, you will be contacted by the Ohio Treasurer's office with detailed instructions on the final steps required to review and post your data.

Financial Year	Authorization History	Confirmation History
2013	<input type="button" value="Authorize"/>	
2014	<input type="button" value="Authorize"/>	

Step #6: After selecting 'Authorized', a pop up message will appear requesting that you confirm the authorization for UAN to send your financial information to Ohio Checkbook. Select the green 'Yes' button to continue.

Authorize? ×

Are you sure that you would like to authorize UAN to send the Ohio Checkbook your yearly financial data? By selecting 'Yes' you are authorizing UAN to submit data from your entity to the Ohio Treasurer of State Ohio CheckBook on your behalf extracted from the latest year end submission provided to UAN. UAN has not reviewed, edited or redacted any data contained in your submission. Your entity accepts the responsibility to review and redact sensitive data in coordination with the Ohio Treasurer of State prior to it being posted to the Ohio Checkbook.

Step #7: You will be returned to the Ohio Checkbook Settings window. The 'Authorization History' field for the financial year selected during Step 1 will indicate that the year was authorized and the date of the authorization.

Ohio Checkbook Settings

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AUTHORIZE: Click the Authorize button below for each corresponding year. For each year selected, a confirmation page will be shown asking you to verify your selection.

CONFIRM: Upon completing the confirmation for the year selected an e-mail containing an entity specific link from UAN Support will be sent to each e-mail address that UAN currently has on record for the entity. The entity specific link must be clicked in one of the e-mails for the data to be sent to the Ohio Checkbook. The data will be transmitted to the Ohio Checkbook in approximately 6 – 10 business days after the entity specific link is clicked. UAN Support will send an e-mail to your entity confirming transmission of the data to the Ohio Checkbook.

REVIEW: After your data has been transmitted to the Ohio Checkbook, you will be contacted by the Ohio Treasurer's office with detailed instructions on the final steps required to review and post your data.

Financial Year	Authorization History	Confirmation History
2013	This year was authorized on 8/11/2016	
2014	Authorize	

Step #8: A confirmation email from UAN Support will be sent to all email addresses we have on file for your entity. The subject line of the email will be 'UAN - Ohio Checkbook Confirmation'. **Please Note:** *If you do not see the email in your inbox, please check the Junk Email folder.*

Step #9: Before UAN can send your financial data to the Ohio Checkbook, you must respond to the confirmation email. Within the confirmation email there is a link. One of the recipients of the confirmation email must click on the link in order to confirm your submission. **Please Note:** *The confirmation submission will not be harmed or voided if more than one person responds to the confirmation email i.e. it is safe to respond again if you are unsure.*



UAN Yearly Financial Data Confirmation for the Ohio Checkbook Data

UAN Customer Number:
Customer Name:

UAN has received a request from your entity through the UANlink Profile Login to submit your financial data for 2013 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.

devsecure/uanprofiles/Portal/ConfirmAuthorization?uid=63017DC1955D46619B0301C767A5324F

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
Fax Number 877-727-0088 or 614-728-8027

Step #10: After clicking on the link, the ‘Final Ohio Checkbook Data Confirmation’ window will appear. To complete the process of submitting your financial year to the Ohio Checkbook, please select the green ‘Yes, I consent’ button.

Final Ohio Checkbook Data Confirmation

Authorization for **2013**

Authorized on **8/11/2016 1:14:51 PM**

UAN has received a request from your entity to submit your financial data to the Ohio Checkbook. To consent to have your entity's data transmitted to the Ohio Checkbook, please select 'Yes, I consent' below. Your data will be transmitted in approximately 6 – 10 days.

Yes, I consent

No, I do not consent.

Support Line 800-833-8261
E-mail UAN_Support@ohioauditor.gov
Fax Number 877-727-0088 or 614-728-8027

Step #11: After selecting the green ‘Yes, I consent’ button, a message will indicate that you will receive an email from UAN Support after your financial information has been received by the Ohio Checkbook. This email should arrive within a few business days.

Final Ohio Checkbook Data Confirmation

Authorization for **2013**

Authorized on **8/11/2016 1:14:51 PM**

UAN Support will send an e-mail to your entity confirming the completion of the transmission.
After your data has been transmitted to the Ohio Checkbook you will be receiving an e-mail from the Ohio Treasurer’s office with detailed instructions on the final steps required to confirm and post your data.

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E-mail UAN_Support@ohioauditor.gov

Fax Number 877-727-0088 or 614-728-8027



UAN Yearly Financial Data for the Ohio Checkbook Data

The following is the status of your submission to the Ohio Checkbook:

<u>Year</u>	<u>Status</u>
2013	Successful

If you have any questions, please contact UAN Support.

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