SAO Client Portal Help

The Client Portal provides an area where local and state governments can interact electronically with our office to submit reports and questions, review and update general, scheduling and contact information and view resources applicable to the government. This document is intended to provide help with performing basic functions within the Client Portal.

Managing Your Account

Once you have logged in to the portal you should see a link at the top left of your screen that says "My Account". Click on this link to manage your account.

On the following page you will be able to update your contact information. You may also change your password or the government which you belong to by clicking on the appropriate links. To deactivate your account click on the link provided.

Confirmed and Unconfirmed Contacts

When you first create your account you will be considered an "unconfirmed" contact. This means that we do not yet know if you actually belong to the government that you specified. An email will be sent to our audit contact for your government with instructions to confirm you as a valid contact. Once you are confirmed you will be able to perform basic functions within the Client Portal such as view government profile information and submit HelpDesk questions.

When creating your account if you are informed that your government does not have an audit contact set or the audit contact has left your government, please contact our office by sending an e-mail to WAStateAuditorSubscriptions@sao.wa.gov or call (360) 725-5599 for assistance.

You can view who your Audit Contact is by going to the Client Portal main page: http://portal.sao.wa.gov/SAOPortal/Default.aspx

Administrative Functions

If you are the audit contact for your government you will be able to perform certain administrative functions such as setting access for contacts within your government, setting audit and executive contacts and confirming contacts as belonging to your government.

Confirming a contact

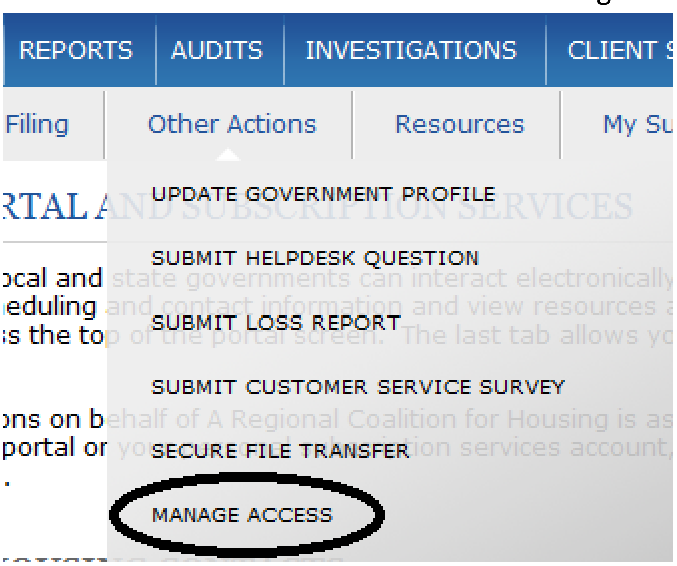
If you lost the instructions in the email you received, you may perform these simple steps to confirm a contact:

1. Go to the Client Portal main page (http://portal.sao.wa.gov/SAOPortal/Default.aspx)
2. Click on the "View Unconfirmed Contacts" link at the bottom of the page.
3. Click on the "Confirm" link next to the contact's name. The contact is now confirmed.

Granting Access to Contacts within your government

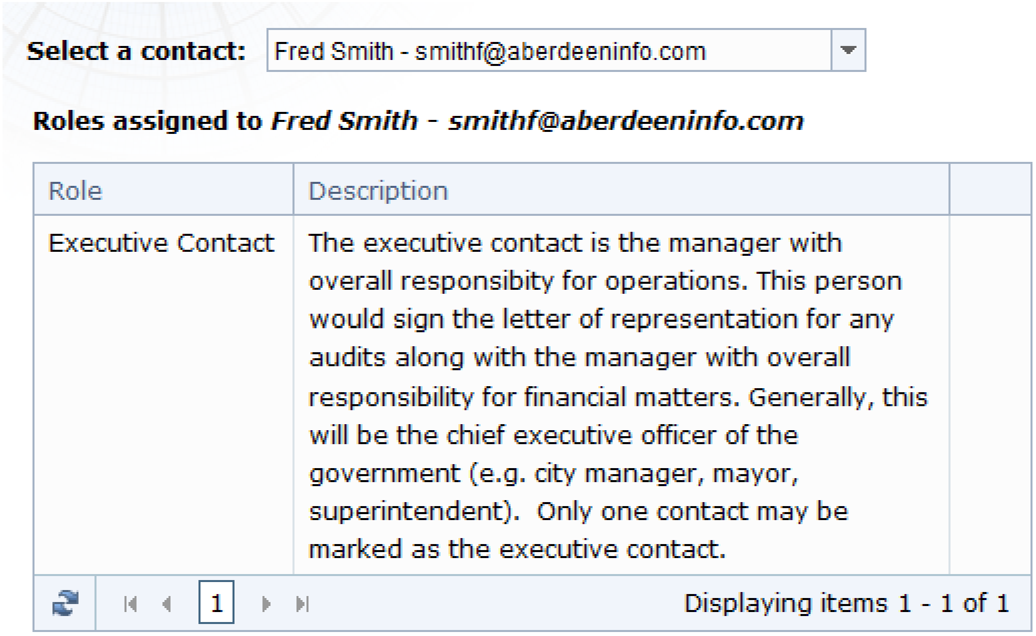
You may wish to grant access for certain contacts within your government so that they may be allowed to perform certain functions. For example you may want one contact to be allowed to submit your annual report each year.

1. From the "Other Actions" menu select "Manage Access"

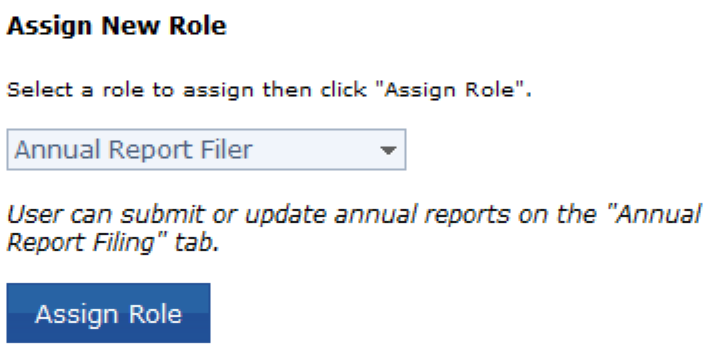


2. Select a contact from the dropdown on the following page.

3. The contacts roles will be listed



4. Under the “Assign New Role” selection select the role you want to assign, for example “Annual Report Filer”. You can view a description of each role by changing the role dropdown. The description will be displayed below the dropdown:



5. Click the “Assign Role” button to assign your selected role. The contact will be able to perform the specified function the next time they login to the Client Portal.

Setting the audit and executive contacts

This process is the same as the 5 steps described in the previous section. You just need to select the appropriate role in the “Assign New Role” section to set these contact types. Note that setting this role will automatically remove the role from the contact it was previously assigned to since there can only be one of these types of contacts.

Disassociating a contact

If a contact no longer works for your government you can disassociate them by following these steps:

1. Go the “Manage Access” page under the “Other Actions” menu.
2. Select the contact from the dropdown.
3. Click on “Disassociate Contact” on the bottom right.

Once a contact has been disassociated, they will no longer have access to the Client Portal for your government. They will also no longer show up under your unconfirmed or confirmed lists of contacts.

Access to Multiple Governments

If you are responsible for multiple governments and need access to perform functions within the Client Portal for those governments, please send an e-mail to WAStateAuditorSubscriptions@sao.wa.gov or call (360) 725-5599 for assistance.

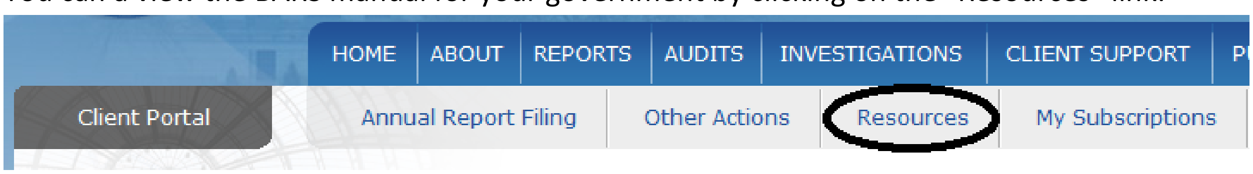
Viewing and Updating Government Profile Information

The government profile page contains information our office uses to perform an audit such as your accountability cycle, fiscal year end, basis of accounting and billing contact. To view the government profile page select “Update Government Profile” from the “Other Actions” menu.

You may request to update your government profile information by clicking on the “notify us about needed changes” link. Enter your updated information in the field provided and then click “Submit Change Request”. An email will be sent to our office with the requested changes.

BARS Manuals and Other Resources

You can a view the BARS manual for your government by clicking on the “Resources” link:



A link to the BARS manual for your government based on the basis of accounting set in your government profile will be displayed. There may also be additional information regarding best practices and other resource links.

Submitting Questions

If you have auditing or accounting questions, please submit a HelpDesk request by selecting “Submit HelpDesk Question” from the “Other Actions” menu.

For questions related to functions in the Client Portal or Subscription Services , send an email to WAStateAuditorSubscriptions@sao.wa.gov .

For questions related to filling your Annual Report, please send an email to LGCSFeedback@sao.wa.gov

Subscription Services

For help with subscription services please visit the following url: http://portal.sao.wa.gov/subscriptionservices/help.aspx

Annual Report Filing

For help with filling your annual report please visit the following url: http://www.sao.wa.gov/EN/ClientSupport/FinancialReporting/LGS/Pages/default.aspx