<table>
<thead>
<tr>
<th>Title</th>
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<tbody>
<tr>
<td>Elevate-Ready PeopleSoft FIN 9.2 Upgrade Launching December 2015!</td>
<td>4</td>
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<tr>
<td>Training Tools and Resources for FIN 9.2</td>
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<tr>
<td>What To Do for FIN 9.2</td>
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<td>Will Your Browser Work with FIN 9.2?</td>
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<td>What is the Role of an Approving Official?</td>
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<td>Management of Property Purchased on Sponsored Awards - Join Us for Training Nov 18</td>
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<tr>
<td>Elevate FIN Upgrade (Monthly Update)</td>
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<td>Key Dates to Focus on Pre-FIN 9.2</td>
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<td>Final PSLite to m-FIN Crosswalk Training - November 19</td>
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<td>Meet the Team: CCO Debt &amp; Asset Management - Property Accounting Office</td>
<td>8</td>
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<tr>
<td>Interview: Andy Settle, CCO Tech Ops Accountant</td>
<td>9</td>
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**Area Accounting | Sponsored Projects Accounting | Debt & Asset Management | Cost Accounting | Technical Operations**
### NOVEMBER 2015

<table>
<thead>
<tr>
<th>Monday</th>
<th>Tuesday</th>
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<tr>
<td>- Check for unposted Oct Journals to correct, approve or delete</td>
<td>- Finance System campus close for Oct 2015 – 6:00 PM</td>
<td>- Oct allocations run and Finance System closes</td>
<td>- CIW is updated with Oct closing entries, Oct statements are ready for review and reconciliation</td>
<td></td>
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<td></td>
<td>- Reminder: Oct JEs must be fully approved prior to 6:00 PM</td>
<td>- All unposted Oct journals will be deleted starting at 10:00 AM - copy them into the next period</td>
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<td>- Gift Expenditure cut-off to make the Nov 6 CUF wire transfer</td>
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<td>- Sales tax documentation for the previous month's sales tax is due from departments. Send to: <a href="mailto:Maggie.Young@Colorado.EDU">Maggie.Young@Colorado.EDU</a></td>
<td>- Gift Expenditure cut-off to make the Nov 13 CUF wire transfer</td>
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<tr>
<td>- Time collection for monthly payroll - 5:00 PM</td>
<td>- Deadline for fully approved expense reports</td>
<td>- Campus Closed - Thanksgiving Day</td>
<td>- Campus Closed</td>
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<tr>
<td>- Creation, validation and dept approval of Nov PETs for Fund 30/31 projects</td>
<td>- HCM unavailable during 9.2 upgrade</td>
<td>- HCM unavailable during 9.2 upgrade</td>
<td>- HCM unavailable during 9.2 upgrade</td>
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<tr>
<td>- Cut-off for Fund 30/31 project journals and Fund 34 gift fund journals</td>
<td>- HCM unavailable during 9.2 upgrade</td>
<td>- Campus Closed - Thanksgiving Day</td>
<td>- Campus Closed</td>
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<tr>
<td>- Gift Expenditure cutoff to make the Nov 30 month-end CUF wire transfer</td>
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### NOVEMBER - DECEMBER 2015

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<td>- HCM unavailable during 9.2 upgrade</td>
<td>- Check for unposted Nov Journals to correct, approve or delete</td>
<td>- Finance System campus close for Nov 2015 – 5:00 PM</td>
<td>- Nov allocations run and Finance System closes</td>
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<td>- HCM unavailable during 9.2 upgrade</td>
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<td>- CU Careers Go-Live in 9.2</td>
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<td>- FIN OUTAGE 5:00 PM - You cannot transact in FIN 8.4 or 9.2</td>
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<td>- All unapproved JEs in PS FIN 8.4 will be deleted at Close of Business</td>
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<td>- Do not create JEs until FIN 9.2 is live</td>
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<tr>
<td>- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2</td>
<td>- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2</td>
<td>- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2</td>
<td>- FIN Go-Live</td>
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<tr>
<td>- CUF Wire Transfer outage</td>
<td>- CUF Wire Transfer outage</td>
<td>- CUF Wire Transfer outage</td>
<td>- Resume business as normal</td>
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- Time collection for biweekly pay period ending Nov 17 - 5:00 PM
- Sales tax documentation for the previous month's sales tax is due from departments. Send to: Maggie.Young@Colorado.EDU
- Gift Expenditure cutoff to make the Nov 30 month-end CUF wire transfer
- Nov allocations run and Finance System closes
- All unposted Nov Journals will be deleted starting at 10:00 AM - copy them into the next period
- Finances System campus close for Nov 2015 – 5:00 PM
- Check for unposted Nov Journals to correct, approve or delete
- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2
- CUF Wire Transfer outage
- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2
- CUF Wire Transfer outage
- FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2
- CUF Wire Transfer outage
- FIN Go-Live
- Resume business as normal

Campus Closed

Campus Closed - Thanksgiving Day

FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2

CUF Wire Transfer outage

FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2

CUF Wire Transfer outage

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CUF Wire Transfer outage

FIN OUTAGE - You cannot transact in FIN 8.4 or 9.2

CUF Wire Transfer outage
What to do before FIN 9.2

Implementation of the Elevate FIN 9.2 software on a scale this large - the entire CU system - is both exciting and challenging. What’s exciting is that this upgrade will streamline accounting efforts, program and project processing, financial transactions management and so much more. What can be challenging is not knowing what’s coming - will this upgrade really make our campus' and our department’s business processes better?

To help you understand what’s coming, we have outlined a few key changes:

What’s Changing?

Award becomes the primary factor in sponsored projects. Previously, you may have had multiple projects under each award which loosely tied back to the overall award. Now, everything is driven by the primary award. In FIN 9.2, you will have a primary award with a main project, which may or may not have multiple activities. You might also have separate projects for subrecipients or participant costs. Each of these may also have multiple activities. The difference is that each of these projects becomes a function of the award which presents a better picture.

Activities become part of your FOPPS attached to the project. At least one activity is required for each project type. You may have projects for cost share, capital construction, financial aid, sponsored projects or loan funds. Activities are only applicable to projects, not programs. How does this affect you? If all you use is SpeedType, the activity should automatically populate. If you enter data using a FOPPS combination, you will need to add an activity to that combination. For the Boulder Campus our default activity is 1, though other activities may also exist. Contact CCO if you need assistance.

Journal Entries, Cash Transfers and Budget Journals are all “journals” in 9.2. Simply select your ledger: “Actuals,” “B_CURR_CONT” or “B_CURR_TEMP.” JEs and cash transfers post to the Actuals ledger; BJEs post to one of the other two ledgers. (Other ledgers exist, though these are the most commonly used.)

For journal lines with projects, additional information is needed: Activity, PC Business Unit = UCB, and an Analysis Type or either GLE (expenses) or GLR (revenue).

Workflow for the Boulder Campus is driven by the Journal Source Code which is tied to your department ID. This allows journals to be automatically routed to approvers within that Journal Source Code. If the standard workflow does not fit your department’s model, contact your Area Accountant to discuss options.

Cost Share Programs are converting to projects. Four new Funds have been designated to ensure compliance with donor intent, sponsor requirements and OU’s funding models. For example, cost share FOPP 10-10519-12345, which supports project 1501234 in Fund 30, will convert to FOPP 12-10519-151234. The use of the same project number allows us to better track all activity associated with a sponsored award. This also supports OU’s decision to not combine programs and projects in the same funds.

Your cost share SpeedTypes will be converted as illustrated below:

<table>
<thead>
<tr>
<th>New Funds</th>
<th>SpeedType Renamed To</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>12xxxxx becomes 12xxxxx</td>
</tr>
<tr>
<td>22</td>
<td>12xxxxx becomes 12xxxxx</td>
</tr>
<tr>
<td>91</td>
<td>134xxxxx becomes 13xxxxx</td>
</tr>
<tr>
<td>7x</td>
<td>17xxxxx becomes 17xxxxx</td>
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</table>

Subcontracts - Will phase out the use of the 600+ account codes that are currently associated with subcontracts. Going forward, SPA will use the Subcontract General Budget Account Code 492500 during award setup. Subcontract SPOs will be processed using 492500 for the first $25,000 and 492601 for over $25,000. This split is made when you submit your invoice for payment in Marketplace.

CIW and Reporting Options will remain in place: mFIN, PSQuery and CW. Changes to CIW table names may impact your internal databases or queries. This includes PSUtil, which will no longer function after go-live.

During the next five weeks it will be critical to spend time preparing for these changes. See What to Do For FIN 9.2 on the next page for ideas.

What to Do For FIN 9.2

Here are a few suggestions to help you prepare:

• Assess your departmental business processes
• Attend Training - Sign up for in-person, hands-on or online.
• Plan for the outage - mark your calendars and identify critical tasks that must be completed before and during the outage.
• Prepare your month-end journals early, particularly any that will require secondary approval. This month’s deadlines are earlier than normal due to the Thanksgiving holiday and the HCM go-live date.
• Please note that any unapproved journals will be deleted prior to the outage. Complete transactions early or hold them until after go-live.
• Print the comprehensive calendar on pages 2 and 3 above.

Please note:

• Campus Close is one hour earlier at 5:00 PM on Dec 2. Concur will remain open and you can submit reports; however, the reimbursements will not be paid while FIN is down.
• New users cannot obtain Concur access during the outage.
• Invoices will be processed in CU Marketplace; however, no invoices will be paid from 12/3 at 5:00 PM through 12/9.
• CU Marketplace invoices due by 12/10 will be paid by 12/3 before 5:00 PM.

To find more information on FIN 9.2, visit:

http://www.colorado.edu/controller/elevate-ready

Where to Get Help After Go-Live

After go-live, Elevate resources will be available on our campus in both the ARC on the East Campus and in the Engineering Center on Main Campus. Precise dates and times will be shared when available.

In the interim, and post-go-live, you are always welcome and encouraged to contact FINProHelp:

303.837.2161

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303.837.2161
The role of the Approving Official (AO) is critical in ensuring the integrity of the rules by reviewing the transactions on a monthly basis. The AO is specifically designed to create a separation of duties (transaction vs. approval). It is part of an internal controls environment.

The PSC's Procurement Card Handbook (http://www.cu.edu/psc/procurement-card-handbook/rules-and-responsibilities) clarifies that:

"The Approving Official (AO) is the individual assigned to the Cardholder to ensure compliance with procurement card policies and procedures. The AO plays a critical role in ensuring the integrity of the procurement card program at the departmental level." [Emphasis added]

The AO's duties include, but are not limited to: ensuring proper documentation is included for each transaction; that the transaction serves a specific business purpose on behalf of the university; and that the tests of propriety contained in the Procurement Card Handbook (http://www.cu.edu/procurement-card-handbook/rules-and-responsibilities) have been met before a transaction is approved. For a complete list of the AO's responsibilities, please see the Procurement Card Handbook. (http://www.cu.edu/psc/procurement-card-handbook/rules-and-responsibilities) Guidance concerning the approval authority of AOs comes from several university sources, including the following:

- Approvers may not approve their own transactions, nor are approvers permitted to approve transactions that provide personal reimbursement for their supervisor. (See Propriety of Expenses APS at http://www.cu.edu/use/aps/0195-propriety-expenses.)
- Every transaction must be approved by an individual having the authority to challenge or seek further approvals for questionable transactions. - Fiscal roles and responsibilities APS (http://www.cu.edu/aps/4014-fiscal-roles-and-responsibilities)
- The OU Boulder Campus Handbook supports this standard of rigorous internal controls by providing further authoritative guidance on the selection of AOs. Read more on the CCO website under Policies & OU Boulder Campus Controller's Office. (http://www.colorado.edu/ controller/approving-officials-procedural-statement)
- The AO plays a critical role in ensuring the integrity of the procurement card program at the departmental level. (Emphasis added)

If you have questions regarding the role of an Approving Official, please contact:

Sonida Payne, Commercial Card Program Specialist, at 303.764.3480, email: Sonida.Payne@cu.edu

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Below is a quick snapshot of some of the most critical dates you will want to keep in mind as we get closer to FIN 9.2 go-live:

**Elevate FIN Upgrade**

The launch of FIN 9.2 for both HCM and FIN have been delayed until December 3 and 10, respectively.

**Testing - Round 3**

The current round of testing is in progress and will continue for the additional time we have been provided.

**Data conversion and review is in progress and remains an interactive process.**

**User Acceptance Testing (UAT) is underway and will continue through November.**

**End-user training is now available.**

**CIW Testing**

The CIW test environment is now available. Please test your shadow systems, access databases and portals.

**CIW Changes and Updates**

A Crosswalk of changes can be found at: https://content.cu.edu/CIU/loyer/it/dhwshe/2300/CIW/CIW.dat

A recorded webinar highlighting the changes is also available at: https://www.cusys.edu/uc/CIU/loyer/CIW/webinar_recording_042015.html

**Key Dates to Focus on Pre-FIN 9.2**

Below is a quick snapshot of some of the most critical dates you will want to keep in mind as we get closer to FIN 9.2 go-live:

**Elevate FIN 9.2 - Key Dates and Deadlines**

- **Mon Nov 16**
  - Cut-off for Nov Fund 30/31 PEIs
- **Mon Nov 23**
  - Cut-off for Nov Fund 30/31
- **Wed Dec 2**
  - All Nov JEs must be entered and approved
- **Wed Dec 2**
  - Campus Close for Nov 2015
- **Thu Dec 3**
  - All unapproved journals in 9.4 will be deleted
- **Thu Dec 3**
  - New allocations run
- **Thu Dec 3**
  - HCM Go-Live in 9.2
- **Thu Dec 3**
  - 50% Crosswalks: 9.2 vs. 8.4

**5:00 PM Thu Dec 3**

- **Week Dec 9**
  - Outage - You cannot transact in FIN 8.4 or 9.2

** Fri Dec 4**

- 9.2 reports ready for review/recordation

**Thu Dec 10**

- FIN 9.2 system is live - resume business

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**CIW Team has office hours on Wednesdays and Fridays from 8 AM - Noon.**

**Contact your department’s IT manager if you have questions regarding your browser.**

**m-FIN Reports**

In the past few months, there have been significant improvements to m-FIN. Many of the reports you requested have been created. If you have submitted a request and have not received any communication or details regarding that request, please let Laura know and she will help facilitate access.

**Browser Compatibility**

Be sure your browser is compatible with FIN 9.2. Check this site for details on supported configurations. You might need to update your browser prior to Go-Live to ensure you are able to access FIN 9.2.

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**Final PSLite to m-FIN Crosswalk Training November 19**

PSLite to m-FIN Crosswalk training will be held November 19 from 1:00 to 2:00 PM in the UMC, Room 247. In this session, you will learn about the m-FIN platform, get tips and tricks and understand the Crosswalk in more detail as we prepare for the upgrades.

RSVP: Controller.Training@Colorado.EDU

**m-FIN Financial Statements Training November 18**

m-FIN Financial Statements Training is available! Join CCO and learn how to access the Cognos Reporting System, plus how to read m-FIN statements.

The class will be held November 18 – 9:00 AM - Noon. Class will be held on the East Campus - Marine Street Science Center (MSSC), 3125 Marine Street, Room W179.

To register, contact Controller.Training@Colorado.EDU

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**Management of Property Purchased on Sponsored Awards Join Us for Training November 18**

Justin Mack and Rebecca Stossmeister, OCG Compliance Team, will be hosting a training on sponsored projects property management on November 18th from 9:00-11:30 in ARC 620. This is the third training segment of the Department Property Manager Certification program that is organized by the Debt and Asset Management team in the Campus Controller’s Office.

**Topics covered in the training session will include:**
- Definitions of property and proposal development tips
- Award terms and conditions for property
- Sponsor requirements for purchasing, management and use
- Award property closeout

This session will include an overview of where to find additional resources for sponsored projects property management on the OCG webpage, in the Boulder eRA database and using Cognos reports; and provide more on scenarios and real-world applications of these concepts in our work in research administration.

To register for this training, please send an email which includes your employee ID and contact information to: Controller.Training@Colorado.EDU

If you have any questions about the training, please contact Rebecca Stossmeister@Colorado.EDU. We look forward to seeing you November 18th.
Campus Controller’s Office Debt & Asset Management - Property Accounting Office

CCO Debt & Asset Management Team is comprised of four sub-units within General Accounting. For the next two months, we are highlighting the team which monitors the accounting activities of approximately 500,000 transactions related to capital construction, bonds, capital equipment purchases and disposals, gift cards, petty cash and change funds, ACH and Demand Warrant cancellations, PIE interest charges and the depreciation of capital assets. Many of these activities have corresponding accounting transactions within the state’s CORE accounting system.

This month the focus is on the Property Accounting Office Team (PAO), which consists of Jeanne Connely@Colorado.EDU and Melissa.Keller@Colorado.EDU. Property Central is the home of all things related to capital equipment on campus. Visit our site at: http://www.colorado.edu/Property.

Melissa Keller’s role is to serve as our campus’ capital equipment gatekeeper by monitoring new equipment purchases within the $1000 accounts approximately 10 or more 50000 account codes which may have purchases that should be capital but were entered in an incorrect account code. She reviews 1000+ transactions per month to find the 75 capital items and 300 fabrication components ($1.7 million avg per month) that need to be entered into PeopleSoft Asset Management (PSAM). You can imagine a lot of questions come up as she determines whether or not an item is eligible as a capital equipment tag. We need information such as: where the item is located; who is responsible for the item; what funding was used to purchase it; and, when may we schedule a time to tag it. She cannot accomplish this without the support of departmental purchasing staff and principle investigators. We appreciate quick responses so items may be tagged as fast as possible, per sponsor guidelines.

Jeanne Connely’s many roles begin once the items are entered into PSAM. She oversees the tagged items’ remaining life cycle. Jeanne coordinates with 149 Departmental Property Managers, to manage the two-year inventory cycle of our 10,349 equipment tags valued at $262,746,449 (as of Fall 2015). Campus departments are divided up within eight quarters and each inventory takes roughly 3 months to complete the entire process. The initial inventory can take up to 6 weeks; then it is certified by Jeanne after a double check of the inventory process; and finally, all changes are recorded. One-third of CU’s tags move within the two-year cycle making them sometimes tricky to find.

A department may request one extension of time in which to complete their inventory. However, if it is not completed and certified after the extension, the inventory is considered un uncertified and the department has to start over. Why so strict? An inventory is required to be a snapshot in time not a video over a five-month period per GAAP and GASB guidelines.

When a new PI transfers to our campus, she/he usually brings equipment and Jeanne works with the department heads to receive the equipment, determine if it needs to be capitalized, and sends an acceptance email to the PI’s prior institution. She also handles the opposite when a PI leaves CU. Please note that Jack Brubaker in Property Services has to authorize the release of some of our awards. Wanting to get more accounting experience and learn all of the accounting aspects involved at the university, I applied for my current position with CCO. I am extremely happy to be here and grateful for the opportunity. I am learning so much and am happy to be in a department filled with great and knowledgeable people!

What do you view as the greatest opportunity within this role? I think my greatest opportunity here is to learn the university’s accounting practices and become even more knowledgeable in many facets of accounting. Furthermore, sharing my time between Technical Operations and Area Accounting gives me an even greater opportunity to learn more about how these two units serve the university.

What best practices would you share with the departments? Being new to the department, I would encourage the best practice of monitoring and balancing departmental funds and SpeedTypes on an ongoing basis. This ensures all funds are being paid appropriately, and the balances of those funds are known and correct.

On a personal note, what do you enjoy doing outside of CCO? Outside of CCO to stay sane, I play hockey (roller and ice), dance hip hop and salsa, play guitar, write songs and do yoga. Also, I like to go to concerts and see live music at the many great venues in Colorado.

I also like to spend time with my family and friends and try to keep up with my 12 year old daughter, who someday, in college will actually realize I’m cool - but I’ve got a while to wait for that!

Please tell us about your prior experience and what brought you to CCO? My prior professional experience is mainly in financial aid. I worked as a work-study student in financial aid at CU while I pursued my bachelor’s degrees in Business Administration and Spanish. After graduating, I got a job as a financial aid counselor at Metro State College, where I worked for two years, until my prior boss at CU called and asked if I wanted to come back to CU’s Financial Aid office. I returned to CU and worked in financial aid for 11 years working in all aspects of processing, including accounting and reconciliation of some of our awards. Wanting to get more accounting experience and learn all of the accounting aspects involved at the university, I applied for my current position with CCO. I am extremely happy to be here and grateful for the opportunity. I am learning so much and am happy to be in a department filled with great and knowledgeable people!

Get to know Andy a little better in our brief interview below.

What do you view as the greatest opportunity within this role? I think my greatest opportunity here is to learn the university’s accounting practices and become even more knowledgeable in many facets of accounting.

Furthermore, sharing my time between Technical Operations and Area Accounting gives me an even greater opportunity to learn more about how these two units serve the university.

What best practices would you share with the departments? Being new to the department, I would encourage the best practice of monitoring and balancing departmental funds and SpeedTypes on an ongoing basis. This ensures all funds are being paid appropriately, and the balances of those funds are known and correct.

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