Financial Operations
Announcements
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DART Planned Giving – Allocations for Bequest Intentions

- Units all over campus were asked to provide allocations/shortcodes for all existing Bequest Intentions and Life Income gifts
- Potentially thousands of requests
- Sooner is better
- Alternative
  - Setting up a “Catch-all” shortcode for these and going back to work on them over time. If Development establishes these, they will have no chartfields associated with them. It will just be a shortcode and name.
New/Changed Internal Reviews

• Internal Reviews are queries and analysis done monthly to review University Accounting Data for accuracy

• Scholarship Class with Salary
  – Typically no salary should happen at a Scholarship Class
  – Common errors include GSIs and GSRAs

• Class 73000 being used for activity other than transfers
  – Renovations by Schools and Colleges should be at class 71000.
  – Renovation by Central Plant Department (AEC) should use class 71200.
Partnership Meetings

- Historically FinOps used to meet with Schools/Colleges/Campuses quarterly as a group at the tower
  - Gave people an opportunity to ask questions and hear about potential changes in advance of them rolling out
  - Disbanded around the 4-5 years ago in favor of the FinUL meetings
  - Interest in going back to this or do the FinUL meetings work?