## Key Administrator Finance Orientation Agenda

### LSA Organizational Charts
- Associate Dean for Budget Org Chart
- Dean’s Office Org Charts

### Finance Team Contact Information & Duties
- Finance Team Website
- Finance Team Staff List
- LSA Budget and Finance Team Job Duties

### LSA Units, Key Administrator, and Chair & Director Information
- LSA Departments & Units
- LSA Key Administrator Website
- Key Administrator List

### Financial and Chartfield Information
- LSA Financials 101 (includes Chartfield Definitions and financial structure for UofM and LSA)
- LSA Program Use Chart
- Financial Operations Chartfield Information
- ICRX Policy (last page is a summary of when and what should be flagged with an ICRX Class)
- Valid Account Listing and Transfer Account Matrix

### Budget and Financial Reports
- LSA Admin Portal
- LSA Management Reporting System (MRS)
- Appropriation Details (MRS\Budget)

### Policies and Procedures
- LSA Policies and Procedures
- LSA Financial Oversight Guidelines
- Provost Discretionary Funds Policy
- Budget Instructions (MRS \ Budget \ Budget Materials)
- University Standard Practice Guide – useful SPGs include: Business & Financial Services; 507.10-1: Travel and Hosting; 514.04: Tech Tools; 507-01: Procurement; 201-04: Summer Appointments

### Financial Certification
- Internal Controls
- Matrixes and Written Procedures Templates
- Unit Certification (in M-Reports)

### Other Useful Resources and Links
- LSA Key Administrator Website (Resources)
- Financial Operations
- Procurement Services
- Other Resources - http://www.lsa.umich.edu/facstaff/budgetandfinance/resourceslinks