Chief Administrator Finance Orientation Agenda

LSA Organizational Charts

- Dean’s Office Org Charts
- Budget & Finance Org Chart

Finance Team Contact Information & Duties

- Finance Team Website
- Finance Team Staff List
- Overview of Roles & Responsibilities
- LSA Business Analyst - Menu of Services

LSA Units, Key Administrator, and Chair & Director Information

- LSA Departments & Units
- LSA Chief Administrator Website
- Chief Administrator List
- Sharepoint for LSA Chief Ad Group (LKAG)
- LKAG Documentation (Sharepoint)
- Chair & Director 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)
- Wolverine Access Reporting (Faculty & Staff)
- Business Objects (Unit Maintained > College of LSA)
- M-Reports (Sponsored and All Funds)

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)
- SPG 500.01 Fiscal Responsibilities
- Conflict of Interest/Conflict of Commitment
- Statement on Stewardship
Other Useful Resources and Links

- [LSA Chief Administrator Website](http://lsa.umich.edu/lsa/faculty-staff/budget-and-finance/resources--links-.html) (Resources)
- Financial Operations
- Procurement Services
- Other Resources - [http://lsa.umich.edu/lsa/faculty-staff/budget-and-finance/resources--links-.html](http://lsa.umich.edu/lsa/faculty-staff/budget-and-finance/resources--links-.html)

- [Information and Technology Services (ITS)](http://lsa.umich.edu/lsa/faculty-staff/budget-and-finance/resources--links-.html)
- ITS MyLINC Training
- [Online Access Request System (OARS)](http://lsa.umich.edu/lsa/faculty-staff/budget-and-finance/resources--links-.html)