

Financial Guidelines & Training Updates

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Financial Guidelines

Budget Transfers

Updated

- For clarity
- Operating expense budgetary account names



Monitoring Plan for Segregation of Duties and Review of Financial Activity

SAHARA process: Now called **financial reviews** instead of reconciliations

Clarified the parties involved in internal controls

Simplified the Quality Assurance Reviews section

One Card Program

One Cards may be used for de minimis employee awards only

For the de minimis definition, see the [Employee Awards, Gifts and Prizes](#) guideline

Further changes coming soon
(bank transition, etc.)



Training

Training updates

Introduction to Monthly Reconciliation

- Migrated to new format
- Content and reconciliation language are subject to future review/revision

In progress

- One Card (substantive updates including bank transition)
- Business-related hospitality and entertainment (substantive updates, part of the BEHR form project)



Which Training is for
Me?

Questions?