2:10 pm  Tuesday, March 23, 2021
Automated JE Approvals
This session will provide a review of the Automated Journal Entry Approval process and the debut of the journal entry website. This breakout session will include a time for discussion and questions from the audience.

3:10 pm  Tuesday, March 23, 2021
State Funds Presentation
The University Budget Office monitors, provides leadership, oversight, and support with regard to the execution of State appropriated funds and most Institutional Trust Funds (ITF). State funds begin with 111 and 112. ITFs begin with 12, 14, or 31. The following topics will be reviewed and discussed: Banner FOAPAL, Budget Pool Account Codes, Budget Roll Process, Permanent Budget, Buy-out Form, Fund 111103, Use of Lapsed Salary Funds, Budget Quarterly Review/Reconciliation, and ECU Spending Guidelines.

4:10 pm  Tuesday, March 23, 2021
Foundation Funds Overview
The purpose of this session is to review the wide range of topics involving the use of Foundation funds. Topics will include the following:
- Purpose of the Foundations
- Expenditure policies, including required approvals
- Fund purposes and available funds
- Use of ProCard for foundation funds
- Scholarships, prizes and awards, including the use of Academic works
- Office of Gift Records, including deposit procedures for gifts/sponsorships, fundraising, credit card data/machines, sales tax, and Ustores
- Endowments

9:20 am  Wednesday, March 24, 2021
Relax and Recharge – Employee Wellness with Katelyn
Join ECU CRW’s Fitness Coordinator Katelyn Cook for a chance to relax and recharge throughout the workday. You will be introduced to different exercises that can be completed at your desk throughout your workday to keep you feeling refreshed and energized. As well, you will be introduced to a variety of different employee wellness offerings provided by Campus Recreation and Wellness.
2021 Financial Services Workshop
Tuesday, March 23, Wednesday, March 24, Thursday, March 25
Breakout Session Descriptions

9:45 am  Wednesday, March 24, 2021
Chrome River ProCard Demo
Update from the “Roaring Rapids” of Chrome River. Lead off with a current stats from the first 6 months as well an overview and some of the internal challenges within CR. Next will cover some of the “Common Challenges” that are happening with users and navigation strategies. Tips and Tricks will be shared to help save time and keystrokes for end users from the new Itemization tiles, to duplication are just two that will be shared. Finally, what reports are available in Chrome for departmental use and management decisions. Of course, plenty of time for “real world” questions and answers to complete the 50-min session.

10:45 am  Wednesday, March 24, 2021
ORA ~ Office of Research Administration Update
This session will focus on the multiple updates, modifications and changes in research administration processes, including the new training programs available for all ECU personnel.

New processes to be aware of:
- Letter of intent for subrecipients
- Changes in data collection in eTRACS
- Designation of department personnel associated with tasks in proposal submission and grants management
- A tour of the ORA process and policy website
- Update on training being developed
- Expanding the Hub meeting to the Research Administration Information Network (RAIN) – expanding inclusion and feedback – Come join us!

11:30 am  Wednesday, March 24, 2021
Sponsored Programs Management Topics
This session will be an annual update of new and updated management tools and processes designed to make sponsored program management easier and more efficient. These sessions are a mix of various topics, guidance, and just plain basic information. Hope you enjoy!

This year’s update features a discussion on multiple new sponsored program management reports designed to identify potential fiscal issues that should be addressed on a monthly basis, well before they become compliance problems. Reports include:
- identifying projects potentially under or overspent, based on project end dates
- reviewing charges that auditors may question, or which may require further justification
- identifying charges in the last 90 days of a project that should be reviewed (example – equipment)

revised by P Doughtie 3/9/2021
Breakout Session Descriptions

- using reports to identify projects with cost sharing
- using reports to identify projects with subrecipients
- results in modifying the effort reporting processes- Feedback and Comments are welcome.

**2:10 pm  Thursday, March 24, 2021**

**Sensitive Data Compliance**

Often, we hear information described as confidential, private, and sensitive. This session will define personal and business information that must be protected from unauthorized access to safeguard the university and individuals, including students, employees, and patients. Presentation topics include HIPPA data training, PCI Compliance, FERPA, and sensitive data in Finance.

**3:10 pm  Thursday, March 24, 2021**

**ITF Overview/F&A Report Overview**

There is a better way to manage your ITF funds. We will show you how!

- Discussion and demonstration of various techniques and tools to manage your ITF funds.

**4:10 pm  Thursday, March 24, 2021**

**Protecting the Pirate Treasure ~ Fraud, Risks, and Internal Controls**

In this session the Internal Audit team will talk about internal controls and some recent fraud and misuse incidents that have occurred at the University. They will also talk about steps that could have been taken to prevent these incidents, or to detect them sooner to protect the resources of the University.