PeopleSoft User Group

November 08, 2017

User Group Agenda

- 2018 FASB Update
- Budget Process and Uploads
- Year End Preparation
- 1099 Electronic Filing Prep
- Journey To Excellence Submission
- Semi Annual SE User Review

2018 FASB Update

- Changes to local council “audit format” financial reports in PeopleSoft Financials to comply with new FASB Accounting Standards Update – Financial Statements of Not-for-Profit Entities—Effective for Calendar Year 2018

2018 FASB Update

- Effective 12/15/2017 (For 2018 audits)
- Consolidate investment income, gains, and losses into one-line item, “investment return – net”.
- Present summary information on reclassifications of net assets on the statement of activities showing three major categories (program, time, and appropriation)
- Collapse net asset classes (and the changes therein) to “net assets without donor restrictions” and “net assets with donor restrictions”.
- Correct capitalization of line descriptions on layouts in line with industry standards/FASB examples.

2018 FASB Update

Statement of Fina Pos

Current

Other Non Current Liabilities	104,000	80,000					104,000	80,000
Total Non-Current Liabilities	104,000	80,000	1,774,800	2,029,881			1,878,800	2,109,881
TOTAL LIABILITIES	**532,088**	**486,434**	**1,942,022**	**2,188,328**	**500**	**500**	**2,474,611**	**2,675,262**
Net Assets								
Unrestricted Net Assets	567,695	241,079	5,570,216	5,896,587	125,250	237,937	6,263,160	6,375,603
Temporarily Restricted Net Assets	265,575	114,840	168,090	36,090			433,665	150,930
Permanently Restricted Net Assets					2,278,425	2,260,888	2,278,425	2,260,888
Total Net Assets	833,270	355,919	5,738,305	5,932,677	2,403,675	2,498,825	8,975,251	8,787,421
TOTAL LIABILITIES AND NET ASSETS	**1,365,358**	**842,354**	**7,680,328**	**8,121,005**	**2,404,175**	**2,499,325**	**11,449,861**	**11,462,683**

New FASB

Other noncurrent liabilities	104,000	80,000					104,000	80,000
Total noncurrent liabilities	104,000	80,000	1,774,800	2,029,881			1,878,800	2,109,881
Total liabilities	**532,088**	**486,434**	**1,942,022**	**2,188,328**	**500**	**500**	**2,474,611**	**2,675,262**
Net assets:								
Without donor restrictions	567,695	241,079	5,570,216	5,896,587	125,250	237,937	6,263,160	6,375,603
With donor restrictions	265,575	114,840	168,090	36,090	2,278,425	2,260,888	2,712,090	2,411,818
Total net assets	833,270	355,919	5,738,305	5,932,677	2,403,675	2,498,825	8,975,251	8,787,421
Total liabilities and net assets	**1,365,358**	**842,354**	**7,680,328**	**8,121,005**	**2,404,175**	**2,499,325**	**11,449,861**	**11,462,683**

2018 FASB Update

Statement of Activities

Current

Other Revenue	173,098	165,408	4,000	1,811	0	0	177,098	165,408
Total Revenue	**2,149,991**	**1,933,750**	**4,000**	**1,811**	**-65,036**	**-41,325**	**2,088,955**	**1,894,236**
Net Assets Released-All								
Net Assets Released FOS	75,261	110,554	-	-	-	-	75,261	110,554
Net Assets Release Spec Events	2,500	-	-	-	-	-	2,500	-
Net Assets Released United Way	30,570	31,000	-	-	-	-	30,570	31,000
Total Net Assets Released from Restriction	108,331	141,554	-	-	-	-	108,331	141,554
Total Support and Revenue	**4,151,539**	**3,782,949**	**155,675**	**428,258**	**-65,036**	**-41,325**	**4,242,178**	**4,169,882**

New FASB

Other revenue	173,098	165,408	4,000	1,800	0	0	177,098	165,408
Total revenue	**2,149,991**	**1,933,750**	**4,000**	**1,811**	**(65,036)**	**(41,325)**	**2,088,955**	**1,894,236**
Net assets released from restrictions:								
Satisfaction of program restrictions	2,500	0	0	0	0	0	2,500	0
Expiration of time restrictions	105,831	141,554	0	0	0	0	105,831	141,554
Satisfaction of equipment acquisition restrictions								
Appropriation from donor endowment and subsequent satisfaction of any related donor restrictions	0	0	0	0	0	0	0	0
Total net assets released from restriction	**108,331**	**141,554**	**0**	**0**	**0**	**0**	**108,331**	**141,554**
Total support and revenue	**4,151,539**	**3,782,949**	**155,675**	**428,258**	**-65,036**	**-41,325**	**4,242,178**	**4,169,882**

Budget Preparation

- Chapter 14 of the user guide
- Recorded webinar on Finance Impact Site www.scouting.org/financeimpact
- Tools available
  - Queries
    - LC_ACTUAL_SPREADSHEET_FIS_YR
    - LC_BUDGET_FISCAL_YR – the starting point for budget
  - Report
    - Detail Budget Analysis – Scope
      - Run for 12-31-17
      - Provides current plus 2 years of history and budget

Actual Spreadsheet

LC_ACTUAL_SPREADSHEET_FIS_YR - Actual Spreadsheet-Fis Year

Business_Unit: [redacted]

Year: 2017

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (408 kb)

View All

	Unit	Fund	Account	Project	Class	Account Descr	Project Descr	JAN	FEB	MAR	APR	MAY	JUN
201	[redacted]	1	8103	017	20	Supplies-Program	Merit Badge University	0.000	32.220	0.000	0.000	0.000	0.000
202	[redacted]	1	8103	031	20	Supplies-Program	Great Yukon Race	354.710	0.000	0.000	0.000	0.000	0.000
203	[redacted]	1	8103	040	20	Supplies-Program	Spring Camporee	0.000	0.000	0.000	0.000	288.790	0.000
204	[redacted]	1	8103	040	99	Supplies-Program	Spring Camporee	0.000	0.000	0.000	308.600	0.000	0.000
205	[redacted]	1	8103	042	20	Supplies-Program	National Jamboree	0.000	0.000	0.000	0.000	2316.270	-2316.270
206	[redacted]	1	8103	042	99	Supplies-Program	National Jamboree	0.000	0.000	0.000	0.000	0.000	0.000
207	[redacted]	1	8103	050	99	Supplies-Program	FOS	0.000	399.960	0.000	0.000	154.550	0.000
208	[redacted]	1	8103	070	20	Supplies-Program	Brick Campaign	0.000	0.000	0.000	0.000	0.000	120.000
209	[redacted]	1	8103	078	20	Supplies-Program	Spring Ox Roast	0.000	0.000	0.000	0.000	3790.000	0.000
210	[redacted]	1	8103	078	99	Supplies-Program	Spring Ox Roast	0.000	0.000	0.000	0.000	-3790.000	0.000
211	[redacted]	1	8103	122	20	Supplies-Program	Pierpont Scout-O-Rama	0.000	0.000	150.000	0.000	0.000	0.000

Starting Your Budget

LC_BUDGET_SPREADSHEET_FIS_YR - Budget Spreadsheet - Fis Year

Business_Unit: [redacted]

Year: 2017

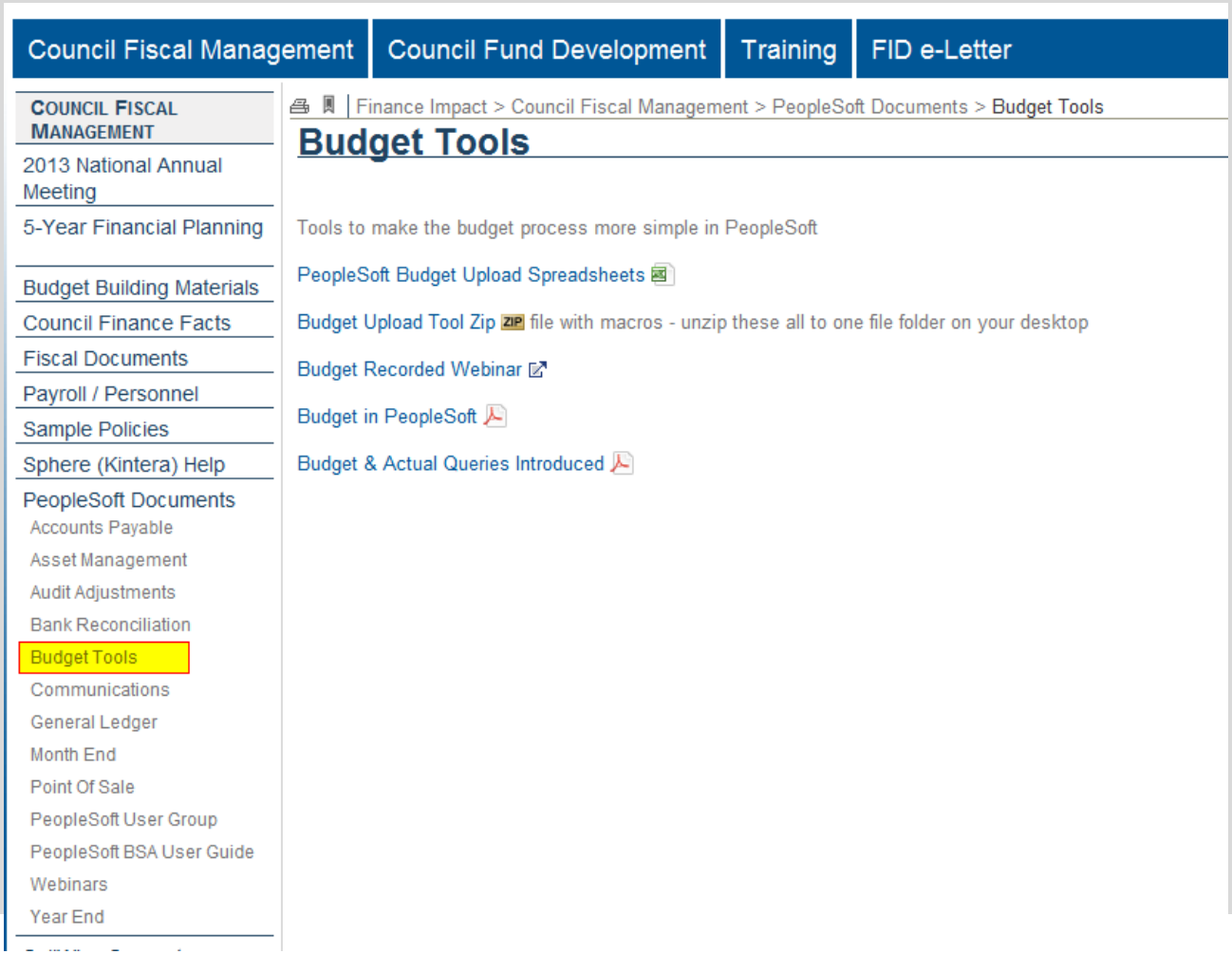
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (152 kb)

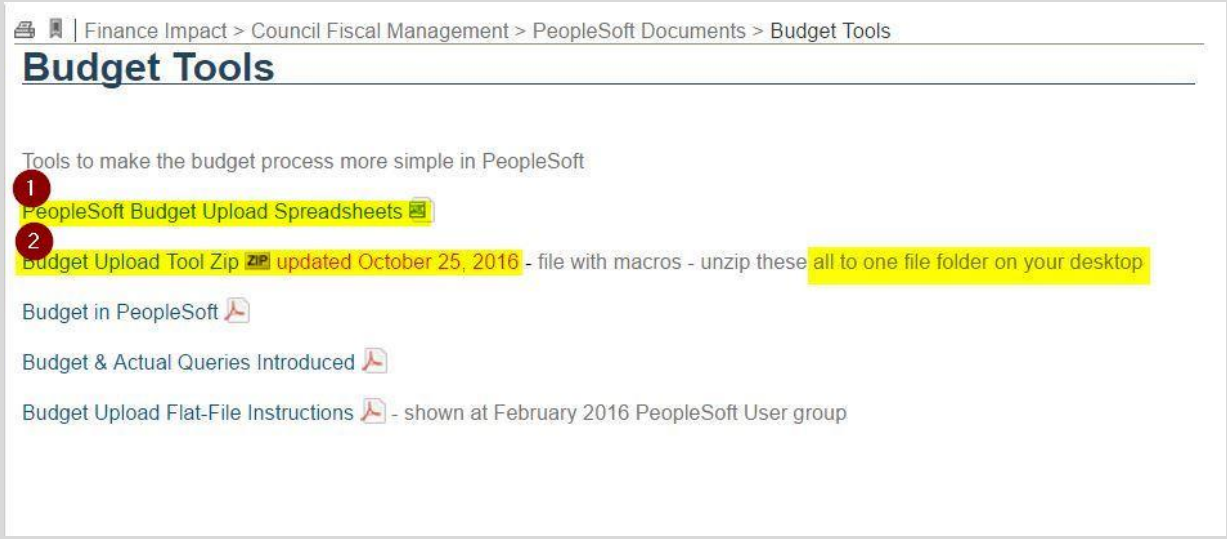
View All

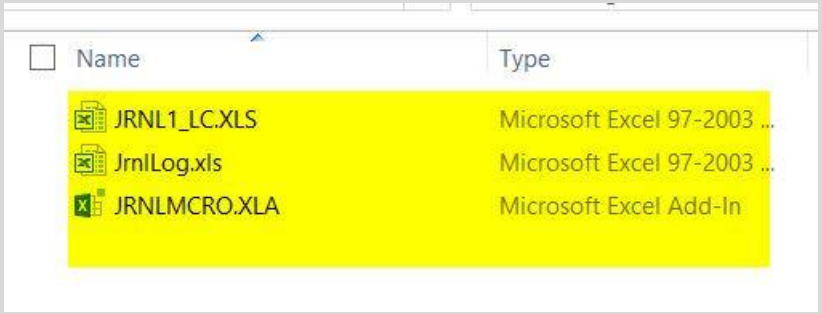
	Unit	Fund	Account	Project	Class	Account Description	Project Description	JAN	FEB	MAR	APR	MAY	JUN
1	[redacted]	1	4001	000	90	Contributions-FOS	Council General	-5000.000	-8000.000	-19000.000	-32000.000	-54000.000	-10000.000
2	[redacted]	1	4069	000	90	Prov for Unc-FOS	Council General	-250.000	-400.000	-950.000	-1600.000	-2700.000	-500.000
3	[redacted]	1	4071	000	90	Contributions-Project Sales	Council General	0.000	0.000	0.000	0.000	0.000	-3000.000
4	[redacted]	1	4201	000	90	Contributions-SE-Sponsorships	Council General	0.000	0.000	0.000	0.000	0.000	0.000
5	[redacted]	1	4201	046	90	Contributions-SE-Sponsorships	60th anniversary celebration	-400.000	-400.000	-400.000	-700.000	-1142.000	-1500.000
6	[redacted]	1	4201	401	90	Contributions-SE-Sponsorships	DCD	0.000	0.000	0.000	0.000	-12500.000	-12500.000
7	[redacted]	1	4201	402	90	Contributions-SE-Sponsorships	Wine	0.000	0.000	0.000	0.000	0.000	0.000
8	[redacted]	1	4202	078	90	Contributions-SE-Participants	Spring Ox Roast	0.000	0.000	0.000	0.000	-10000.000	0.000
9	[redacted]	1	4202	079	90	Contributions-SE-Participants	Fall Ox Roast	0.000	0.000	0.000	0.000	0.000	0.000
10	[redacted]	1	4202	084	90	Contributions-SE-Participants	SHOOTING CLAY EVENT	0.000	0.000	0.000	0.000	0.000	0.000
11	[redacted]	1	4231	049	90	Contributions-SE-Other	Gala Luncheon	0.000	0.000	0.000	0.000	-10000.000	0.000

www.scouting.org/financeimpact



Budget Preparation





Budget Preparation

14.4.1 *Uploading Completed Budgets*

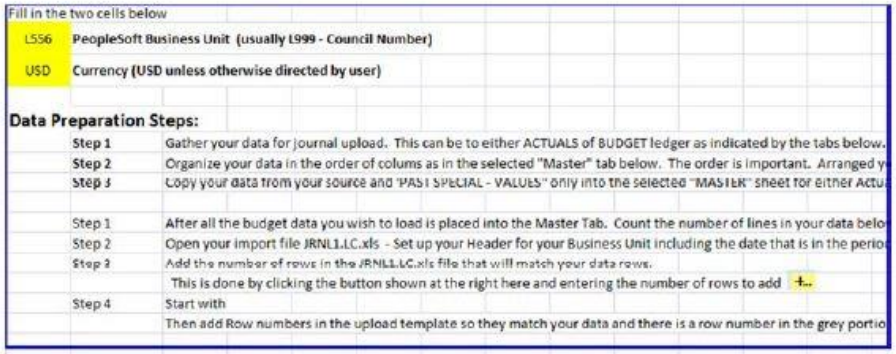
The council should have an excel spread sheet for gathering the budget data for uploading. The standard format is a file named "Journal Upload and Budget Upload Gathering Worksheet". The workbook contains instructions, a template to gather budget detail as above, and an upload formatted sheet for each month of the year.

Once gathered, budget numbers can be copied into a template that will upload them directly as journals into PeopleSoft. They arrive as unposted general journals which can be changed, edited and then posted or deleted for a retry.

14.4.1.1 Using the Gathering Template

Task #1 Open the Excel® Spreadsheet "Journal Upload and Budget Upload Gathering Worksheet"

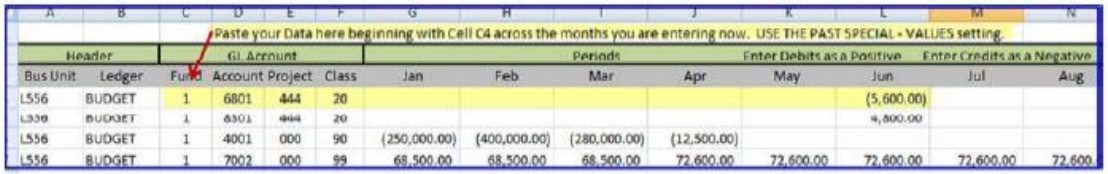
Task #2 Fill in the Set-up Tab (Business Unit and "USD") as below. This will be saved and will be retrained for future loads.



Fill in the two cells below	
L556	**PeopleSoft Business Unit (usually L999 - Council Number)**
USD	**Currency (USD unless otherwise directed by user)**
Data Preparation Steps:	
Step 1	Gather your data for journal upload. This can be to either ACTUALS of BUDGET ledger as indicated by the tabs below.
Step 2	Organize your data in the order of colums as in the selected "Master" tab below. The order is important. Arranged y
Step 3	Copy your data from your source and "PAST SPECIAL - VALUES" only into the selected "MASTER" sheet for either Actu
Step 1	After all the budget data you wish to load is placed into the Master Tab. Count the number of lines in your data belo
Step 2	Open your import file JRNL1.LC.xls - Set up your Header for your Business Unit including the date that is in the perio
Step 3	Add the number of rows in the JRNL1.LC.xls file that will match your data rows.
	This is done by clicking the button shown at the right here and entering the number of rows to add +...
Step 4	Start with
	Then add Row numbers in the upload template so they match your data and there is a row number in the grey portio

Budget Preparation

Task #3 Copy and Paste or load the data being returned from budget work into the gathering document.



A	B	C	D	E	F	G	H	I	J	K	L	M	N
Paste your Data here beginning with Cell C4 across the months you are entering now. USE THE PAST SPECIAL - VALUES setting.													
Header		GL Account				Periods				Enter Debits as a Positive		Enter Credits as a Negative	
Bus Unit	Ledger	Fund	Account	Project	Class	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
L556	BUDGET	1	6801	444	20						(5,600.00)		
L556	BUDGET	1	6801	444	20						4,800.00		
L556	BUDGET	1	4001	000	90	(250,000.00)	(400,000.00)	(280,000.00)	(12,500.00)				
L556	BUDGET	1	7002	000	99	68,500.00	68,500.00	68,500.00	72,600.00	72,600.00	72,600.00	72,600.00	72,600

REMEMBER: Debits are entered as a positive number. Credits are entered as a negative number.

Do not budget for deferred months on projects that are deferred.

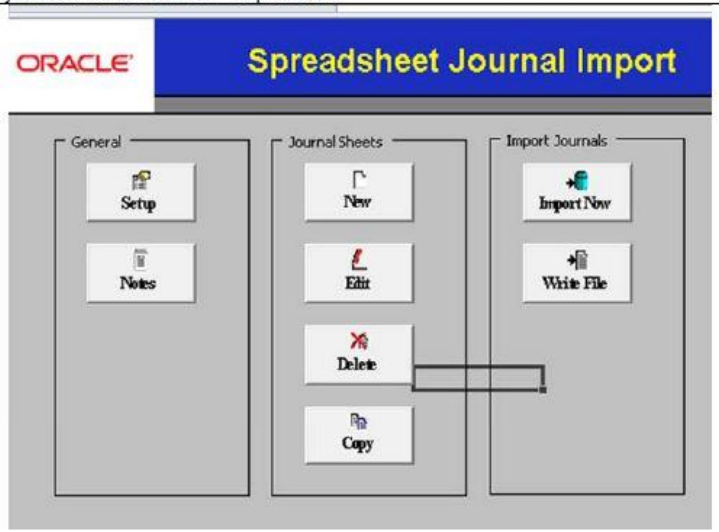
Task #4 Copy the data from the "Jan" tab into the upload template (January budgets)

HINT: First look at the "Jan" tab and count the lines you are about to copy to the upload template. Go to the bottom of the data and look at the Excel® row number then subtract 1 from that number. This will allow you to open the correct number of rows in the template for pasting. See instructions below on pasting data.

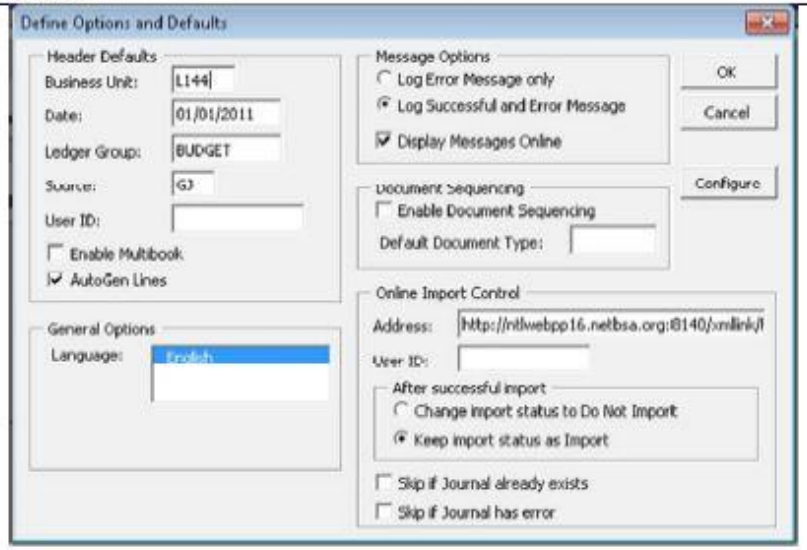
Task #4 Upload January budget data into the GL. After a successful upload, you will repeat the steps above and copy/upload "Feb", "Mar" etc. **Be sure you change the effective date on the upload template to match each month.**

Budget Preparation

Task #2 - Set up the template

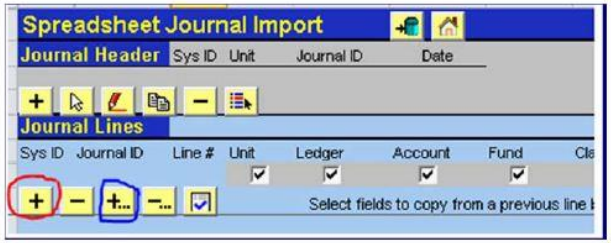
Step	Action
1	Open the JRNL1 spreadsheet. This is the template that is used to upload journal entries into PeopleSoft.
	 The user may see a message that asks if they want to Enable the Macros. Click **Enable**
2	Click on **Setup**

Budget Preparation

Step	Action
3	 Enter the proper Business Unit Enter the default date Enter the Ledger Group (ACTUALS or BUDGET) Enter Source: GJ **All other fileds should default. The address represents the environment. Users will be provided the Production address in the version provided during training. Optional: Enter User ID (It can be loaded later) Click **OK**

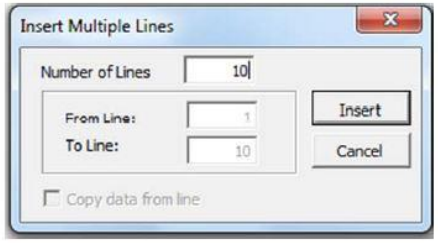
Budget Preparation

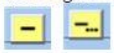
Step	Action
5	**HINT: It is important to know who many lines of journal you are about to add. If the journal is already in an Excel® sheet, you can count the lines before copying the journal into this template. If you are creating it manually, you can add lines as needed.**



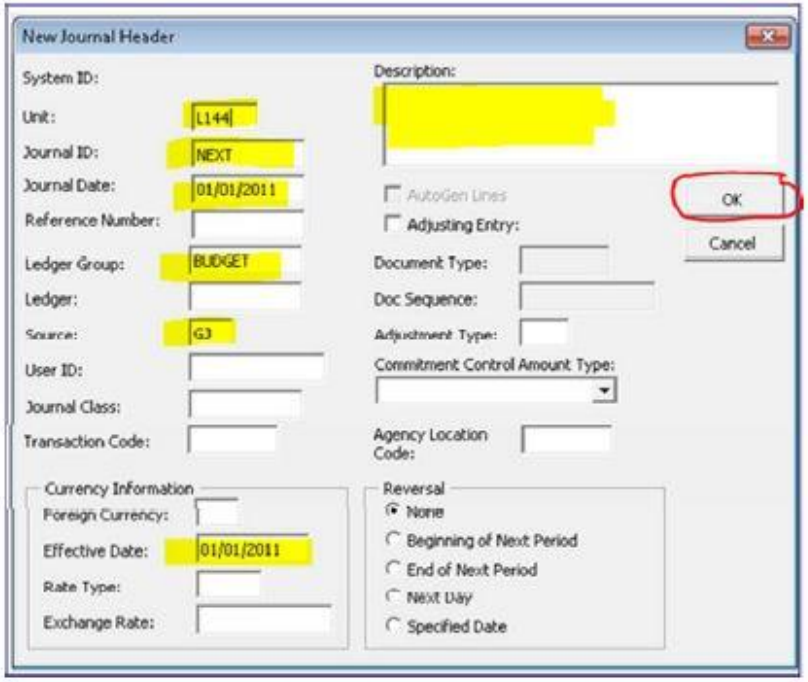
Click the Plus sign in the Journal lines section for one at a time addition of lines. 

Click the Plus... sign to add multiple lines. Enter the number of lines needed for the journal entry and click **Insert**.

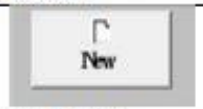
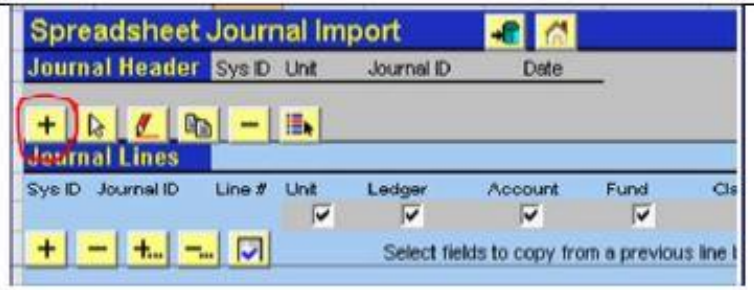


The minus signs can also be used to remove one line at a time or multiple lines. 

Budget Preparation

Step	Action
4	Establish the journal entry header  Enter a description. The other values default in from the Set up step. The Unit, Journal Date and Ledger Group can be changed from the default values in this window. Click **OK**

Budget Preparation

Step	Action
1	 Click **New**
2	 Enter the Journal Sheet Name i.e. **January 2013 Budget** Click **OK**
3	 Click on the first plus sign under Jounal Header 

Budget Preparation

Step	Action
6	

Journal Header

Sys ID	Unit	Journal ID	Date	
1007	L556	0000000776	1/31/2013	January 2013 Budget Load

Journal Lines

Select fields to copy from a previous line by marking the checkboxes under each field.

Sys ID	Journal ID	Line #	Unit	Ledger	Account	Fund	Class	Project	Currency	Amount	Description
1007	0000000776	1	L556	ACTUALS	4001	1	90	000	USD	(27,214.86)	Budget Load
1007	0000000776	2	L556	ACTUALS	4069	1	90	000	USD	2,721.49	Budget Load
1007	0000000776	3	L556	ACTUALS	4201	1	90	256	USD	(5,000.00)	Budget Load
1007	0000000776	4	L556	ACTUALS	4249	1	90	256	USD	500.00	Budget Load
1007	0000000776	5	L556	ACTUALS	4401	1	90	125	USD	(10,000.00)	Budget Load
1007	0000000776	6	L556	ACTUALS	4701	1	90	400	USD	(6,000.00)	Budget Load
1007	0000000776	7	L556	ACTUALS	4702	1	90	400	USD	(2,500.00)	Budget Load
1007	0000000776	8	L556	ACTUALS	6501	1	90	027	USD	(22,000.00)	Budget Load

Enter your data in the grey area and in this exact sequence: Business Unit, Ledger, Account, Fund, Class, Project, Currency (USD), Amount and Description, and start in the cell circled in red here. If you are pasting from another spreadsheet in the same format, please use the Paste Special = Paste Values method of pasting copied data. This example is a budget load.

Note 1: Amounts must be entered as a positive number for a Debit and a negative number for Credit when using the journal entry upload template.

Note 2: All the lines in template must be filled – No empty lines. If you have too many lines opened for your data, delete the empty lines.

Note 3: When uploading budget or journals from another spreadsheet, make sure the columns are in the correct order to match this template and

Budget Preparation

Step	Action
8	Use the "Home" button to get back to the main menu. **NOTE:** Once journals are loaded, the template archives them for reference. You can see and mange them using the Edit and Delete buttons. 

Budget Preparation

Step	Action
1	Log into PeopleSoft. Navigate to Create/Update Journal Entries. General Ledger> Journals > Journal Entry > Create/Update Journal Entries 
2	Search for the journal that was just created. Edit and Post journal. *For further instructions on editing and posting a journal. See the General Ledger section of the user guide or help function within PeopleSoft.

Year End Preparation

- Current with Monthly Reconciliations
- 1099 Preparation & Process
- Recording Fixed Asset Additions/Changes
- Updated Time Study for Functional Expense Rprt
- SellWise Year End Procedures
- Membership Year End Close Procedures
- Accounts Payables
- General Ledger
- Allocations

1099 Electronic Filing Prep

Resources

- General Instructions https://www.irs.gov/pub/irs-pdf/i1099msc.pdf
- Council Fiscal Management -

  http://www.scouting.org/FinanceImpact/Council/Fiscal/Management/PeopleSoft/Year_End.aspx
- Member Care Contact Center

1099 Electronic Filing

- Transmitter Control Code (TCC) number required
- IRS Form 4419 (Application for Filing Information Returns Electronically (FIRE)
- Create an online FIRE system account
  - https://fire.irs.gov/firev1r/default.aspx

Processing IRS Form 1099

- Step 1 – Identify vendors designated as 1099
- Step 2 – Identify vouchers that are 1099 applicable
- Step 3 – Select vouchers flagged as “N” in the query
- Step 4 – Update 1099 Withholding information
- Step 5 – Print the list of vendors with associated 1099 Vouchers
- Step 6 – Generate the 1099 MISC. forms and the “Test” for the IRS
- Step 7 – Generate the 1099 Misc. forms and the electric file for the IRS

Identify 1099 Withholding Vendors
Query LC_1099_VENDORS

LC_1099_VENDORS

SetID: L[redacted]

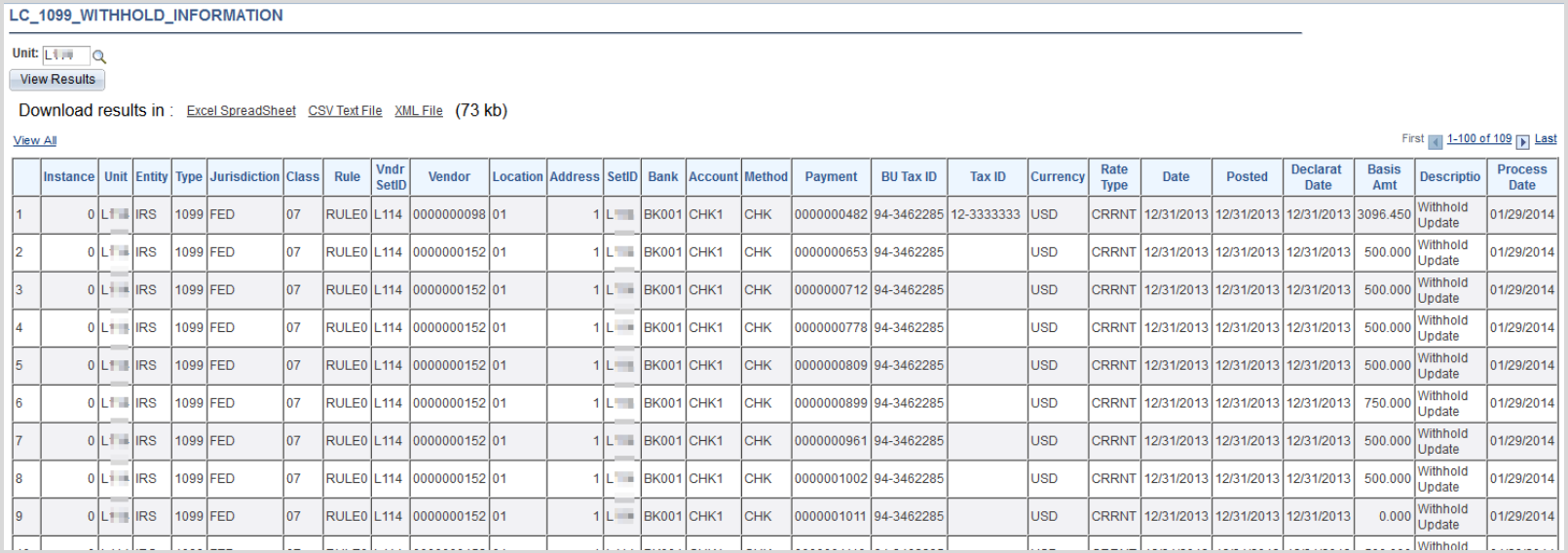
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (1 kb)

View All

	SetID	Vendor ID	Vendor Name
1	L[redacted]	011228	ALVAREZ-BIVER, VANESSA
2	L[redacted]	012067	BUSH REFRIGERATION
3	L[redacted]	002330	CLIFTONLARSONALLEN, LLP
4	L[redacted]	0000000098	DEALRAISER, LLC
5	L[redacted]	012168	GREEN, DONALD
6	L[redacted]	0000000152	GUAY, STEFANIE
7	L[redacted]	011556	JOHN'S HAULING
8	L[redacted]	012520	KELLY COBB
9	L[redacted]	001607	KERBER,ECK,&BRAECKEL LLP
10	L[redacted]	011640	MAILFINANCE
11	L[redacted]	0000000377	Puck's Mechanical
12	L[redacted]	012539	SCHULT QUALITY TREE SERV.
13	L[redacted]	012290	VAREL TENT RENTALS

Identify 1099 Withholding Vendors
Query LC_1099_WITHHOLDING_INFORMATION



LC_1099_WITHHOLD_INFORMATION

Unit: L114

View Results

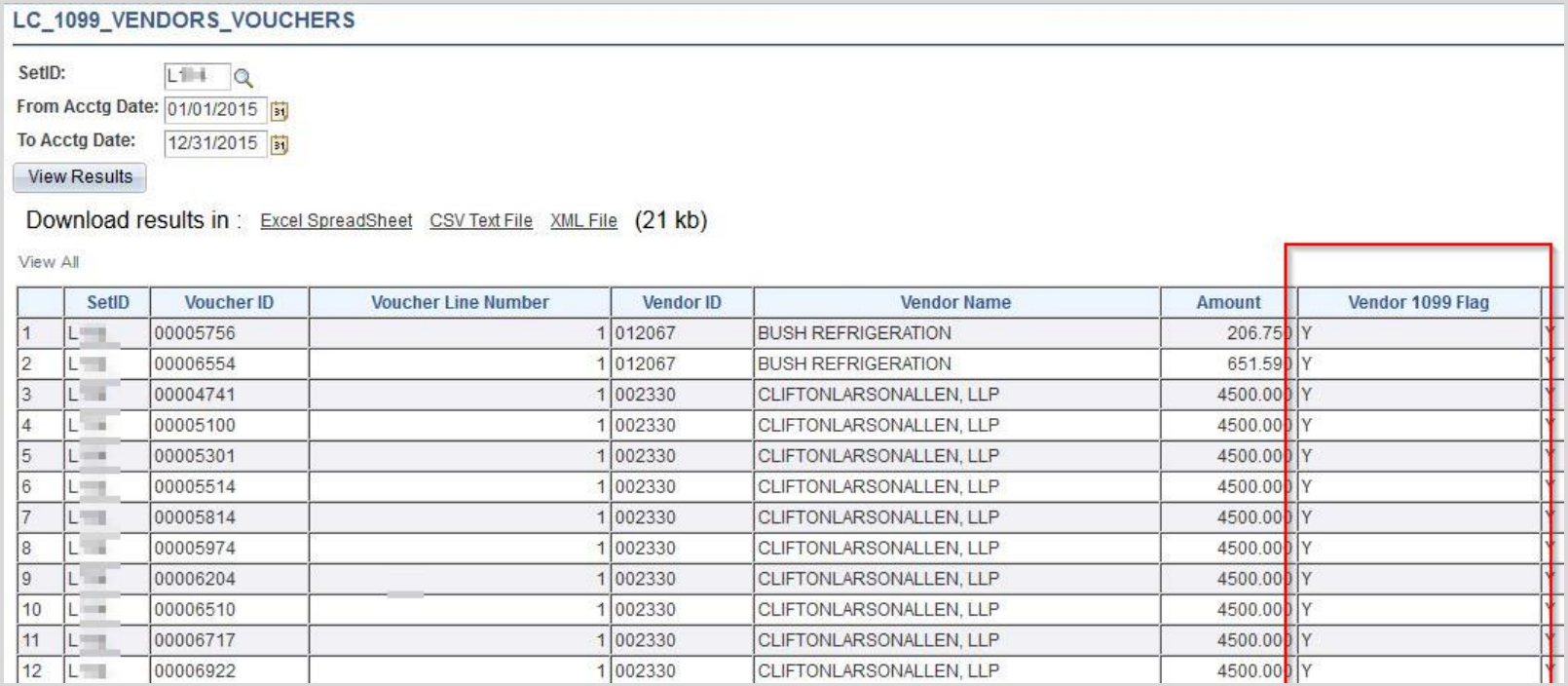
Download results in : Excel SpreadSheet CSV Text File XML File (73 kb)

View All

First 1-100 of 109 Last

	Instance	Unit	Entity	Type	Jurisdiction	Class	Rule	Vndr SetID	Vendor	Location	Address	SetID	Bank	Account	Method	Payment	BU Tax ID	Tax ID	Currency	Rate Type	Date	Posted	Declarat Date	Basis Amt	Descriptio	Process Date
1	0	L114	IRS	1099	FED	07	RULE0	L114	0000000098	01	1	L114	BK001	CHK1	CHK	0000000482	94-3462285	12-3333333	USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	3096.450	Withhold Update	01/29/2014
2	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000653	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
3	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000712	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
4	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000778	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
5	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000809	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
6	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000899	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	750.000	Withhold Update	01/29/2014
7	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000000961	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
8	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000001002	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	500.000	Withhold Update	01/29/2014
9	0	L114	IRS	1099	FED	07	RULE0	L114	0000000152	01	1	L114	BK001	CHK1	CHK	0000001011	94-3462285		USD	CRRNT	12/31/2013	12/31/2013	12/31/2013	0.000	Withhold Update	01/29/2014

Identify Vouchers
Query LC_VENDORS_VOUCHERS



LC_1099_VENDORS_VOUCHERS

SetID: L[redacted]

From Acctg Date: 01/01/2015

To Acctg Date: 12/31/2015

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (21 kb)

View All

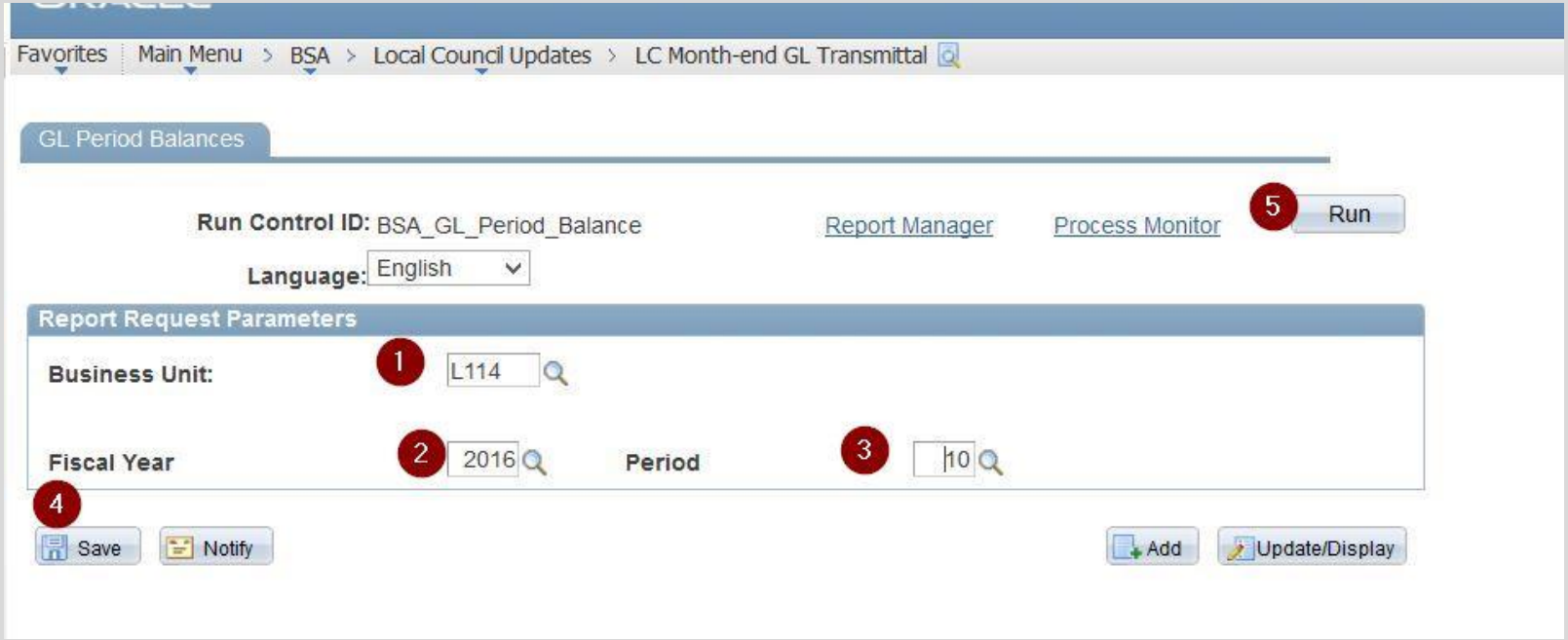
	SetID	Voucher ID	Voucher Line Number	Vendor ID	Vendor Name	Amount	Vendor 1099 Flag
1	L[redacted]	00005756	1	012067	BUSH REFRIGERATION	206.750	Y
2	L[redacted]	00006554	1	012067	BUSH REFRIGERATION	651.590	Y
3	L[redacted]	00004741	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
4	L[redacted]	00005100	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
5	L[redacted]	00005301	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
6	L[redacted]	00005514	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
7	L[redacted]	00005814	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
8	L[redacted]	00005974	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
9	L[redacted]	00006204	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
10	L[redacted]	00006510	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
11	L[redacted]	00006717	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y
12	L[redacted]	00006922	1	002330	CLIFTONLARSONALLEN, LLP	4500.000	Y

Journey to Excellence Submission

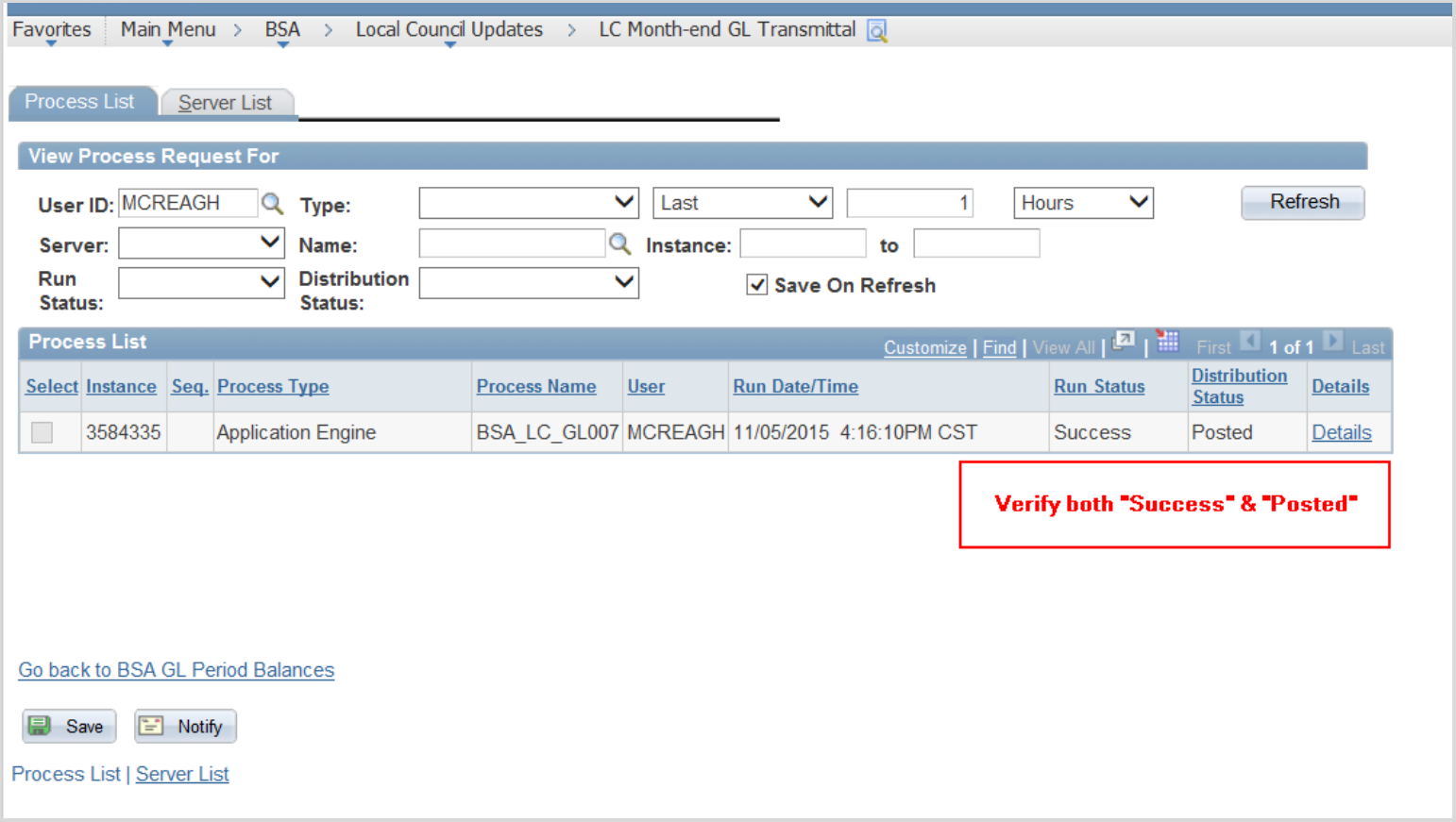
Journey to Excellence Submission

- Submitting JTE
- Populate the Finance Facts database
- This is not an automatic process
- Part of the month-end process
- After making Audit Adjustments

Journey to Excellence Submission



Journey to Excellence Submission



Journey to Excellence Submission

- Using the “Refresh” button, wait until status is complete with “Success” in the Run Status column and “Posted” in the Distribution Status
- If this process completes with an “Error” in the Run Status, contact the Member Care Contact Center to report this condition.

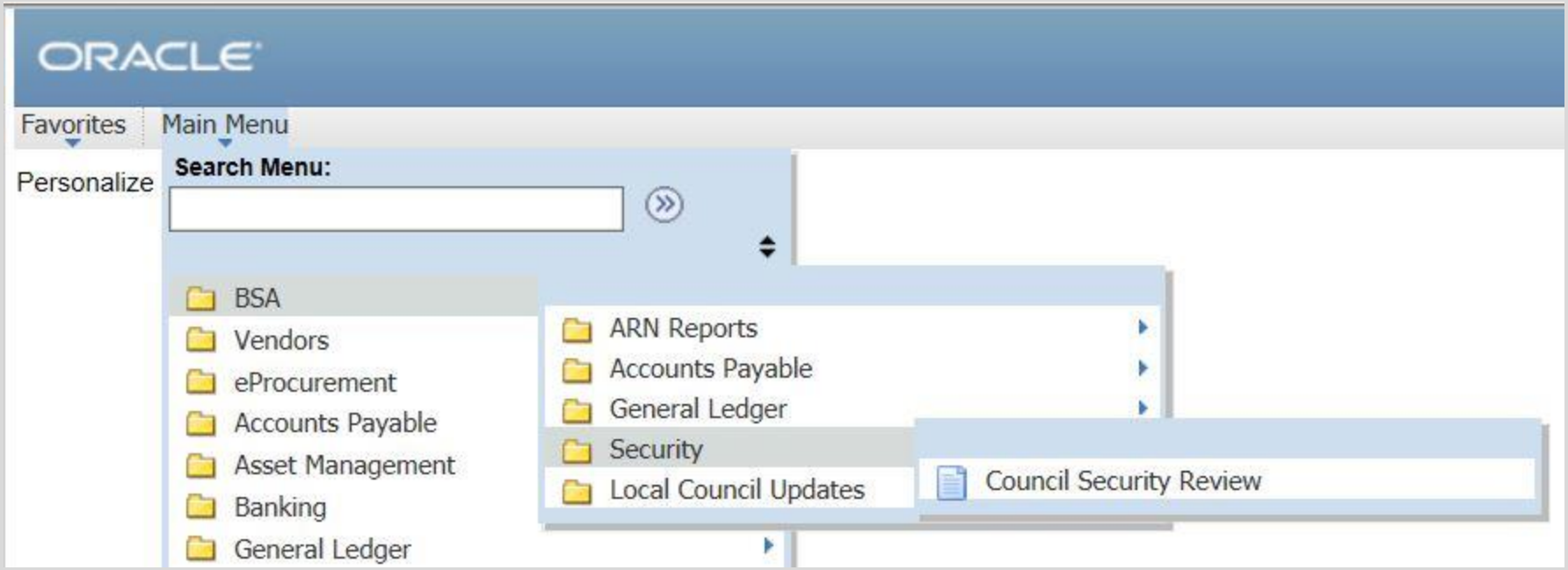
Journey to Excellence Submission

- Close Each Month
- Close again if you make prior period adjusted
- Close again if when you make Audit adjustments (you would re-close each month)
- If you are doing multiple monthly closes in the same day you'll need to wait four hours between submissions

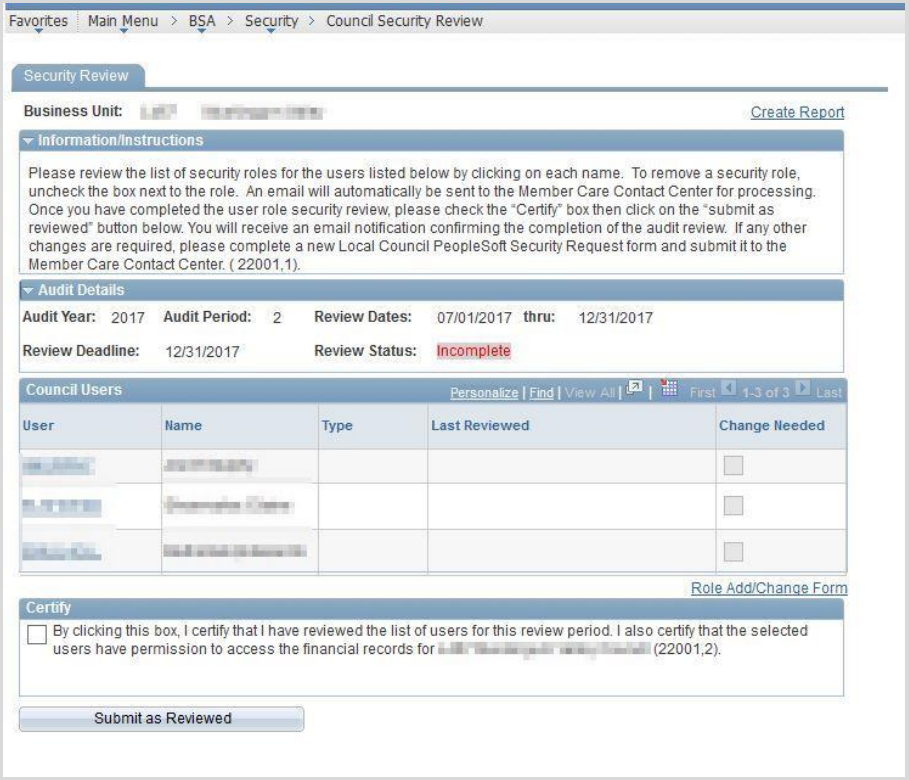
PeopleSoft User Security

The Scout Executive's Role

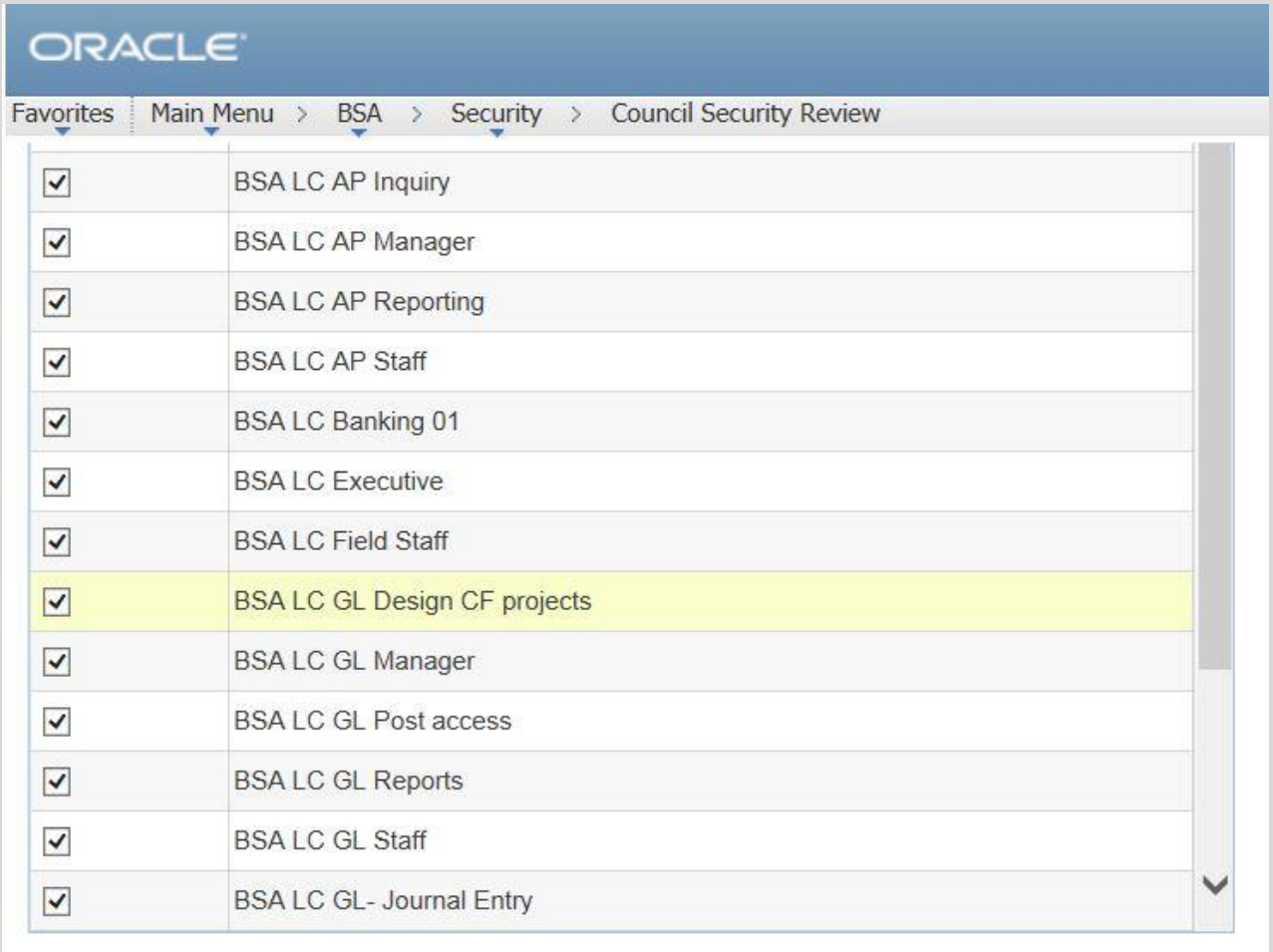
PeopleSoft User Security



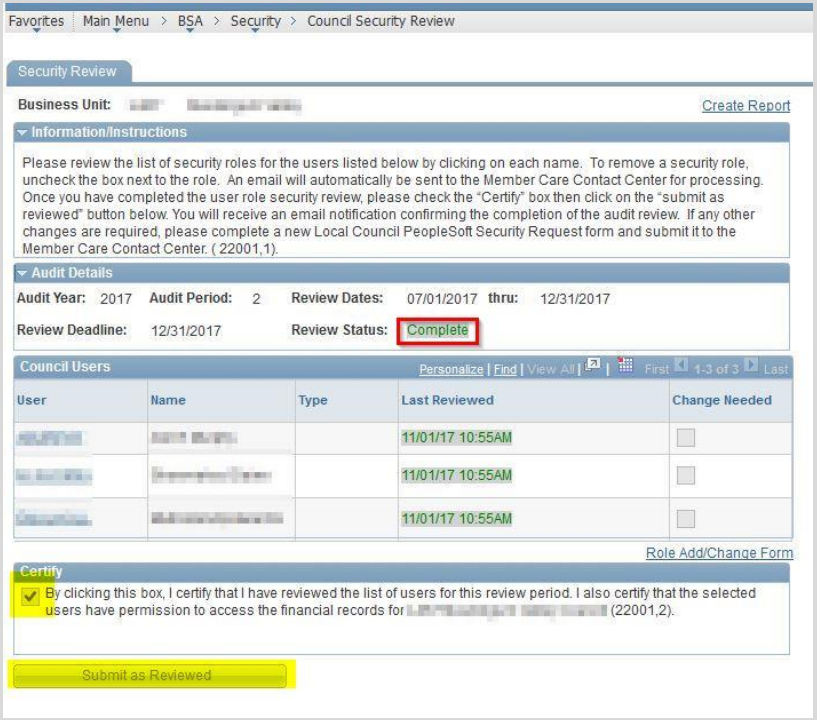
PeopleSoft User Security



PeopleSoft User Security



PeopleSoft User Security



Future Scheduled Webinar

December 13, 2017

10:00AM & 2:00PM

Central

2018 Training Opportunities

www.scouting.org/FinanceImpact/Training

- **Accounting Specialist Training**
  - – $750.00 three courses in 2018 at ScoutingU Westlake, TX
- **Fiscal Management I**
  - – $250.00 four courses in 2018 at various Council offices around the country
- **Fiscal Management II**
  - – $300.00 Two courses in 2018 – May 8-9 & September 11 -12

Member Care Contact Center

- Needs User Guide
- Best practices
- Accounting calls have a special queue
- Three care members rotate on calls
- Reviewing how calls will be handled next year

- For assistance, please contact the Member Care Contact Center through the online Support Center site in MyBSA or at (855) 707-2644

Feedback Time

- Questions
- Best practices
- Needs
- Requests for future user group topics email michael.creagh@scouting.org