



FINANCIAL REVIEW FORM

Each month a review of the unit/department must be completed and submitted to the Chief Business Office (CBO). The review must consist of an overall budget to actuals review of revenues and expenditures for the unit/department. As part of the [USG](#) and [UGA](#) Financial review policy, the review must answer the following questions:

- 1) *Do the transactions and encumbrances appear reasonable regardless of origination?*
- 2) *Were the transactions and encumbrances expected for the given fund, department or chartstring element?*
- 3) *Do the posted transactions and encumbrances appear to be appropriate for the chartstring?*
- 4) *Are the financial transactions within budget and/or funding limits?*

Month-End Date: *(month & year)* _____

Unit/Dept Name: _____ **Unit/Dept FMS ID:** _____

Report and detailed transactions reviewed. List below any corrective action(s) or investigation needed, include the information about the issue and type of corrective action(s) is needed:

By signing below, I affirmed that my Unit/Dept has been reviewed to assess the reasonableness and accuracy of financial transactions and overall status of budget and funding.

Financial Support Signoff: _____

Dean/Assoc Dean/Dept Head/Director Signoff: _____

Add'l Assoc Dean/Dept Head/Director Signoff: _____

Chief Business Officer Signoff: _____

Comments: