THE SPREADSHEET
CFO DIVISION NEWS

UF UNIVERSITY *of* FLORIDA
CFO

Welcome to our finance community monthly newsletter. Our team shares divisional updates, critical dates & deadlines, best practices, and other information for the UF Finance community.

Go Gators!

DIVISION UPDATES

Health of a Unit Dashboard

Thank you to all who participated in the Radical Financial Transparency discussions. Over the course of 60+ units and even more conversations, your diligent feedback and insight on your unit helped us to identify, aggregate, and validate key metrics for the University.

As a result of those conversations, the CFO's Finance Strategy & Analytics team developed and showcased the Health of a Unit dashboard to Financial Accountable Officers (FAOs).

This dashboard was designed to provide timely and actionable insights, create a common language for us to compare financial data, and enable easier data-driven decision-making. The intended audience for this dashboard is unit business leaders.

To find out more or gain access to the dashboard speak to your FAO. For general feedback on the dashboard please submit via the [Finance Hub form](#).

Real IDs Required for Travel

Real IDs (e.g. Driver's Licenses) will be required as of May 7, 2025 - make sure you are ready to travel!

BE REAL ID READY BY MAY 7, 2025

WHAT IS REAL ID?
It's the law. The REAL ID Act establishes minimum security standards for license issuance and production.

WHAT DO I NEED A REAL ID FOR?
Domestic Air Travel
Accessing Certain Federal Buildings/DOD Installations
Entering Nuclear Power Plants

HOW DO I KNOW IF I HAVE ONE?
Visit our interactive tool at tsa.gov/real-id to find out if you're REAL ID ready.

LOOK FOR THE STAR
In general, a REAL ID features a star in the upper right or left corner.

HOW DO I GET A REAL ID?
· Visit tsa.gov/real-id and click on your state or territory.
· Look for instructions from your local DMV on the necessary steps.

LEARN ABOUT ACCEPTABLE FORMS OF ID
For a complete list of TSA acceptable identifications*, go to tsa.gov/id.

BE READY TO FLY
Upgrade to REAL ID by MAY 7, 2025.

GET THE REAL ID CAMPAIGN MATERIALS | TSA.GOV/REAL-ID

*Applies to boarding commercial aircraft.

Learn more here: REAL ID | Homeland Security

New UF GO Travel Booking Experience

On February 28th, 2025, the UF GO Travel Online Booking tool will deliver a new, intuitive user interface and enhanced content experience for travelers! Please see the New UF GO Travel Booking Experience Document for more detailed information and screenshots.

Upcoming Presentation by Southwest Airlines!

Please join us for a presentation by Elise Williams from Southwest Airlines. This informative webinar will discuss Southwest Airlines' benefits when booking in Concur. Please **share this event** with your travelers and travel arrangers!

Learn more about this event: Event Details
Date: February 27th
Time: 10:00 am - 11:00 am
Register Here

Why fly with Southwest Airlines? Click here to learn more about the benefits of flying with Southwest and their Rapid Rewards loyalty program.

Agreement Intake Form

When to use the Agreement Intake Form:
Use the Agreement Intake Form (AIF) when an agreement or contract needs Procurement's review/signature and a requisition would not be appropriate.

A requisition would not be appropriate when:

- The event/service/item will be paid for using a PCard.
- The agreement or contract is to secure conference space/hotel rooms and/or catering etc. for a future event and funds will be encumbered at a later date.
- The contract requires a signature but there is no cost/payment required.

For help with choosing which form to use for a Requisition, use the [Guide To Appropriate Form Use In MyUF Market.](#)

PCard Aging

PCard charges should be approved within 15 days of the posting date for non-travel transactions and 15 days of the trip end date for travel transactions.

Why wait? PCard charges can be added to an expense report as soon as they post to UF GO. Charges older than 30-days may result in **card suspension** and should be reconciled as soon as possible.

Accidental personal charges typically occur when the PCard is saved as a payment method in online accounts. To prevent this, it is recommended to remove the PCard from services primarily used for personal purposes.

Need assistance with UF GO? Contact us [here](#).

Budget Errors

Units should regularly run queries to identify Vouchers that are in budget error.

Resources for correcting budget errors: UF GO Toolkits and a prior Info Session recording here: Forms & Resources | UF Procurement

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UF GO Information Sessions

For all sessions, participation is limited to the first 300 attendees. The sessions are recorded, and the videos are posted to the UF GO Forms & Resources website after each session.

Register in advance to receive updates and reminders!

March

Topic: PCard Temporary Limit Increases/Exceptions

Overview of when and how to request a temporary limit increase or exception for a PCard.

Date & Time: March 12th from 10 am - 11 am
Register Here

The Color of Money
March 4th, 1:30 pm - 4:30 pm (via Zoom)
Register Here

Internal Controls at UF

March 6th, 9:00 am - 12:00 pm (via Zoom)
Register Here

Fraud Awareness Training
March 11th, 9:00 am - 12:00 pm (via Zoom)
Register Here

Procure 2 Pay Workshop
March 25th, 2:00 pm - 4:30 pm (via Zoom)
Register Here

UF GO Travel Advanced Workshop
April 16th, 9:00 am - 12:00 pm (in person at Elmore Hall)
Register Here

FEATURED FINANCE STAFF

Michelle Romero

Finance Strategy & Analytics

The CFO Division is thrilled to recognize our very own Michelle Romero, Management Analyst for the Finance Strategy & Analytics team. Michelle won the Superior Accomplishment Award for Sustained Excellence in Division 1.

In her wide-ranging role as a Management Analyst, Michelle acts as a liaison with UFIT on reporting initiatives, Salesforce, and other technical projects, providing a single point of contact and support for financial data to the UF Finance Community and core offices. She also provides pivotal support on special projects for senior leadership and drives the CFO's data analytics initiatives.

The entire university has benefitted from Michelle's charge to enhance communication, accessibility and enablement of financial reporting solutions as she advocates for advanced solutions to solve significant business problems.

"Michelle is, at her core, the most helpful and giving person I have worked with, often sacrificing her own time to help another person succeed. It is a remarkable skill that, while I know everything she has going on and the many things she is juggling, the person she is helping never does," said Emily Moran, Director of Finance Strategy & Analytics.

The CFO Division would also like to congratulate all the finance employees who were nominated for the Superior Accomplishment Awards! If you know of a deserving nominee in your area, please submit using the link below for them to be featured in future newsletters.

Nominate a Finance Staff Member

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Get in Touch!