



## Finance Manager County Setup Check List

**Directions:** The below checklist can be used as a reference to validate if the required processes have been executed when setting up a county in *imaginels*. Included in the checklist is the Finance Manager Reference Guide page number where instructions to complete the task is located.

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|---|---|
| <input type="checkbox"/> Create County Fiscal Year<br>Manger Guide – Page 2                             | <input type="checkbox"/> Create Local Service Price List (Provider Rate)<br>Finance Manger Guide – Page 6               |
| <input type="checkbox"/> Create County Fund Source<br>Finance Manger Guide – Page 11                    | <input type="checkbox"/> Associate Local Provider Service to a Fund Source Allocation<br>Finance Manger Guide – Page 12 |
| <input type="checkbox"/> Create County Fund Source Allocation<br>Finance Manger Guide – Page 11         | <input type="checkbox"/> Assign a Local Service to Yourself (FM)<br>Finance Manger Guide – Page 18                      |
| <input type="checkbox"/> Create Local Provider<br>Finance Manger Guide – Page 4                         | <input type="checkbox"/> Associate a Service with Providers<br>Finance Manger Guide – Page 14                           |
| <input type="checkbox"/> Invite Local Provider to <i>imaginels</i><br>Finance Manger Guide – Page 20    |   |
| <input type="checkbox"/> Create Local Service Price List (County Rate)<br>Finance Manger Guide – Page 6 |   |

