



## Finance Manager Tip Sheet

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1. **Create a County Fiscal Year: (pg. 2 FM Guide)**  
*CRM → Finance Manager → County Fiscal Year → +New → Fill Fields → Save & Close*
2. **Create a County Funding Source: (pg. 3 FM Guide)**  
*CRM → Finance Manager → Funding Sources → +New → Fill Fields → Save & Close*
3. **Create a County Fund Source Allocation: (pg. 9 FM Guide)**  
*CRM/ Finance Manager / County Fund Source Allocation/+New/Fill/Save*
4. **Create a Local Service County Rate. (pg. 6 FM Guide)**  
*CRM → Finance Manager → Local Services → +New → Fill Fields → Save & Close*
5. **Create a Local Service Provider Rate (pg.7-8 FM Guide)**  
*CRM → Finance Manager → Local Services → Provider Local Services → Fill Fields → Save & Close*
6. **Create a New Provider (pg.4. FM Guide)**  
*CRM → Imagine → Providers → +NEW → Fill Fields → Save & Close*
7. **Invite New Provider to ImagineIS (pg.15 FM Guide)**  
*CRM → Finance Manager → Local Service → +New → Fill Fields → Save & Close*
8. **Associate a Local County/Provider Service to a Fund Source Allocation: (pg.10 FM Guide)**  
*CRM/ Finance Manager / CFSA / Open Allocation/ Scroll down to Associated Services/+New*
9. **Approve a Funding Request (pg.25 FM Guide)**  
*Financial Approval Dashboard → Select 'My Service Summaries Pending Approval-Finance Open Summary → Select "Approve Request" → if problem with Service Summary, select "Revise" to modify current Summary*
10. **Print Service Summary (pg.21 FM Guide)**  
*CRM → Imagine → Individuals → Select Individual → Service Summary → "..." → Run Report → Select Individual Service Summary Report (working draft) first choice*
11. **Deactivate/Activate a Local Service (pg.18,19 FM Guide)**  
*CRM → Finance Manager → Local Services → Select Local Service → Activate / Deactivate →*
12. **Review the Remaining Balance on County Fund Source Allocations (pg.27 FM Guide)**  
*CRM → Finance Manager → County Fund source Allocation → Scroll down to All Services → See Total Allocated / Total Remaining*

