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From: Cardinal Interfaces

Subject: Cardinal Monitoring Tips

Welcome to Cardinal Day 1 --- you finally made it! Congratulations!

While you have done so much to prepare for this day, it will take time to fully transition into the new system. In addition to all the training materials and job aids that Cardinal has provided, we have also pulled together a list of monitoring tips that should help provide some guidance on ways to review your financial activities in the system. These tips are not intended to be a complete listing of everything you should be doing to ensure you are meeting all the requirements related to accurate and compliant financial processing, but instead are some key tasks that may give you a good jump start as you begin to navigate your way through your new monitoring processes.

Some of the tasks are recommended for the initial system stabilization period, particularly as they relate to agency upload interface monitoring to help ensure the detailed transactions are making it into Cardinal correctly. Other tasks are recommended for all agencies, interfacing and online, to conduct on an ongoing basis. For each of the recommended tasks, we have provided some key inquiry, query, and report navigation paths to help you execute these reviews. Of course, the Cardinal training materials and job aids will supplement this document by providing additional details as needed.

We hope you find these monitoring tips helpful, but recognize you will need to incorporate these recommendations into your agency operations accordingly – there is no one size fits all solution.

Best Wishes,

Cardinal Project Team