

Course Catalog ^[1]

Analyzing and Interpreting Financial Statements

The Analyzing and Interpreting Financial Statements course offers 4.0 credit hours in Accounting (Governmental) and will provide an overview of the annual financial statements, and how to interpret the story they are telling.

[View Analyzing and Interpreting Financial Statements](#) ^[2]

Budget Basics

The Budget Basics course offers 1.0 credit hours in Finance and will provide participants with an overview of budgeting at the University of Colorado, including components of the budget, the implications of the budget on a fund-by-fund basis, differences and similarities between campuses, and how budgets work in the University's Finance System.

[View Budget Basics](#) ^[3]

Business Process Improvement

The Business Process Improvement course offers 1.0 credit hours in Management Services and will provide participants with an overview of the key theories and steps to identify areas within an organization where processes can become more streamlined and efficient.

[View Business Process Improvement](#) ^[4]

Career Development

The Career Development course offers 1.5 credit hours in Personnel/Human Resources and will provide participants with an overview of learning and work-related activities that help them achieve career objectives such as skill acquisition, goal setting, networking, and continuous learning.

[View Career Development](#) ^[5]

Cash Controls

The Cash Controls course offers 2.0 credit hours in Finance and will provide participants with an understanding of the various forms of incoming payments (receipts), how they should be processed, deposited, and booked into the general ledger, as well as the internal controls that must be put in place to prevent error and fraud.

[View Cash Controls](#) [6]

Conflict Styles

The Conflict Styles course offers 1.0 credit hours in Personal Development and will provide participants with knowledge, self-awareness and analysis, and application/skill development across the range of conflict styles in order to manage issues and disputes more effectively

[View Conflict Styles](#) [7]

Cost Transfers

The Cost Transfers course offers 1.0 credit hours in Accounting (Governmental) and will provide participants with a basic understanding of what a cost transfer is, and the steps involved to approve sponsored project cost transfers.

[View Cost Transfers](#) [8]

CU-Data: Calculating Your Bottom Line

The CU-Data: Calculating Your Bottom Line course offers 1.0 credit hours in Accounting (Governmental) and will provide participants with an overview of the CU-Data m-Fin reports (in the Cognos Financial Reporting System) that display “bottom line” balances, and how these balances are calculated, distinguished by fund type.

[View CU-Data: Calculating Your Bottom Line](#) [9]

CU-Data: Grants and Contracts

The CU-Data: Grants and Contracts course offers 2.0 credit hours in Computer Software and Applications and will provide participants with an overview of common financial management tasks for Grants and Contracts at the University of Colorado, and the CU-Data m-Fin reports (in the Cognos Financial Reporting System) that can facilitate accomplishing these tasks.

[View CU-Data: Grants and Contracts](#) [10]

CU-Data: Monthly Financial Review Reports

The CU-Data: Monthly Financial Review Reports course offers 2.0 credit hours in Computer Software and Applications and will provide participants with an overview of the CU-Data m-Fin reports that are used for month-end and year-end reconciliation activities.

[View CU-Data: Monthly Financial Review Reports](#) [11]

CU-Data Overview

The CU-Data Overview course offers 1.0 credit hours in Computer Software and Applications and will provide participants with tips on how to work efficiently, running financial reports in the CU-Data (Cognos Financial Reporting) System.

[View CU-Data Overview](#) [12]

CU-Data: Payroll Reports

The CU-Data: Payroll Reports course offers 1.0 credit hours in Computer Software and Applications and will provide participants with an overview of the CU-Data m-Fin reports (in the Cognos Financial Reporting System) that display payroll information, and how to read and understand these reports.

[View CU-Data: Payroll Reports](#) [13]

Developing a Growth Mindset

The Developing a Growth Mindset course offers 2.0 credit hours in Personnel/Human Resources and will teach participants skills to help them remain relevant in an ever-changing world.

[View Developing a Growth Mindset](#) [14]

Emotional Intelligence

The Emotional Intelligence course offers 3.0 credit hours in Personnel/Human Resources and will provide participants with a skill to improve both personal and interpersonal functioning by exploring and applying the components of Emotional Intelligence.

[View Emotional Intelligence](#) [15]

Ethics vs. Fraud: Similarities, Differences, and Ensuring Accountability for Both in Your Organization

The Ethics vs. Fraud: Similarities, Differences, and Ensuring Accountability for Both in Your Organization course offers 2.0 credit hours in Behavioral Ethics and will inform participants of similarities and differences of ethics and fraud, the importance of having policies in place to promote ethical decision making, the importance of having policies in place to assist in preventing fraud, and to discuss current statistics of how fraud infiltrates organizations.

[View Ethics vs. Fraud: Similarities, Differences, and Ensuring Accountability for Both in Your Organization](#) [16]

Excel: Charts & Graphs

The Excel: Charts & Graphs course offers 2.0 credit hours in Computer Software and Applications and will provide participants with tips on how to present data in visually impactful ways.

[View Excel: Charts & Graphs](#) [17]

Exploring Leadership

The Exploring Leadership course offers 2.0 credit hours in Personal Development and will provide participants an opportunity to discover various ways to develop their leadership skills.

[View Exploring Leadership](#) [18]

External Audits: Why are These People Here, and When are They Going to Leave?

The External Audits: Why are These People Here, and When are They Going to Leave? course offers 3.0 credit hours in Auditing (Governmental) and will provide participants with an overview of the external audit process, the limitations inherent in an external audit, the goal of an external audit, and the expectations of them when the external audit is being conducted.

[View External Audits: Why are These People Here, and When are They Going to Leave?](#) [19]

Financial Reporting Strategy

The Financial Reporting Strategy course offers 1.0 credit hours in Computer Software and Applications and will provide an overview of the software and tools used at CU for reporting financial data.

[View Financial Reporting Strategy](#) [20]

Financial Statement Reading, Reconciliation, and Forecasting

The Financial Statement Reading, Reconciliation, and Forecasting course offers 3.0 credit hours in Accounting (Governmental) and will provide participants with strategies for reviewing and reconciling monthly statements and for forecasting future activity.

[View Financial Statement Reading, Reconciliation, and Forecasting](#) [21]

Fiscal Roles in Financial Systems and Reporting

The Fiscal Roles in Financial Systems and Reporting course offers 1.0 credit hours in Finance and will provide participants with an overview of the fiscal roles of the University of Colorado, along with information on maintaining these roles at the Department, Program, Project, and SpeedType levels.

[View Fiscal Roles in Financial Systems and Reporting](#) [22]

GASB Review

The GASB Review course offers 2.0 credit hours in Accounting (Governmental) and will provide an overview of select GASB pronouncements of particular interest to the University of Colorado.

[View GASB Review](#) [23]

Gearing Up for Fiscal Year-End

The Gearing Up for Fiscal Year-End course offers 1.0 hours in Accounting (Governmental)

and will provide participants with a basic understanding of the importance of fiscal year-end, the tasks they need to complete, and the deadlines that may impact them.

[View Gearing Up for Fiscal Year-End](#) [24]

Generative AI: Prompt Like a Pro

The Generative AI: Prompt Like a Pro course offers 1.0 credit hours in Information Technology and will enable participants to refine their Artificial Intelligence requests to get more accurate, creative, and useful responses from GenAI tools.

[View Generative AI: Prompt Like a Pro](#) [25]

Getting Things Done

The Getting Things Done course offers 1.0 credit hours in Personnel/Human Resources and will enable participants to engage more effectively with their to-dos and commitments

[View Getting Things Done](#) [26]

Gift Cards: Dos And Don'ts

The Gift Cards: Dos and Don'ts course offers 1.0 credit hours in Finance, and will provide participants with the framework of the requirements of using gift cards to accomplish various purposes identified by the CU System Campuses.

[View Gift Cards: Dos And Don'ts](#) [27]

Gift Fund Management

The Gift Fund Management course offers 2.0 credit hours in Finance and will provide University of Colorado employees with a basic framework for understanding the gift environment, a roadmap for how gifts are processed, and the tools for meeting all the requirements for gift acceptance.

[View Gift Fund Management](#) [28]

How CU Spends \$1

The How CU Spends \$1 course offers 1.0 credit hours in Finance and will provide participants with an overview of the funding structure for the entire CU System, including individual campuses, the background of higher education funding within the state of Colorado, and how CU spends each \$1 of state allocated funding.

[View How CU Spends \\$1](#) [29]

Human Asset Management: Delivering Helpful Feedback - The Rules from the Psychology Lab

The Human Asset Management: Delivering Helpful Feedback – The Rules from the Psychology Lab course offers 2.0 credit hours in Personnel/Human Resources and will arm participants with techniques used in delivering helpful feedback and an appreciation for why it

is important to do it well. The presentation outlines sources of resistance to feedback, seven specific feedback skills and when to use them, and practical benefits.

[View Human Asset Management: Delivering Helpful Feedback - The Rules from the Psychology Lab](#) ^[30]

Identifying Fraudulent Transactions

The Identifying Fraudulent Transactions course offers 1.0 credit hours in Behavioral Ethics and will provide participants with an overview of their role in identifying fraudulent transactions, and the “red flags” to look for common to higher education.

[View Identifying Fraudulent Transactions](#) ^[31]

Information and Technology Risks at CU: What You Should Know

Information and Technology Risks at CU: What You Should Know course offers 1.0 credit hours in Auditing (Governmental) and will provide participants with a basic understanding of all the various types of audits that take place at the University of Colorado.

[View Information and Technology Risks at CU: What You Should Know](#) ^[32]

Introduction to Forensic and Investigative Accounting

The Introduction to Forensic and Investigative Accounting course offers 1.0 credit hours in Auditing (Governmental) and will provide participants with an overview of forensic accounting.

[View Introduction to Forensic and Investigative Accounting](#) ^[33]

It's Accrual World

The It's Accrual World course offers 1.0 hours in Accounting (Governmental) and will provide participants with a basic understanding of accruals and why they are necessary, especially in the context of fiscal year-end processing.

[View It's Accrual World](#) ^[34]

It's Accrual World: Gearing Up for Fiscal Year-End

The It's Accrual World: Gearing Up For Fiscal Year-End course offers 2.0 hours in Accounting (Governmental) and will provide a basic understanding of the importance of fiscal year-end, to include accruals, the tasks that need to be completed, and deadlines.

[View It's Accrual World: Gearing Up for Fiscal Year-End](#) ^[35]

Journal Entry Spreadsheets

The Journal Entry Spreadsheets course offers 1.0 credit hours in Computer Software and Applications and will provide participants with demos and tips on using the spreadsheet journal entry function in the PeopleSoft Finance System.

[View Journal Entry Spreadsheets](#) [36]

Leading Yourself through Change: The Power of Habit

The Leading Yourself through Change: The Power of Habit course offers 1.0 credit hours in Personal Development and will provide participants with a step-by-step approach to understanding and reshaping their personal/professional habits. The process of leading internal change can then be applied to leading external change for teams and projects.

[View Leading Yourself through Change: The Power of Habit](#) [37]

Make it Interactive: Tools to Boost Your Trainings, Webinars, and Meetings

The Make it Interactive: Tools to Boost Your Trainings, Webinars, and Meetings course offers 1.0 credit hours in Communications and Marketing.

[View Make it Interactive: Tools to Boost Your Trainings, Webinars, and Meetings](#) [38]

Managing Projects When Your Title Isn't Project Manager

The Managing Projects When Your Title Isn't Project Manager course offers 1.0 credit hours in Personnel/Human Resources.

[View Managing Projects When Your Title Isn't Project Manager](#) [39]

Managing Remote Work: Lessons Learned and Future Challenges

The Managing Remote Work: Lessons Learned and Future Challenges course offers 1.0 credit hours in Management Services and will provide participants with best practices for managing projects and teams in remote work environments, including evaluation and planning for the different work scenarios of the future.

[View Managing Remote Work: Lessons Learned and Future Challenges](#) [40]

Mastering Excel: Filter, Combine, and Separate Data and the Match Formula

The Mastering Excel: Filter, Combine, and Separate Data and the Match Formula course offers 2.0 credit hours in Computer Software and Applications and will provide participants with a comprehensive understanding of formulas and techniques to efficiently manage data in Excel and visualize this data in charts and dashboards. Specifically, this class covers filtering ranges, freezing panes, combining and separating data, and the Match formula.

[View Mastering Excel: Filter, Combine, and Separate Data and the Match Formula](#) [41]

Mastering Excel: If, SumIf, and CountIf Formulas

The Mastering Excel: If, SumIf, and CountIf Formulas course offers 2.0 credit hours in Computer Software and Applications and will provide participants with a comprehensive understanding of formulas and techniques to efficiently manage data in Excel and visualize this data in charts and dashboards. Specifically, this class covers the CountIf, SumIf, Countifs,

Sumifs, and IF formulas.

[View Mastering Excel: If, SumIf, and CountIf Formulas](#) [42]

Mastering Excel: XLOOKUP and VLOOKUP Formulas

The Mastering Excel: XLOOKUP and VLOOKUP Formulas course offers 2.0 credit hours in Computer Software and Applications and will provide participants with a comprehensive understanding of formulas and techniques to efficiently manage data in Excel and visualize this data in charts and dashboards. Specifically, this class covers the XLOOKUP and VLOOKUP formulas.

[View Mastering Excel: XLOOKUP and VLOOKUP Formulas](#) [43]

Mastering m-Fin: Financial Detail Reports

The Mastering m-Fin: Financial Detail Reports course offers 1.0 credit hours in Computer Software and Applications and will provide participants with an overview of both the m-Fin Financial Detail Report and the m-Fin Financial Detail II Report, including when these reports are useful, which extra data options are available, and how to interpret the reports within the University's context.

[View Mastering m-Fin: Financial Detail Reports](#) [44]

Mastering m-Fin: Running & Scheduling Reports

The Mastering m-Fin: Running & Scheduling Reports course offers 1.0 credit hours in Computer Software and Applications and will present participants with the different options for running, saving, and scheduling reports in the CU-Data financial reporting system.

[View Mastering m-Fin: Running & Scheduling Reports](#) [45]

Mastering m-Fin: SpeedType One-Liner & Resource Deficit Reports

The Mastering m-Fin: SpeedType One-Liner & Resource Deficit Reports course offers 1.0 credit hours in Computer Software and Applications and will provide participants with an overview of both the m-Fin SpeedType One-Liner Report, and the m-Fin Resource Deficit & Abnormal Balance Report, including when these reports are useful, which extra data options are available, and how to interpret the reports within the University's context.

[View Mastering m-Fin: SpeedType One-Liner & Resource Deficit Reports](#) [46]

Mastering m-Fin: Trial Balance Report

The Mastering m-Fin: Trial Balance Report course offers 1.0 credit hours in Computer Software and Applications and will provide participants with an overview of the m-Fin Trial Balance Summary Report, when this report is useful, which extra data options are available, and how to interpret the report within the University's context.

[View Mastering m-Fin: Trial Balance Report](#) [47]

Mastering m-Fin: Using m-Fin Launch

The Mastering m-Fin: Using m-Fin Launch course offers 1.0 credit hours in Computer Software and Applications and will demonstrate the use of the m-Fin Launch option in CU-Data to produce a list of appropriate m-Fin reports based on a SpeedType, Org, Program, or Project.

[View Mastering m-Fin: Using m-Fin Launch](#) [48]

Micro-aggressions and Micro-affirmations: Awareness in the W?orkplace

The Micro-aggressions and Micro-affirmations: Awareness in the W?orkplace course offers 2.0 credit hours in Personnel/Human Resources and will provide participants with a basic understanding of the impacts of micro-aggressions in the work environment and techniques to address these impacts with kindness and respect.

[View Micro-aggressions and Micro-affirmations: Awareness in the W?orkplace](#) [49]

Microsoft Excel: Working with Large Datasets

The Microsoft Excel: Working with Large Datasets course offers 2.0 credit hours in Computer Software and Applications and will provide participants with an overview of the various formulas and functions Microsoft Excel offers to manage data and get to the desired outcome efficiently.

[View Microsoft Excel: Working with Large Datasets](#) [50]

Month-End Financial Close

The Month-End Financial Close course offers 1.0 credit hours in Accounting (Governmental) and will provide participants with a basic understanding of the importance of month-end financial close, the tasks they need to complete, and the deadlines that may impact them.

[View Month-End Financial Close](#) [51]

Moving into Change: Understanding, Accepting, and Leading Transformations

The Moving into Change: Understanding, Accepting, and Leading Transformations course offers 2.0 credit hours in Personal Development and will provide participants with a toolkit of change facilitation theories, change anticipation/acceptance activities, change communication tools, and transformational leadership skills.

[View Moving into Change: Understanding, Accepting, and Leading Transformations](#) [52]

PeopleSoft Query: Creating Queries in FIN 9.2

The PeopleSoft Query: Creating Queries in FIN 9.2 course offers 4.0 credit hours in Computer Software and Applications and will provide participants with an overview on the key skills they need to create queries within the PeopleSoft Finance System.

[View Creating Queries in FIN 9.2](#) ^[53]

PeopleSoft Query: Running Queries in FIN 9.2

The PeopleSoft Query: Running Queries in FIN 9.2 course offers offers 1.0 credit hours in Computer Software and Applications and will provide participants with an overview on the key skills they need to run and interpret queries within the PeopleSoft Finance System.

[View Running Queries in FIN 9.2](#) ^[54]

PeopleSoft Reports in FIN 9.2

The PeopleSoft Reports in FIN 9.2 course offers 1.0 credit hours in Accounting (Governmental) and will provide participants with the key skills they need to decide when and how to run and interpret reports within the PeopleSoft Finance System.

[View PeopleSoft Reports in FIN 9.2](#) ^[55]

Performance Improvement Using the REST Methodology

The Performance Improvement Using the REST Methodology course offers 1.0 credit hours in Personal Development and will provide participants with techniques to address the culture of busyness that pervades modern life so they can learn how to Improve work performance and achieve goals without the exhaustion and burnout.

[View Performance Improvement Using the REST Methodology](#) ^[56]

Presenter Certification Program: Content and Delivery

The Presenter Certification Program: Content and Delivery course offers 1.0 credit hours in Communications and Marketing and will provide participants with the knowledge and skills needed to improve the quality of their professional presentations in the areas of audience needs identification and oral delivery.

[View Presenter Certification Program: Content and Delivery](#) ^[57]

Presenter Certification Program: Elements of Engagement

The Presenter Certification Program: Elements of Engagement course offers 1.0 credit hours in Communications and Marketing and will provide participants with the knowledge of how, when, and why to build interactivity into their meetings, training sessions, and other events.

[View Presenter Certification Program: Elements of Engagement](#) ^[58]

Presenter Certification Program: Virtual Presentations

The Presenter Certification Program: Virtual Presentations course offers 1.0 credit hours in Communications and Marketing and will provide participants with the knowledge and skills needed to improve the quality of their online presentations, meetings, and other events.

[View Presenter Certification Program: Virtual Presentations](#) [59]

Presenter Certification Program: Visual Design and Resources

The Presenter Certification Program: Visual Design and Resources course offers 1.0 credit hours in Communications and Marketing, and will provide participants with the knowledge and skills needed to improve their professional presentations through the effective use of slides, handouts, posters, and other resources.

[View Presenter Certification Program: Visual Design and Resources](#) [60]

Process Mapping for Efficiency and Cross-Training

The Process Mapping for Efficiency and Cross-Training course offers 1.0 credit hours in Management Services and will provide participants with a team-based method for identifying, integrating, and diagramming processes between departments and individuals.

[View Process Mapping for Efficiency and Cross-Training](#) [61]

Red Flag Identity Theft Prevention Program

The Red Flag Identity Theft Prevention Program course offers 1.0 credit hours in Auditing and will provide participants with basic tools to detect and prevent identity theft (against borrowers, students, and customers) and help prevent losses to the University.

[View Red Flag Identity Theft Prevention Program](#) [62]

Slack/Trello: A Collaborative Dream Team

The Slack/Trello: A Collaborative Dream Team course offers 1.0 credit hours in Management Services and will provide participants with an overview of two collaborative tools that can be used to manage team business processes through project management and conversational channels.

[View Slack/Trello: A Collaborative Dream Team](#) [63]

Understanding Internal Controls

The Understanding Internal Controls course offers 2.0 credit hours in Auditing (Governmental) and will provide participants with an overview of internal controls and how they help achieve management's objectives.

[View Understanding Internal Controls](#) [64]

Understanding and Preparing the Statement of Cash Flows

The Understanding and Preparing the Statement of Cash Flows course offers 2.0 credit hours in Accounting (Governmental) and will provide participants with an overview of how to prepare a cash flow statement, and how to explain the statements to the lay user.

[View Understanding and Preparing the Statement of Cash Flows](#) [65]

Understanding University Tax Liabilities: Tax Exempt Status, Sales Tax, Unrelated Business Income, and Expense Reimbursements

This course offers 1.5 credit hours in Taxes and will provide insights and instruction on the impact that Sales Taxes and Unrelated Business Income Tax have on the University. In addition, there will be a discussion on Business Expense Substantiation rules under the Accountable Plan of the University.

[Understanding University Tax Liabilities: Tax Exempt Status, Sales Tax, Unrelated Business Income, and Expense Reimbursements](#) [66]

What Makes an Effective Leader?

The What Makes an Effective Leader? course offers 1.5 credit hours in Personal Development and will teach participants strategies to address a variety of leadership challenges. The instructor draws on the work of Daniel Goleman, presenting his proposed six leadership styles and how and when they should be used.

[View What Makes an Effective Leader?](#) [67]

The University of Colorado is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org [68].



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[49] <https://www.cu.edu/controller/cpe-cpas/course-catalog/micro-aggressions-and-micro-affirmations-awareness-workplace> [50] <https://www.cu.edu/controller/cpe-cpas/course-catalog/microsoft-excel-working-large-datasets> [51] <https://www.cu.edu/controller/cpe-cpas/course-catalog/month-end-financial-close>
[52] <https://www.cu.edu/controller/cpe-cpas/course-catalog/moving-change-understanding-accepting-and-leading-transformations> [53] <https://www.cu.edu/Node/68959> [54] <https://www.cu.edu/controller/cpe-cpas/course-catalog/peoplesoft-query-running-queries-fin-92> [55] <https://www.cu.edu/controller/cpe-cpas/course-catalog/peoplesoft-reports-fin-92> [56] <https://www.cu.edu/controller/cpe-cpas/course-catalog/performance-improvement-using-rest-methodology> [57] <https://www.cu.edu/controller/cpe-cpas/course-catalog/presenter-certification-program-content-and-delivery>
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