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Fiscal Roles in Financial Systems and Reporting [1]

Employee fiscal roles and responsibilities provide the framework within which financial management occurs. To read more about this topic, see APS 4014 Fiscal Roles and Responsibilities [2].

Watch the Mini-Webinar

Tips

- There are four fiscal roles: Officer, Fiscal Principal, Fiscal Manager, and Fiscal Staff.
- The Fiscal Principal and Fiscal Manager roles are defined at multiple levels (Organization, Program, or Project), so you need to specify where you are making an update.
- Fiscal roles are defined in the PeopleSoft Finance System and determine access and privileges in other Systems. To learn more about access and roles to fiscal systems, including Peoplesoft Finance, CU Marketplace, and Concur Travel & Expense, see the Access & Training Requirements [3] guide.
- You can run an m-Fin report to view fiscal role assignments - see m-Fin Fiscal Roles [4] and m-Fin Fiscal Roles II [5]. Both these reports can be found in CU-Data under **Team content > Finance > Look Ups**.
- To add or update fiscal roles for an Org, Project, or SpeedType, complete and submit the appropriate ChartField Request form [6].

Have a question or feedback?

Questions & Feedback [7]

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This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

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