OFM Training

In-Process Report Training

Class Description: This 2.5-hour class provides an overview of the In-Process general ledgers (GL 7110-7140), Current Period Clearing Account general ledger (GL 9920) and the reports used to monitor them. The class covers the types of transactions included on the In-Process reports, examples of common In-Process problems, and tools for identifying and correcting the problems. The last part of the class provides time for participants to review their own agency's unbalanced In-Process reports, identify the likely action needed, and prepare correcting journal entries.

Target Group: Lead workers/supervisors responsible for training and monitoring the staff assigned to review and clear the In-Process reports.

Class Objectives: At the conclusion of this class, participants should be able to:

- Analyze the In-Process reports.
- Understand the purpose of the In-Process reports and the importance of clearing them timely and correctly.
- Understand how to clear the in-process reports.
- Take the knowledge/skills back to their agency and train other staff.