

Bridget Koetsch

From: Bridget Koetsch
Sent: Tuesday, February 25, 2025 10:28 AM
To: All Staff; fcsn@positivelypartners.org; Rachel Lefevre
Cc: Business Office
Subject: IMPORTANT CHANGES - in coding all expenses
Attachments: Account Class Customer Updated Feb 24, 2025.pdf

Hi Everyone,

We have begun to use a new financial grant management software – KarmaSuite, that will require some changes in the way we code expenses.

I have attached the most up to date list of Coding information. This can also be found on the Staff Portal

You may have noticed that our req forms now require three pieces of coding information and this is why. All forms have the acceptable information in the drop down menus. Please reach out if you find errors in omissions or codes.

PLEASE TAKE NOTE OF CHANGES

Account Numbers – at the bottom of excel have been reduced to just this list in an effort to increase accuracy with our accounting practices. Some accounts have been removed, some have been combined (ex. Printing and Copying), and some have been added (Advertising-Catering etc)

Class – will NO longer be digits- instead, there is a list of suggested options that may correlate with the Customer Codes

Customer Codes (these used to be classes) – These reflect the project that you are charging to. You may notice some have been removed and there are also some new ones.

Reminder all pieces of coding information will need to follow this format before sending to federationforchildrenwithspecialneeds@bill.com

ALSO – DIVVY transactions will all need to follow this format as well (Not all staff are using this system)

Please reach out if you have any questions,

Bridget Koetsch, M.Ed. (She/Her/Hers) ([Why does this matter?](#))

Finance Manager

Federation for Children with Special Needs



FCSN – *Engage, Educate, Empower*

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