Uploading Financial Information Steps:
1. Format Trial Balance File to include only two relevant columns: Account and Amount.
2. Upload Formatted File into the Tool and Validate
3. If no exceptions, the upload is complete – certify.
4. If exceptions, review the report.
5. Map new accounts to the UCOA crosswalk.
6. Re-Validate
7. Upload is complete – certify.

Mapping
Map your Financial Accounts to the UCOA

Financial Data
Upload Trial Balances in a File, or Enter data manually

Exception Report

Upload Complete