

Your Scan Instructions

Everything you need to complete your scan — about an hour of gathering, then 3 business days to your scorecard.

01 What happens next

- ☐ Watch for your secure upload link
A private Box.com folder, created for your organization only — documents never travel as email attachments
- ☐ Gather the documents below
Most teams need about an hour
- ☐ We review and score
Software assembles, a person verifies every figure against its source
- ☐ Your scorecard arrives in 3 business days
One page: your score out of 100 and your top gaps, in plain English

02 What to gather

- ☐ Most recent federal award notices (all active awards)
- ☐ Latest general ledger export
Excel or CSV is fine
- ☐ Last quarter's timesheets or time certifications
- ☐ Procurement files for your 5 largest purchases
- ☐ Most recent financial reports filed to your funding agencies
- ☐ Last year's single audit report, if you have one
First-timers: skip this one

03 Good to know

- ☐ Nothing is shared
Your documents stay in your private folder and are never disclosed
- ☐ No obligation
The scan is free whether or not you ever work with us
- ☐ We are not your auditors
We prepare documents; your auditor's opinion stays entirely theirs