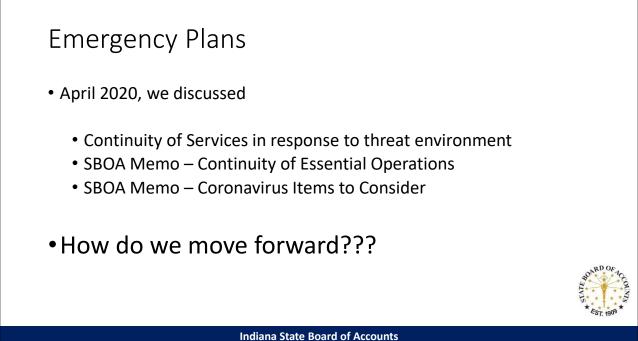
# The Aftermath

Where do we go from here?

**Recorders Spring 2021** 

#### 1



# Proactive, not Reactive

- Look Back
  - What have we learned
  - Correct any issues
- Take Stock
  - What worked and what didn't
  - What changes do we need to make
- Plan for future
  - Review and revise plans
  - Prioritize plan



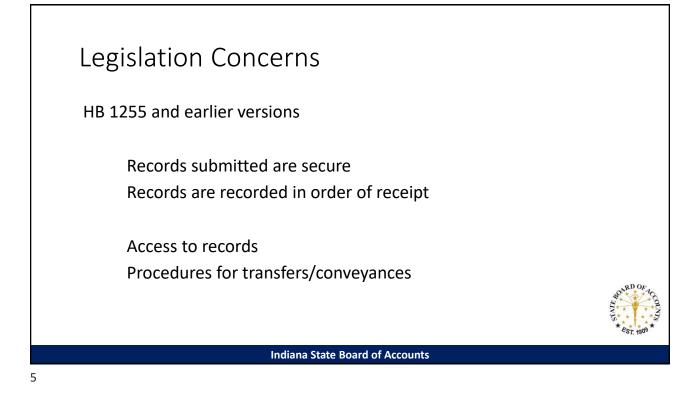
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### Look Back

- What worked and what didn't?
- What could have worked better?
  - Designated successor
  - Remote Access
  - Appointment only
  - Staggered work force
  - Remote work



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## Take Stock

- Where are you now?
  - Is everything caught up?
  - Have you reviewed the work from the past year?
- What do you have and what do you still need?
  - Shields and PPE
  - Equipment and technology
- What procedures and policies need to be reviewed and updates?
  - Order of Succession
  - Internal controls



### Review

- If you haven't already done so, review the work from last year.
- Financial records are up to date
- Review IT or Banking Access given to designated individuals
- Any work that was done under procedures established to address the pandemic needs to be reviewed for completeness and accuracy
  - Work done remotely
  - Staggered work force with less oversight
  - Work that was catch up when office had been closed



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# Plans

- What still needs to be done set your plan to address those needs
- Set a priority of those needs
- Determine a cost/budget
- Set a time-line for the plan
- Update your Emergency plan keep it current and relevant



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