

Finance Resource Access Audit Scorecard

A working sheet for close, forecasting, KPI definitions, policy references, and budget-owner handoffs. Find the weak links before adding another shortcut.

A reliable reference has a current destination, a clear owner, appropriate access, and a date to review it.

Check the references people reach for

For each checkpoint, mark 0 = unclear or missing, 1 = partly in place, 2 = confirmed and owned. Note the next action—not just the score.

CHECKPOINT	0	1	2	NEXT ACTION / OWNER
The current close calendar is easy for contributors to locate.	☐	☐	☐	
Forecast assumptions have a named owner and a clear review date.	☐	☐	☐	
KPI definitions point to the source the team treats as current.	☐	☐	☐	
Budget owners know where to send questions or intake requests.	☐	☐	☐	
Policy references link to an approved, current version.	☐	☐	☐	
A stale or moved destination has a clear update owner.	☐	☐	☐	
Permission and sign-in rules are checked before a link is shared.	☐	☐	☐	
The team can tell which system remains the official record.	☐	☐	☐	

TOTAL ____ / 16 First gap to address

This score is a discussion aid, not a benchmark or control assessment. Start with one gap and assign an owner.

Map one handoff at a time.

Pick one recurring question. Trace the route from the person asking to the approved resource they need. Keep confidential records in the systems and access controls your organization already uses.

Resource inventory

RESOURCE	CURRENT LOCATION	OWNER	REVIEW DATE

Check the route before sharing

DECISION	WRITE IT DOWN
Who needs this resource?	
Which destination is approved?	
Does access require sign-in or specific permissions?	
Who checks the link and content on the review date?	
Which system remains the official record?	

If you test a physical shortcut

A standard NFC tag opens the URL assigned to it when tapped with a compatible phone. It does not store financial statements, customer account data, credentials, approvals, or transaction records. A phone and, for online destinations, network access may be needed.

Planning worksheet only. Follow your organization's information-security, privacy, records, and finance policies. This is not accounting, legal, credit, or investment advice.