



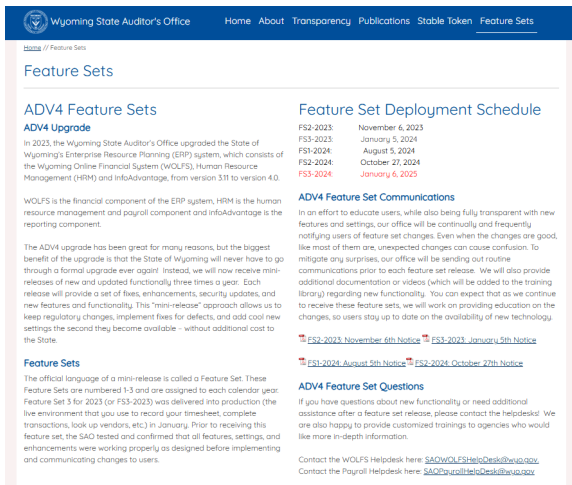
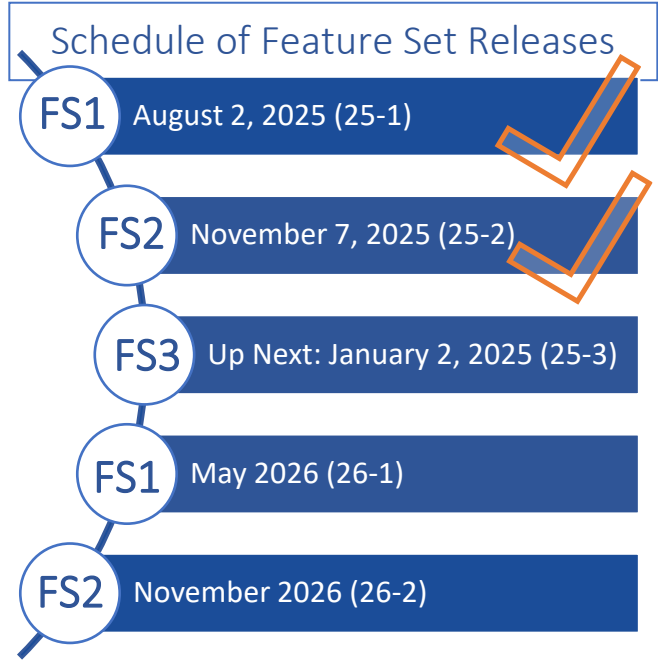
ADV4 Feature Set Education Bulletin: January 2026

Out With the Old, In With the New

As the year wraps up and the seasons shift, Advantage is ringing in the changes too! Let's kick off the new year with a bang—your toolkit just got a major upgrade.

As we continue to release new functionality, we will continue to release corresponding Education Bulletins as we go. Users can catch up on some of our previous feature sets and improvements on the SAO website.

New to this? Read the full recap on the *Feature Set Landing Page* of our site: sao.wyo.gov/feature-sets.



What's New?

Welcome to the first update of the new year! We are kicking off 2026 with a collection of enhancements that are designed to help you work with more confidence and less guesswork.

This release is all about putting information at your fingertips. We know that navigating complex systems can be challenging, so our focus this quarter has been on transparency and instant support. From the new help icon on fields within Advantage to real-time tracking for returned checks, these features are built to save you time and eliminate manual follow-ups.

In this release, you'll see:

- **Instant Guidance:** How our new **Field Instruction** help icons act as your in-app guide for completing complex processes.
- **Check Transparency:** Self-service tracking for undeliverable checks—no Help Desk call required.
- **New Configuration Table for Units:** Help your agency eliminate bulky GEMs by setting requirement standards at the Unit level.



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- Compliance Updates: Important terminology changes to the EELV transaction to stay aligned with federal standards.

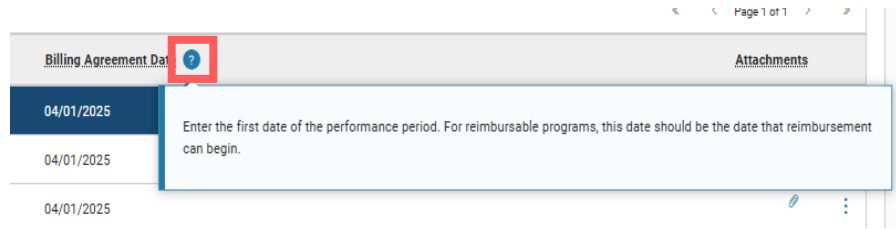
Read on to see how these little helpers will make a big impact on your daily tasks!

Meet Your New Helper: Field Instructions

Have you noticed the small blue question mark icons appearing throughout the Advantage application? Think of these as your in-app experts.

The State Auditor's Office has been integrating new **Field Instructions** directly into the application to provide you with specific instructions, definitions, tips and tricks, or informational insight right at your fingertips. If you click on the **Field Instructions Icon** a message window appears. The information in the window is intended to help direct you on how to complete the field.

In the image to the right, you'll see an icon and the message window once the icon is clicked.



Keep an eye out for these icons as we continue to expand this feature across the entire application. Give them a click—you might discover a helpful tip you didn't know before!

Putting the “FUN” in FUNd Requirements!

We are excited to introduce the **Fund Unit Requirement Table (FUNREQ)**, a significant upgrade designed to give you more granular control over your budget entries on Advantage transactions. For years, the standard **Fund Requirement Table (FDREQ)** lacked the ability to manage requirements at the unit level—a frequent pain point for our users. The new FUNREQ table changes that.

Now you will be able to prevent your transactions from submitting using units that require a program, task code, or more based on your preferences. This never-before provided ability allows for unit-level control based on your agency needs in both spending and revenue transactions with automated continuity year after year—once you add the current fiscal year, the annual NYTI process will copy and paste that record for the next fiscal year until you deactivate the record.

The image below shows an example entry where a user has entered a unit to have specific COA requirements.



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Edit Fund Unit Requirements

Save Save & Close Cancel

* Required fields

* Fiscal Year: 2026

* Unit: 0101

* Sub Activity: Prohibited

* Function: Optional

* Sub Location: Prohibited

* Program Period: Required

* Task Order: Prohibited

Department: 003

* Accounting Classification: General

* Reporting: Optional

* Sub Function: Optional

* Program: Required

* Task: Required

* Fund: 001

* Activity: Optional

* Sub Reporting: Prohibited

* Location: Optional

* Phase: Optional

* Sub Task: Optional

The Old Way: The FDREQ table offered fund-level requirements but couldn't drill down into specific units.

The FUNREQ Way: You can now mandate specific codes for individual Fund

and Unit combinations. This ensures that every revenue or spending transaction is processed with exactly the right COAs for your agency's needs.

We encourage users to go take a look at the FUNREQ table and compare it to the FDREQ table to see if the new ability to control requirements at the Unit level will be helpful for you.

New for 2026: Instant Tracking for Undeliverable Checks

Each year, the State Auditor's Office (SAO) receives hundreds of undeliverable checks returned by the United States Postal Service (USPS). That's a whole lot of mail! Historically, when a check was returned due to an insufficient or outdated address, the SAO placed the vendor on hold and logged the check in an internal file. To find out if a check was returned or delayed, agency users previously had to contact our Help Desk for manual verification from an internal log that only we had access to.

Starting in January, we are bringing that data directly to you! All paper checks that are undeliverable are received by our office. At that time, we will continue to put the vendor on hold and return it to the agency. But first, we will enter the check status information into the CHREC (Check Reconciliation) table in Advantage so all undeliverable information can be seen by agency users. Moving this internal log into Advantage will provide agency users with immediate information at the click of a button—eliminating the need for help-desk inquiries regarding returned mail.

When searching for a check in the CHREC table (image below), you can now view the following details directly in the record line:

CGI - CHREC

Check Reconciliation

Leisha Monroe Accountant

~ Filters

Check / EFT: 145
Transaction Date: MM/DD/YYYY
Amount: \$100
Transaction ID: MM/DD/YYYY
Status: Warranted
Disbursement Type: MM/DD/YYYY

Apply Reset

Check / EFT	Amount	Status	Undelivered Reason	Undelivered Date	Comments
000000046	\$10.00	Warranted	Incorrect or Insufficient Address	02/27/2025	Check sent to dept

- Undelivered Reason: Why the USPS was unable to deliver the check.
- Undelivered Date: When the mail was returned to the SAO.



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- Comments: Additional context regarding the status or handling of the check.

But wait! There's more!

To ensure this tool is useful immediately, the SAO has back-logged all returned check information for calendar year 2025. This allows you to track any check that has not yet been escheated (checks not deposited within the last 13 months). Even after a check is re-sent and successfully cashed, information about the undeliverable status remains as a permanent historical record, providing a full document history of the payment's journey.

As we move into 2026, we hope this added transparency within the Advantage system simplifies your workflow and speeds up vendor resolutions.

Compliance Update: Employment Eligibility Verification (EELV) Document Alignment

Please be advised that the "Employment Status" field has been revised to align with the changes introduced to the Federal **Form I-9** earlier this year. Specifically, the category **A Noncitizen** has been replaced by the updated designation:

Alien Authorized to Work. This change ensures our internal documentation mirrors current federal terminology and keeps records in compliance.

Looking Ahead

The State Auditor's Office has ambitious plans for Advantage in 2026, so stay tuned for exciting updates throughout the year! To give you a sneak peek... we are ramping up security features and plan to roll-out multi-factor authentication in March 2026. FS1-2026 contains many cool, new enhancements and our office plans to deploy this FS sooner rather than later—with an expected deployment of May 2026. We are currently testing Advantage Engage Hub and hope to leverage this pre-built digital application to modernize some of our manual processes. Work on performance budgeting and Insights, (a new reporting platform), will also begin at the start of the new year! We can't wait to show you the awesome new features for the new year.