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# **Frevvo E-Business Forms Procedures**

## **Account Justification and Documentation Form**

# Frevvo Form – Account Justification and Documentation

## Account Justification and Documentation

### To be completed by the requesting department

#### This new account request is for:

- Uptown
- Health Science Center
- School of Public Health and Tropical Medicine

#### Organization #

#### Attachment (if applicable)

#### Are you requesting a plant fund account (77-ledger)?

- Yes
- No

#### Department Name

#### Account Long Name

#### Account Short Name

NOTE: Fields shaded in yellow are required.

1. Click the appropriate radio button to choose the campus of the organization requesting the new account
  - This selection will determine workflow to the appropriate dean's office
2. Click the Add Files button to open your File Explorer to select a file for upload and attachment to the form, if applicable
3. If you are specifically requesting a plant fund account (77-ledger), click Yes; otherwise, click No
4. Include your department (org) name
5. Include the long name of the account being requested (up to 250 characters)
  - This is the official name of the account that appears on most reports
6. Include a shortened name of the account (up to 21 characters)
  - Used in some systems to fit in shortened fields for name display

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## Responsible Person

1

First Name

Last Name

Tulane Email Address ⓘ



name@tulane.edu

## Purpose of the Account

2

## External restrictions by donors or agencies

3

## Internal restrictions (if applicable)

4

1. Include the name and email address of the new account's responsible person (owner)
2. Enter an explanation of the purpose of the account
3. Enter a brief explanation of external restrictions placed on the account by donors or other outside agencies
4. Enter a brief explanation of internal restrictions or designations placed on the account

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Source of Funds **1**

How often is revenue received each fiscal year? **2**

Start Date **3** Termination Date (if applicable) **4**

Account to charge in case of deficit **5**

1. Enter a brief explanation of the source of funding for the account, if applicable
2. Enter a brief explanation as to the number of times revenue is received during the academic year, if applicable
3. Enter the date of origin for the account or the date the account is expected to become active
4. If there is a predetermined account termination date, enter the date (not required)
5. Enter an account number to charge in case a deficit occurs at the end of the life of an active period for the account

NOTE: Yellow fields indicate required fields on all Frevvo forms

# Frevvo Form – Account Justification and Documentation

## Requestor Information

First Name

Peter

1

Last Name

Simonson

Title

2

Tulane Email Address

psimons@tulane.edu

## Requested on Behalf of (if applicable)

First Name

3

Last Name

Tulane Email Address ⓘ

name@tulane.edu

## Enter the Department Head associated with this request.

First Name

4

Last Name

Tulane Email Address ⓘ

name@tulane.edu

➔ Submit for Dept. Head Approval

5

1. Your name and Tulane email address will default here when you initiate the form
2. Enter your job title
3. (Optional) If you are requesting the new account on behalf of another staff member, include their name and email address
4. Enter the name of the Department Head authorized to approve the new account request
5. Click the Submit for Dept. Head Approval button to send the request to the Department Head entered in the field above (#4)

After the department head approves, the form will route to the appropriate dean's office for approval (if required by your school). The form will then route to either HSC Financial Services or the uptown Accounting Office for final processing. Once the account is created, the initiator will receive an emailed pdf copy of the form with workflow and attribute details.