

---

# Request for Account Organization Transfer (Org Change) Form Instructions

For basic navigation instructions of Frevvo forms, go here:

[https://tams.tulane.edu/sites/tams.tulane.edu/files/Frevvo\\_Basic\\_Navigation\\_Instructions\\_Revised.pdf](https://tams.tulane.edu/sites/tams.tulane.edu/files/Frevvo_Basic_Navigation_Instructions_Revised.pdf)

**IMPORTANT:** Please note that you may be required to log in with your Tulane user ID and password when you open the form

# Request for Account Organization Transfer Form



## REQUEST FOR ACCOUNT ORGANIZATION TRANSFER FORM

<b>Date of Request</b> 2/24/2021	<b>Requestor's Email Address</b> psimons@tulane.edu	
<b>Requestor's First Name</b> Peter	<b>Requestor's Last Name</b> Simonson	
<b>*Account Number</b>	<b>Current Org Number</b>	<b>Transfer to Org Number</b>

*\*NOTE: Grants (5##### accounts) cannot be transferred from their original organization.*

1. The greyed out Requestor information fields are write-protected and the default data is derived from your log-in
2. Include the account number that is being transferred, the organization number in which the account currently resides and the number of the org to which the account is being transferred
  - Yellow fields are required

# Request for Account Organization Transfer Form

---

## Check current outstanding balance types

- Actual  
 Budget

## Is payroll charged to this account?

- Yes  
 No

## Will the Responsible Person of the account change?

- Yes  
 No

## Justification for Org Change

1. If there are actual and/or budget balances that need to be transferred with the account, check the appropriate box
2. Indicate whether payroll is charged to the account being moved by checking the appropriate radio button
3. Click Yes or No to indicate whether the Responsible Person (owner) of the account is changing along with the org
  - If you click Yes, a field will open requiring you to include the new responsible person's name
4. Include the reason that the org change is required

# Request for Account Organization Transfer Form

Please list the name and email address of the Current and New Organization Department Heads below:

1

Current Dept Head First Name



Current Dept Head Last Name



Current Dept Head Tulane Email



2

New Dept Head First Name



New Dept Head Last Name



New Dept Head Tulane Email



3

Does the Current or New Organization belong to the School of Medicine?

Yes

No

*Note: Org change may be subject to Controller's approval.*

4

[Submit for Current Dept Head Org Approval](#)

1. Include the name and Tulane email address of the account's current organization's department head
2. Include the name and Tulane email address of the account's new organization's department head

NOTE: The form will route to both the current and new department heads for their approval

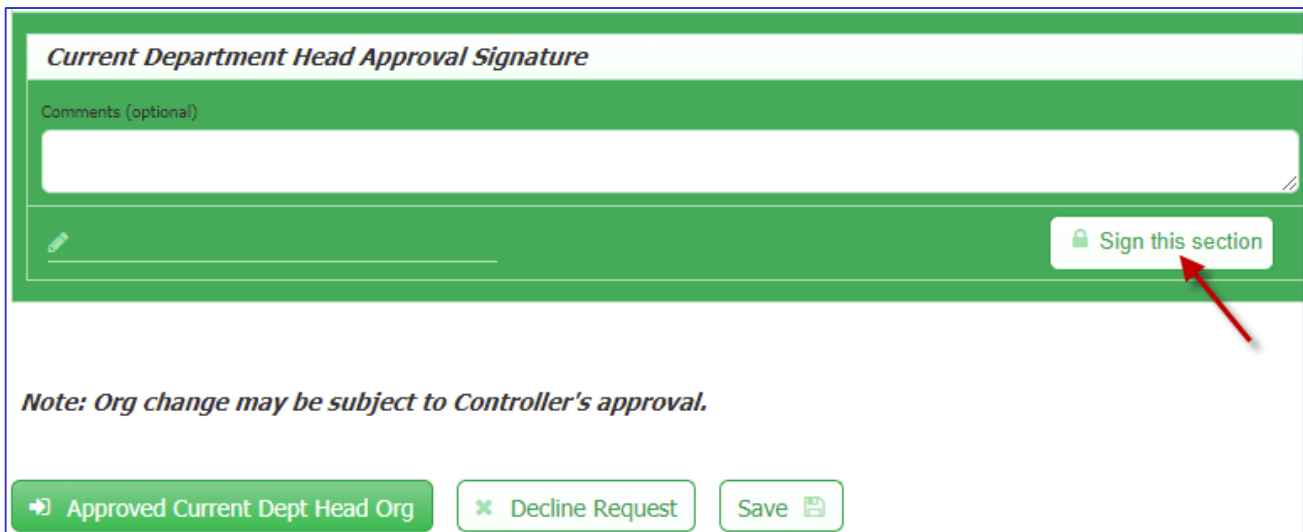
3. If the current org or the new org (or both) roll to the School of Medicine, check the Yes button; otherwise, check No
4. Once all required fields (yellow) are completed, click the Submit for Current Dept Head Org Approval button
  - The department head of the account's current org will immediately receive an email with a link to the form requesting their approval

# Request for Account Organization Transfer Approval

here to review and approve.' A red arrow points to the 'here' link. A red circle with the number '1' is next to the text." data-bbox="65 108 982 293"/>

Tulane Forms <tulaneforms@tulane.edu> | Simonson, Peter  
Dept Head Approval Required: Request for a Account Organization Transfer from Simonson, Peter

An Account Organization Transfer Request from Simonson, Peter has been submitted for your approval.  
For details, please click [here](#) to review and approve.



*Current Department Head Approval Signature*

Comments (optional)

[Sign this section](#)

*Note: Org change may be subject to Controller's approval.*

➔ Approved Current Dept Head Org   ✕ Decline Request   Save

1. The approver will receive an email notification containing a link to the form; click the link to open the form
2. Near the bottom of the form will be an approval field; add comments (optional) then click the “Sign this section” button to add your digital signature
  - Click the appropriate button to either approve or decline the request
  - If you choose to decline the request, a dialogue box will open requiring you to include the email address of the person you would like to send the rejection to
  - Only click the Save button if you are not ready to Approve/Decline but would like to come back to the form later





# Saving Interdepartmental Form

Interdepartmental Order Form Summary
Notes
View Attachments
Status And History

Folder Approvals
View Ledger Sums

**Interdepartmental Order**

Interdepartmental Order Form Summary

ID#: I-000194

---

**Interdepartmental Order Form Summary**

Effective Date       Prepared By

Expenditure Date       Category

**Order Information**

**Department to be Charged**      **Department to be Credited**

Department       Department

Received By       Delivered By

**Description**

Short Subject

Reference / Justification

**Ledger Sums**

Total Debits       Total Credits

**General Ledger Journal**

Account	Nat Acct	Dept Use	Activity Date	Line Description	Debit	Credit
221017	8851	0000	12/8/2014	2 boxes of Rubber Gloves	\$0.00	\$0.00

**Grants Management Journal**

Project	Task	Award	Exp Type	Comment	Debit	Credit

Submit Order
Submit Order with Plus One
Edit Journals
Edit Order Information
Add Note
Manage Attach
Close

Click Close button to save

**Tulane University BPM**

[To Do List](#)
[Watch List](#)
[Blank Forms](#)
[Administration Forms](#)
[Reports](#)
[Recent Content](#)

Process:       Stage:

Folder	Subject	Updated	Stage	Message
I-000194	Order to CHEMISTRY for Lab Supplies from Chemistry	12/8/2014 3:41:21 PM	Initiating Order	Journal Rows Updated

- If the form is to be submitted once a month, click on Close button to save it to your To Do List
- To open Order form, go to To Do List and select correct item. Single click to open.
- The Order form will stay on your To Do List until it is submitted.



# Print Report

Process	Action	Description
Accounting Folder Reports	Single Departmental Correction	
Accounting Folder Reports	Single General Journal Form	Download or print a single General Journal Form
Accounting Folder Reports	Single Interdepartmental Order	Download or print a single Interdepartmental Order report
Accounting Folder Reports	Single Transfer Of Funds	Download or print a single Transfer of Funds report

Select Single Interdepartmental Order

Single Interdepartmental Order (Accounting Folder Reports) - Internet Explorer  
https://metastorm.test.tulane.local/Metastorm/eReport.aspx?Map=AccountingFoldersReports&Action=SingleInterdepartmentalOrder&Service=Metastorm%20BPM%20Server&WebPartType=68

**Interdepartmental Order**  
Select an Order to populate the table to the right to narrow your search

Click on Print Button

Username  Number of previous days to list

Folders

Select Order to print

Page 1 of 1 Pdf

**Interdepartmental Order**

<b>From</b> Environmental Health & Safety	15130	<b>Effective Date</b> 12/08/2014
<b>To</b> CHEMISTRY	36430	<b>Expenditure Date</b>
<b>For</b> Order to CHEMISTRY for Lab Supplies from Chemistry		<b>Initiated</b> gpeacoc 12/08/2014
		<b>Received</b>
		<b>Delivered</b>

Proj/Account	Task Award	NA/Exp	Dept Use	Activity Date	Debit	Credit	Line Description
221017		8851	0000	12/08/2014	\$0.00	\$0.00	2 boxes of Rubber Gloves

- Select Interdepartmental Order Form that contains the Lab Supplies for Chemistry.
- Click on Print Reports to print a pdf report to bring to the Chemistry Department to retrieve your goods and close out the order