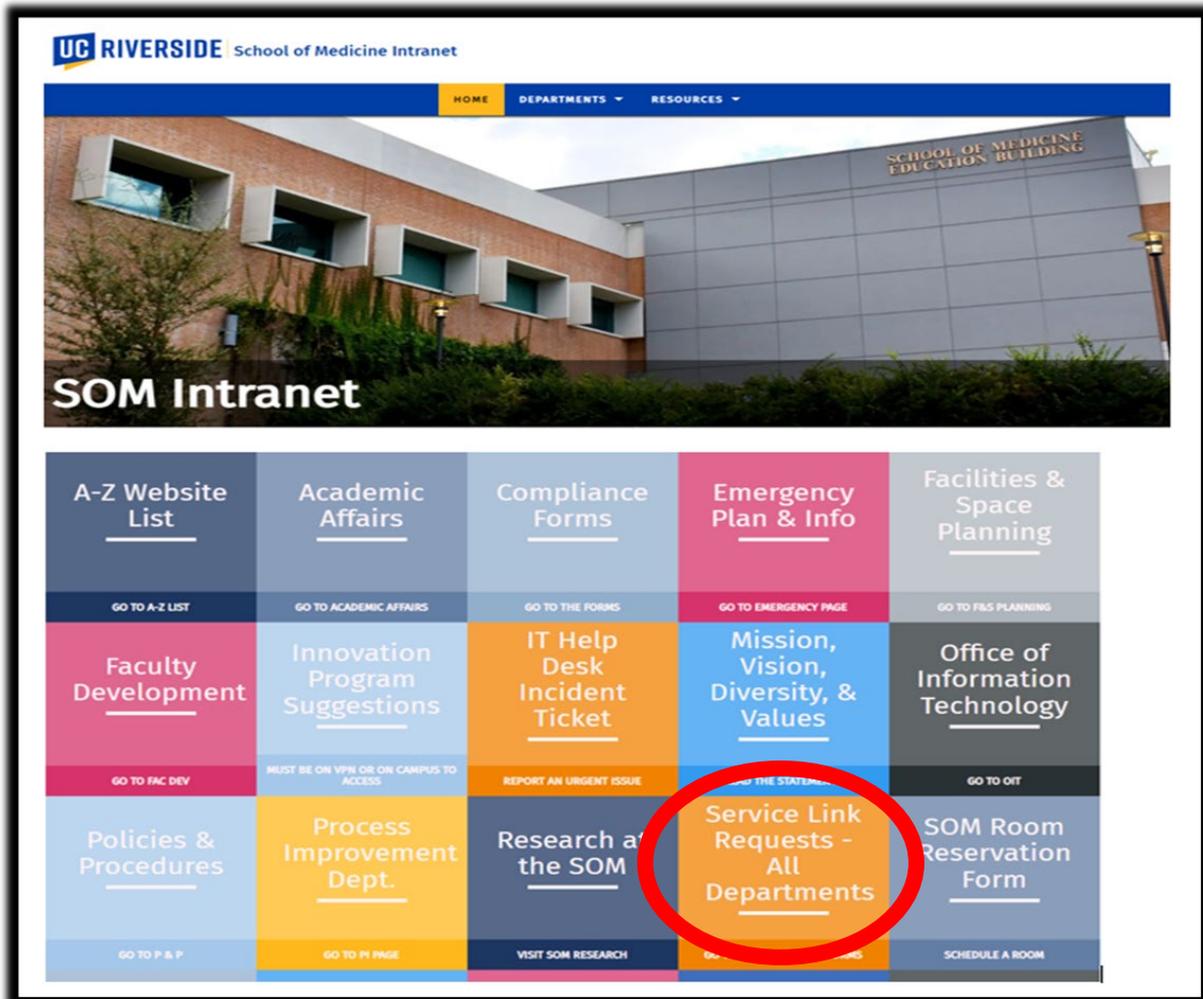


SOM Business Operations Fund Transfer/Swap Request Process

Purpose: The purpose of this document is to outline the process for entering a Fund Transfer or Fund Swap request using the Servicelink form.

Entering a request

1. On the SOM Intranet Homepage <https://medschoolintranet.ucr.edu/> select “ServiceLink Requests- All Departments”



2. In the Categories list, select “Business Operations.” In the Service Catalog section select “Fund Transfer Requests / Fund Swap Requests.”

The screenshot displays the UC Riverside Service Catalog interface. On the left is a 'Categories' sidebar with a blue header and white background. The categories listed are: Human Resources (5), Business Operations (7), Facilities (2), Faculty Development (1), OIT Security (4), OIT Services (14), and Sponsored Research and Prog... (1). The 'Business Operations' category is highlighted with a red border. The main content area has a blue header 'Service Catalog' and a sub-header 'Business Operations'. Below this, there are six service cards arranged in a grid. The first row contains three cards: 'Entertainment Preapproval Form', 'Fund Transfer Requests / Fund Swap Requests' (highlighted with a red border), and 'Generic Request for SOM Business Operations'. The second row contains three cards: 'Procurement Commodity Request', 'Procurement Service Request', and 'Reimbursement Request'. The third row contains one card: 'Travel Request Form'. Each card includes a title, a brief description, and a 'View Details' button at the bottom.

| Category | Count |
|--------------------------------|----------|
| Human Resources | 5 |
| Business Operations | 7 |
| Facilities | 2 |
| Faculty Development | 1 |
| OIT Security | 4 |
| OIT Services | 14 |
| Sponsored Research and Prog... | 1 |

| Service Title | Description |
|--|--|
| Entertainment Preapproval Form | |
| Fund Transfer Requests / Fund Swap Requests | |
| Generic Request for SOM Business Operations | Please use this form for general UCR SOM Business Operations request. |
| Procurement Commodity Request | |
| Procurement Service Request | |
| Reimbursement Request | Reimbursement Request |
| Travel Request Form | This form is used for both pre-travel arrangements and post-travel reimbursements. |

- 3. Complete the form.
 - a. The requestor details will auto populate.
 - b. Select “Fund Transfer” or “Fund Swap” from the drop down list.

This form is used for Fund Transfer Requests and Fund Swap Requests

User Information

Requestor ⓘ

Deanna Youmans x ▾

Email

deanna.youmans@ucr.edu

Phone

(951) 827-7905

Department

ⓘ SOM Finance & Administration ▾

Role

Process Improvement Advisor

Today's Date

03/10/23 🗓

*Are you requesting a Funds Transfer or a Fund Swap?

– None – ▾

Notes

- c. Fill in the rest of the information as required. Note: Items with a star are required.
- d. If any request requires someone to be notified, instructions for adding names to the watchlist is detailed in the next section of this user guide.
- e. Once complete, select submit.

*What is the dollar amount of the transfer?

*Purpose of the request

*Name of FAO/ budget owner of the fund

*Name of the Principal Investigator (PI) for this fund

What is the complete FAU you are requesting the transfer FROM?

*Activity

*Fund

*Function

Cost Center

Project Code

What is the complete FAU you are requesting the transfer TO?

Fund and Function number must be the same as the FAU you are requesting from.

*Activity

*Fund

*Function

Cost Center

Project Code

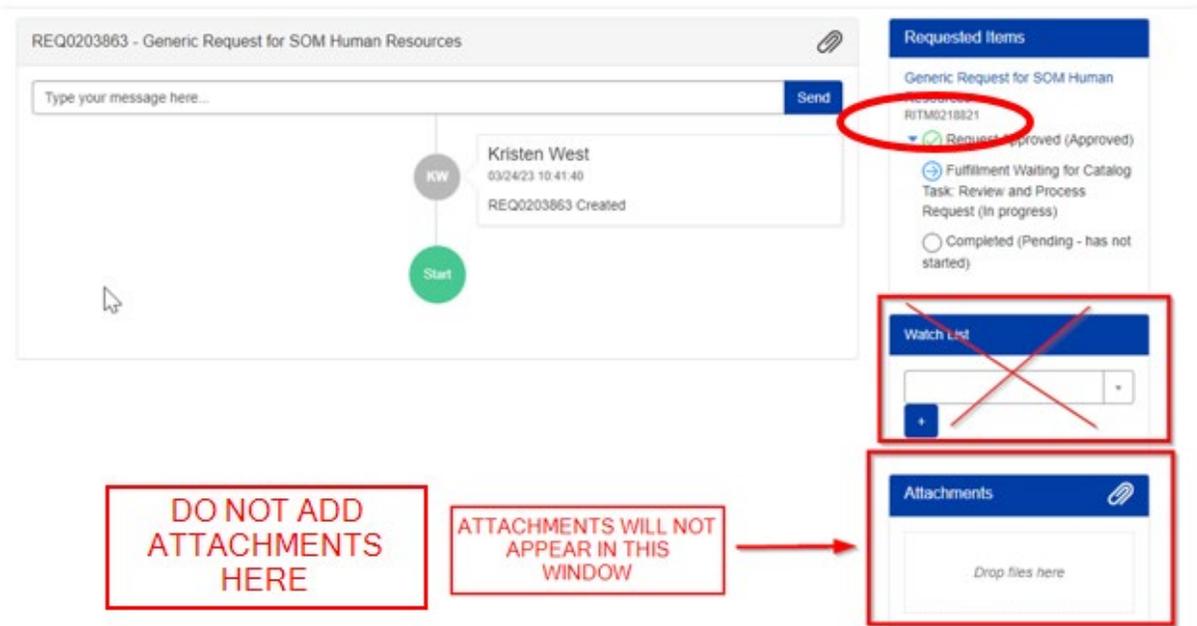
Notes



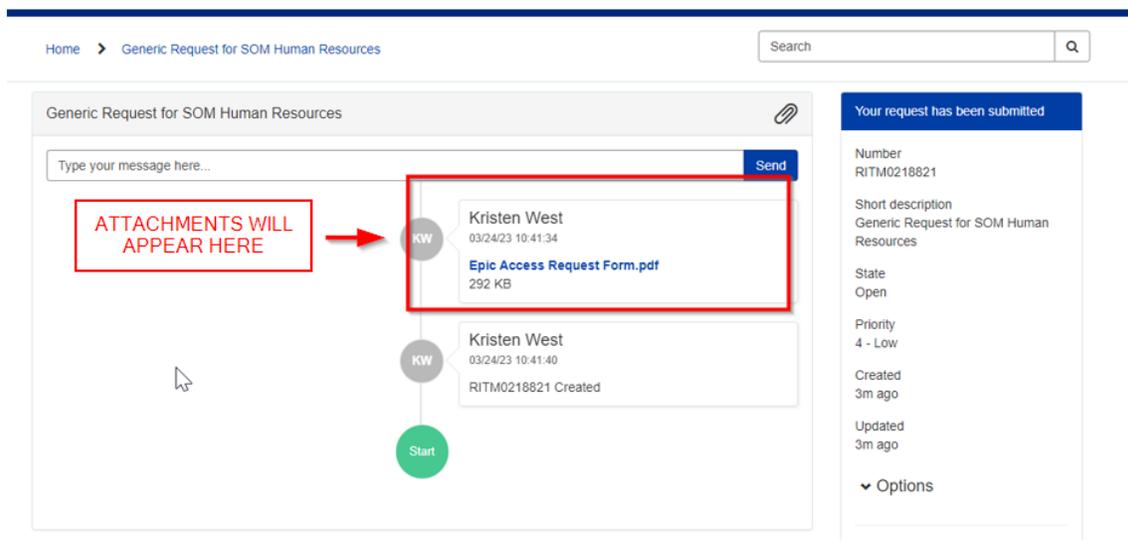
Required information **Purpose of the request** **Name of FAO/ budget owner of the fund** **Name of the Principal Investigator (PI) for this fund** **Activity** **Fund** **Function** **Activity** **Fund** **Function**

 Add attachments

- After submission the following screen will provide you with the RITM number that was created for the Business Operations Team to review. Note: Do not add someone to the watchlist from this screen. Also, your attachments may not appear from this screen. Click on the RITM number (circled in red below) and this will take you to a new screen.



- After clicking on the RITM number, the screen pictured below will appear. In this screen the attachments should appear, and additional staff may be added to the watchlist by scrolling down.

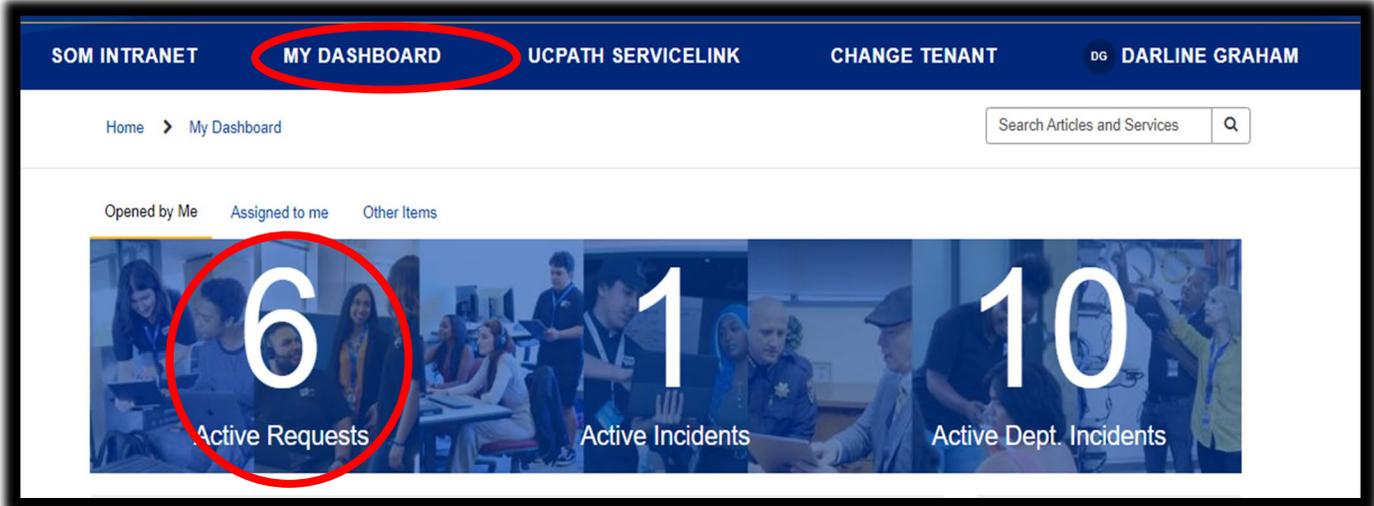


6. Add to the watchlist by typing first name, last name, and plus sign. Any attachments that were previously added will appear in this window. New attachments can be added by clicking on the paper clip on this page.

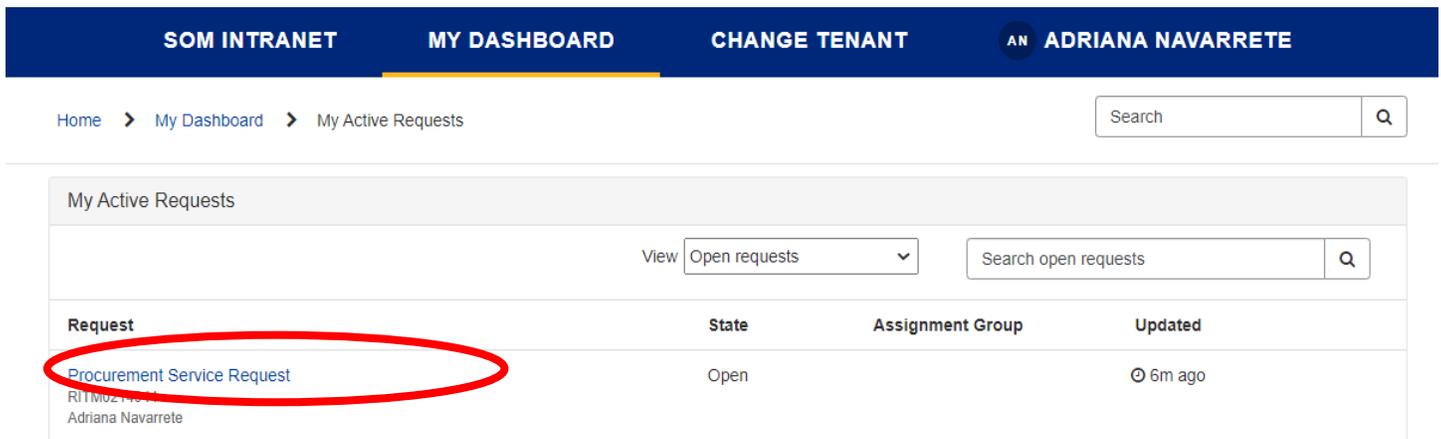
| |
|--|
| Role Business Operations and HR Project/Polic |
| Description TEST WATCHLIST |
| <i>Tickets are picked up within 4 hours (M-F 9-5)</i> |
| Watch List |
| <input type="text"/> <input type="button" value="+"/> |
| Attachments |
| Epic Access Request Form.pdf (291.7 KB) 4m ago |

Viewing a Request

1. In the main ServiceLink portal go to “My Dashboard,” select “Active Requests.”



2. All active requests will be displayed. Click on the request.



3. After clicking on the request, the status updates and comments will be displayed.

SOM INTRANET **MY DASHBOARD** **CHANGE TENANT** **AN ADRIANA NAVARRETE**

Home > My Request - RITM0214044

Number: RITM0214044 Created: 9m ago Updated: just now State: Open

Procurement Service Request

Item: Procurement Service... Requested for: AN Adriana Navarrete

Stage: Fulfillment

Activity Attachments Additional Details

Type your message here... Post

AN Status updates from BO Team just now Additional comments

AN RITM0214044 Created 9m ago

Start