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/](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.”
3. Complete the form.
   a. The requestor details will auto populate.
   b. Select “Fund Transfer” or “Fund Swap” from the drop down list.
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.
4. 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.

5. 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.
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.