HOW TO ADD/DELETE ACCOUNT NUMBERS

- Account Numbers, also referred to as PTA, are managed by protocol. Users will need to add an account for each protocol.
- You **cannot** modify information for an existing account number. They can only be added or deleted. If changes are needed, you will need to create a new account line and delete the old one. **EXCEPTION:** expiration dates can be modified by emailing the account number with new expiration date to LAR_Animal_Census@mail.colostate.edu
- Investigators or other Power Users are responsible for maintaining and updating account numbers. This action can be performed by associates listed on protocols, including the role of *Department Financial Administrator*.

- Go to INVESTIGATOR
  - Select LIST OF PROTOCOLS
  - Under column header PROTOCOL ID click on protocol to update
  - **TIP:** Hold down Ctrl + F and type protocol # in Find bar

![Protocol Details](image)

Click on tab name FUNDING DETAILS

![Funding Details](image)

Click ADD button.

A PTA Details box will appear (sometimes this box is hidden behind other screens).

Add account details. Account number **MUST** be a 7 digit CSU account number valid in KFS (no special characters or spaces allowed).

**NEW:** If you wish to use a SubAccount, you can add this to the end of the account number.

Example: **5312345MOU**

The underline represents the subaccount (no dashes or spaces allowed).