HOW TO CHANGE ACCOUNT NUMBERS

- Account Numbers, also referred to as PTA, are managed by protocol. Make sure your account has been added to the appropriate protocol number(s) before proceeding. You can check this by referring to instructions “How to Add/Delete Account Numbers”.
- 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 (DFA).

**THIS ACTION CREATES A CHANGE USING AN EFFECTIVE DATE OF THE FIRST DAY OF THE CURRENT BILLING CYCLE (21st of month). See instructions for ANIMAL TRANSFER if you wish to use a different transfer date. If you need to make adjustments to a previous billing cycle please contact your department fiscal officer to create a GEC in Kuali.**

Go to DFA, INVESTIGATOR, or ANIMAL BILLING (depends on your assigned user role)
- Select PTA MANAGEMENT
- If changing (1) cage card you don’t need to change the Criteria
  If you need to change more than one cage card select GROUP
- Select the PI Name and Protocol. If you click FIND you will receive a list of all the cage cards associated with that protocol or you can be more specific with your search a select a PTA and the list will return the cage cards ONLY associated with that account number.
- Check the box to the left of the bar code number(s) for specific cage cards or select all.
- Click CHANGE or CHANGE ALL

A pop-up window will appear with the account assigned to the protocol
Check the box for the account to transfer to
Type in percentage
Click SAVE