

OPENING A NEW SUB-ACCOUNT FOR NON-CENTRALLY FUNDED STRATEGIC PLAN INITIATIVES (GROUP A) QUICK REFERENCE

Sub-Account

Doc Nbr: 10815135 Status: INITIATED
 Initiator: Created: 08:37 AM 02/19/2019

DOCUMENT OVERVIEW
EXPAND ALL COLLAPSE ALL

OVERVIEW

* Description:

Organization Document Number:

Explanation:

EDIT SUB-ACCOUNT CODE
NEW

Edit Sub-Account Code

Chart Code: This should always be "UA"

Account Number: The account number to which the new sub-account will be associated.

Sub-Account Number: Number the sub-account using the following convention: SI### where ### corresponds to the Wave card number.

Sub-Account Name: The name of the corresponding template. For example, 1.1A-Enrollment (limited to 40 characters).

Active Indicator: Always check this box.

Sub-Account Type Code: This will always be "EX"

* Chart Code:

* Account Number:

* Sub-Account Number:

* Sub-Account Name:

Active Indicator:

Sub-Account Type Code: EX

Note: Not all sections of the document are shown. Unless applicable, leave the remaining sections blank.

Submit Save Close Cancel

- Submit:** Click to submit the document. After submitted, the status of the document will change from "Initiated" to "Enroute." It will be routed for approval or acknowledgement.
- Save:** Use when a document is initiated but not yet complete. Saving allows it to be opened at a later date for completion.
Note: All saved documents are canceled after 90 days of no activity.
- Close:** This will close the document without submitting it. It will not save any new changes made to the document.
- Cancel:** This will cancel the document. A message will prompt you to confirm you want to cancel the document. Canceled documents are void, cannot be modified in any way, and do not route for approval.