Quick Start Guide

Transfer Between Bank Accounts Form
Complete this form to transfer funds between State and WVURC bank accounts.

1. Access Mountaineer Marketplace:
   - Log in at myaccess.wvu.edu
   - Click the MyTools tab
   - Click the Mountaineer Marketplace button

2. In the list of PCPS Automated Forms on the Mountaineer Marketplace Home page, click **Transfer Between Bank Accounts** to open the form.

3. Choose WVU Research Corp or West Virginia University.

4. After making a choice, the Fulfillment Address populates.
5. Provide payment information.
   - **Product Description**: a description of the transfer request
   - **Invoice Date**: the date you are submitting the form
   - **Good Recd Date**: the date you are submitting the form
   - **Amount**: the total amount of the transfer

6. At the top of the form, view choices in the **Available Actions** region in the upper right corner. Choose **Add Item and Close Form** and click **Go**.

7. A shopping cart has been created that contains this form. You may click either:
   - **Proceed to Checkout** (Go to step 10)
   - **Assign Cart** (Go to step 8).

   **Note**: If you do not know the account number to be charged, discuss with your business office if the form should be assigned to another employee or submitted to the EBO.

8. To assign the cart to another employee, click **Assign Cart** and then choose the employee who will review the cart; click **Assign**.

9. You will see a verification that the cart was assigned.

   **End of instructions** if you assigned the cart.

   After the charged account has been entered, the shopping cart will be routed to the entity that will enter the credited account, based on your choice in step 3.
10. After you click **Proceed to Checkout**, you may either:
   - Complete the account number (go to step **11**)
   - OR
   - Let your business office enter the account number (go to step **13**).

11. To enter the account number that will be charged, click the **Accounting Codes** tab.

12. Complete the account number to be charged.

13. Click **Submit Requisition**.

14. You will see a verification that the requisition was submitted.

This form will complete the charge portion of the transfer. Submit a miscellaneous receipt to Revenue Services for the credit portion.