Internal Transfer

Complete this form when transferring funds within the same bank account or to pay another internal department for goods or services.

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 Market Home page, click Internal Transfer to open the form.

3. Choose the supplier who will be paid for the good/service provided:

4. Complete all bolded fields in the Description region. (Non-bolded fields are optional.)
   - **Product Description**: a description of the internal transfer request.
   - **Goods Recd Date**: the date you have received the goods/service. If no Goods Recd Date, enter the date you are submitting the form.
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- Does this transfer involve a POETA on either the Charge or Credit?
  Select ‘Yes’ only if any of the accounts you are requesting the transfer to or from is a grant. You may update this later, if necessary.

5. Enter the full General Ledger number or the POETA number of the account that will be credited.

Note: If you are using this form to pay another internal department that is listed as an option in the Supplier field, enter just the credit amount. After step 6, you will be able to enter the account number to be charged. After you submit the requisition, the form will be routed to that department based on the supplier you chose in step 3. That department will complete the account number to be credited. If the department you are trying to pay is not listed in the Supplier list you can enter the credit funding string (if they provided that information) or your EBO can forward the requisition to the contact person in that credit department.

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. Click Go.

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

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.