



Financial Manager Change Request

The Financial Manager Change Request allows a department to submit requests for Fund Manager or Orgn Manager changes. Once submitted, the request routes to the Fund Managers for each fund in the request, notifying them that the request is in their queue for approval. After Fund Manager approval, the request will route to Finance Systems Management for final review and processing.

Requests can be tracked through the Search feature where the status and details of the request can be viewed.

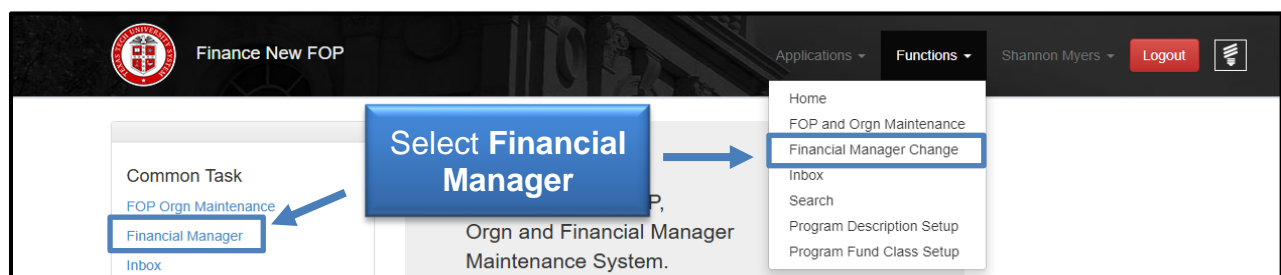
The system and related training documentation can be accessed from:

- [Financial Manager Change Request](#)
- [WebRaider portal](#) > Business Affairs tab > Links to Financial Systems > Financial Manager Change Request

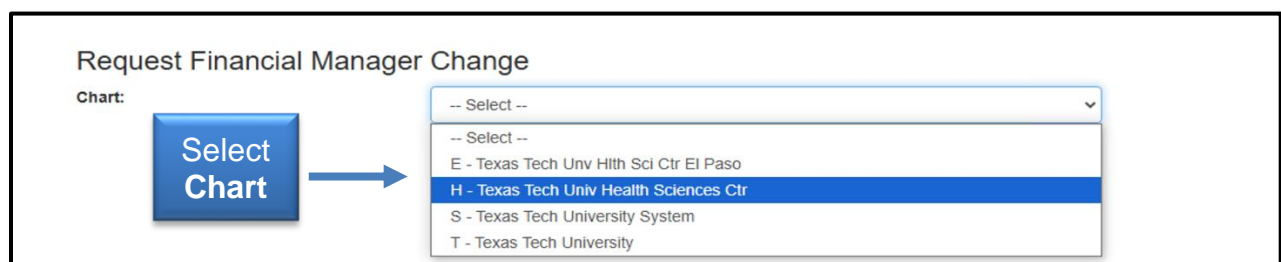
Note: The FOP Orgn Maintenance section of the Finance New FOP system is not utilized by TTUHSC. The Program Description Setup and Program Fund Class Setup sections, found under the Functions tab, are not used by functional users.

Submit a Fund or Orgn Manager Change Request

Upon accessing the Finance New FOP, select **Financial Manager** from the Menu bar on the left side of the page or the drop-down list under Functions.



Select the appropriate **Chart of Accounts** from the drop-down list.



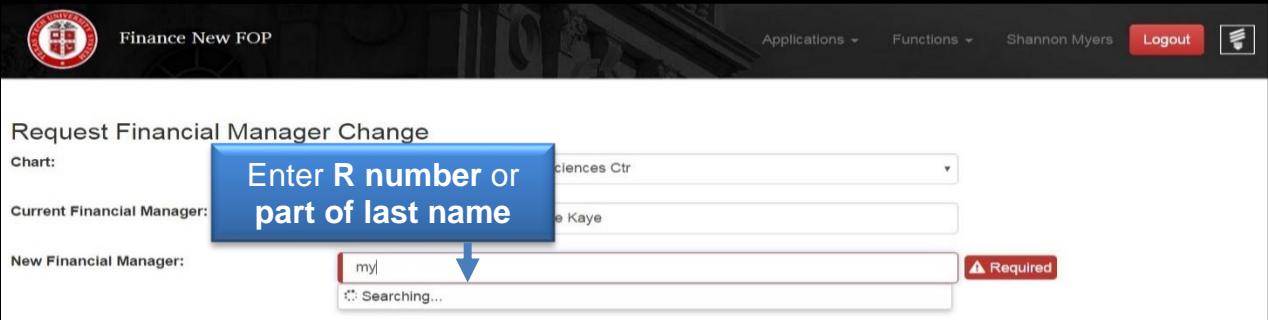
Financial Manager Change Request Training

In the Current Financial Manager box, enter the R number or part of the name for the Current Financial Manager. Search results will display a list of names or name from which to select. Select the proper name of the Current Financial Manager.



The screenshot shows the 'Request Financial Manager Change' form. The 'Current Financial Manager' field is highlighted with a blue callout box that says 'Enter R number or part of last name'. The search results dropdown is visible, showing 'wa|' and 'Searching...'. The form also includes a 'Chart' dropdown set to 'H - Text' and a 'Logout' button in the top right corner.

In the New Financial Manager box, enter the R number or part of the last name for the New Financial Manager. Search results will display a list of names or name from which to select. Select the proper name of the New Financial Manager.



The screenshot shows the 'Request Financial Manager Change' form. The 'New Financial Manager' field is highlighted with a blue callout box that says 'Enter R number or part of last name'. The search results dropdown is visible, showing 'my|' and 'Searching...'. The form also includes a 'Chart' dropdown set to 'H - Text', a 'Current Financial Manager' field with 'Kaye' entered, and a 'Required' warning icon next to the 'New Financial Manager' field.

A list of Funds and Organizations currently managed by the Current Financial Manager will be displayed. Select the proper Fund(s) or Organization(s) to be changed to the New Financial Manager. If all Funds or all Organizations currently managed by the person should be changed, click the **Select All** link at the top of each list.

Provide an explanation in the Explanation for the Change Request text box. After selections are made, either **Save** to complete later, **Save and Submit** to send through approvals or **Cancel** to go back to the beginning of the change request.

Email notifications from the Finance New FOP system are sent to Fund Managers for each fund included in the request notifying them that the request is in their queue for approval.

After approval, the request routes to Finance Systems Management (FSM) for final review and processing. If the request has an Orgn change on it, it will route to the Budget Office.

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Note: Any new fund manager who has not completed the online Fund Manager training will need to do so before the request is approved. A link to the training will be emailed by FSM.

The screenshot shows the 'Request Financial Manager Change' form in the Finance New FOP system. The form includes fields for Chart, Current Financial Manager, and New Financial Manager. Below these are two tables: 'Funds Currently Managed by Carole Wardroup' and 'Organizations Currently Managed by Carole Wardroup'. Both tables have a 'Select All' checkbox and a 'Select Fund(s)' or 'Select Orgn(s)' callout. The 'Explanation for Change Request' field has an 'Enter Explanation' callout. At the bottom, there are 'Save', 'Save and Submit', and 'Cancel' buttons, with a 'Click Save and Submit' callout pointing to the 'Save and Submit' button.

Request Financial Manager Change

Chart:

Current Financial Manager:

New Financial Manager:

Funds Currently Managed by Carole Wardroup

Select All	Fund Code	Fund Title
<input type="checkbox"/>	181395	Finance Systems Management
<input checked="" type="checkbox"/>	181395	Finance Systems Management
<input type="checkbox"/>	181395	IC Finance Systems Mgmt
<input type="checkbox"/>	221045	Finance Systems Management

Organizations Currently Managed by Carole Wardroup

Select All	Orgn Code	Orgn Title
<input type="checkbox"/>	20119	Finance Systems Mgmt Lbk
<input type="checkbox"/>	20119	Property Management Lbk
<input type="checkbox"/>	201193	Finance Systems Mgmt Lbk

Explanation for Change Request:

Buttons: Save, Save and Submit, Click Save and Submit, Cancel

After submitting the request, a Status Message will go to your Finance New FOP Inbox. The message displays the Request ID, Chart, related information, Status, and a link to view the request details.

The possible statuses are:

- N – Not been submitted
- P – Pending Approval
- R – Rejected
- A – Approved

Financial Manager Change Request Training

The approved requests will show in your Inbox for 7 days. To view the Details of the request, click the **Details** link.

Inbox

Your Financial Manager Change Request

Status Codes - N has not been submitted - P is pending approvals - R is rejected - A is approved.
Approved requests will show in your Inbox for 7 days.

Request ID	Chart	Requester	Request Date	Current Manager	New Manager	Status
13781	H	Shannon Myers	Jan 17 2025	Carole Kaye Wardroup	Click Details	Delete

The Details section includes approval routing and eligible approvers. Click **Close** to exit Details.

Inbox

Your Financial Manager Change Request

Status Codes - N has not been submitted - P is pending approvals - R is rejected - A is approved.
Approved requests will show in your Inbox for 7 days.

Request ID	Chart
13781	H

Details for Request : 13781

Financial Manager Change Request
Requester - Shannon Myers
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R0090] Wardroup, Carole Kaye

New Financial Manager: [R1140] Myers, Shannon

Organizations Currently Managed by Carole Wardroup

Orgn Code	Orgn Title	Status
201193	Finance Systems Mgmt Lbk	SELECTED

Effective Date: Jan 21 2025

Explanation for Change Request:
Explanation goes here

Approval Route: Initiated On: Jan 21, 2025

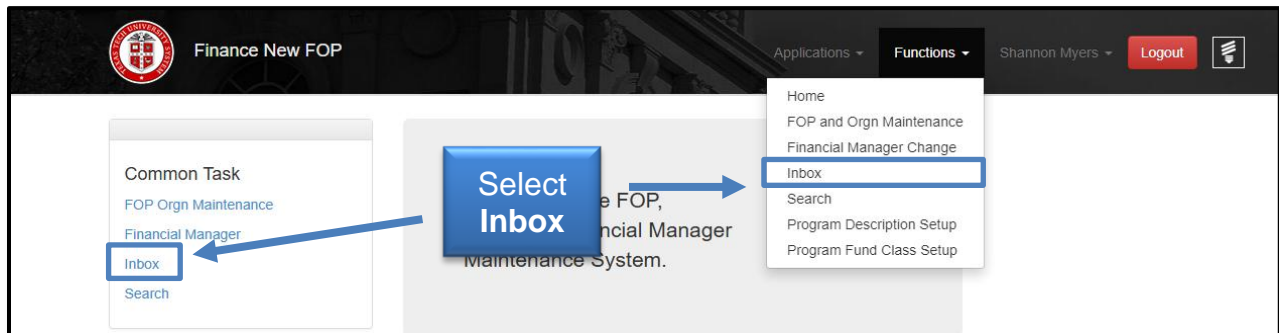
From Orgn Mgr To Orgn Mgr TTUHSC Budget Office

Status	Started	Activity On	Approval Group	Approvers
Pending	1/21/25 7:53 AM		From Orgn Mgr	Carole Wardroup
			To Orgn Mgr	Shannon Myers
			TTUHSC Budget Office	Leticia Almaguer, Kerry Romme, Gina Stockman

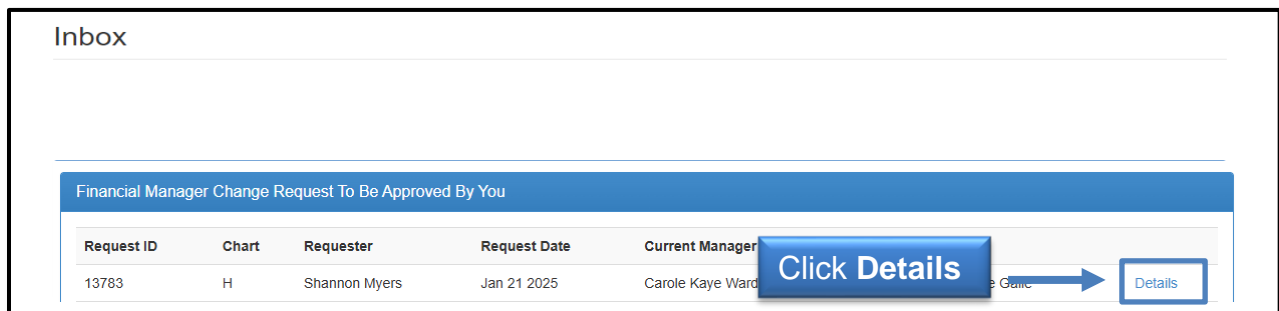
[Attachments](#) [Comments](#) [Close](#)

Approve a Fund or Orgn Manager Change Request

Upon accessing the Finance New FOP application, click the **Inbox** to review Financial Manager Change Requests for approval.



Click the **Details** link of the request that needs to be approved.



Review the details including:

- From: Fund Manager Name
- To: Fund Manager Name
- Explanation for the fund listed in the change request

If all information is correct, click the **Approve** button. If the information is not correct or the request is not valid, click the red **Reject** button.

Financial Manager Change Request Training

Details for Request : 13783
Financial Manager Change Request
Requester - Shannon Myers
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00474558] Galle, Alexandra Nicole

Effective Date: Jan 21 2025

Review Details

Explanation for Change Request:
Explanation goes here

Approval Route: Initiated On: Jan 21, 2025

Status	Started	Activity On	Approval Group	Approvers
Pending	1/21/25 11:15 AM		From Orgn Mgr	Carole Wardroup
			To Orgn Mgr	Alexandra Galle
			TTUHSC Budget Office	Leticia Almaguer, Kerry Romine, Gina Stockman

Approver Notes:

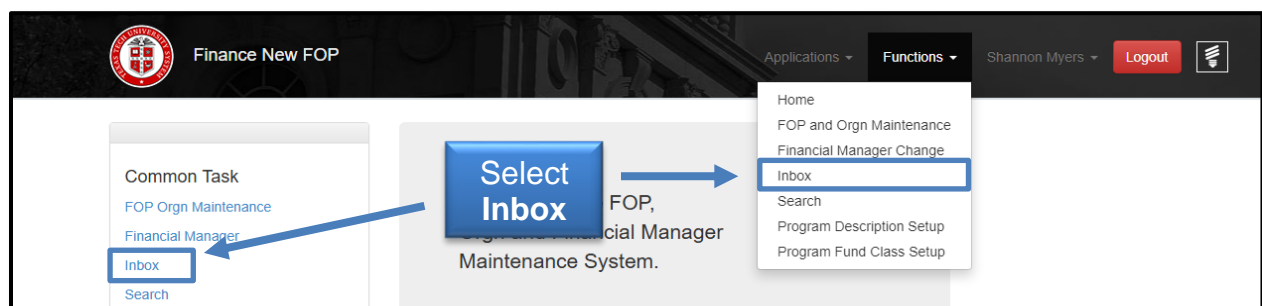
(Note: Rejection requires notes.)

Click Approve or Reject

Attachments (0) Comments (0) Save Change Approve Reject Close

Manage Your Inbox

Access your Inbox from either the menu list on the left side of the page or from the Functions drop-down list at the top of the page.



Financial Manager Change Request Training

A list of your Financial Manager Change Requests is displayed with the Request ID, Chart, related information, Status, and a link to view the request Details.

The possible statuses are:

- N – Not been submitted
- P – Pending Approval
- R – Rejected
- A - Approved.

The approved requests will show in your Inbox for 7 days. To view the details of the change request, click on the **Details** link.

Inbox

Your Financial Manager Change Request

Status Codes - N has not been submitted - P is pending approvals - R is rejected - A is approved.
Approved requests will show in your Inbox for 7 days.

Request ID	Chart	Requester	Request Date	Current Manager	Status
13783	H	Shannon Myers	Jan 21 2025	Carole Kaye Wardroup	Details

Click **Close** to exit the details.

Details for Request : 13783

Financial Manager Change Request

Requester - Shannon Myers
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00474558] Galle, Alexandra Nicole

Effective Date: Jan 21 2025

Explanation for Change Request:
Explanation goes here

Approval Route: From Orgn Mgr -> To Orgn Mgr -> TTUHSC Budget Office
Initiated On: Jan 21, 2025

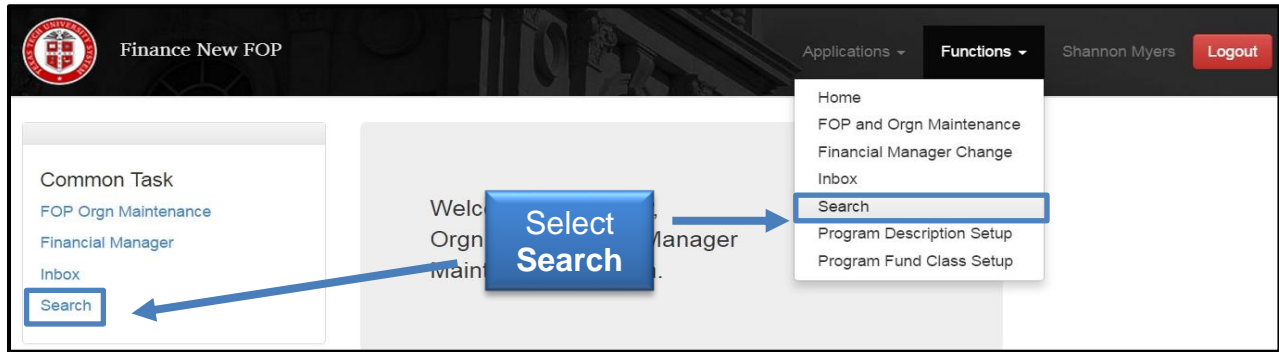
Status	Started	Activity On	Approval Group	Approvers
Pending	1/21/25 11:15 AM	From Orgn Mgr	From Orgn Mgr	Carole Wardroup
		To Orgn Mgr	To Orgn Mgr	Alexandra Galle
		TTUHSC Budget Office	TTUHSC Budget Office	Leticia Almaguer Stockman

Click Close

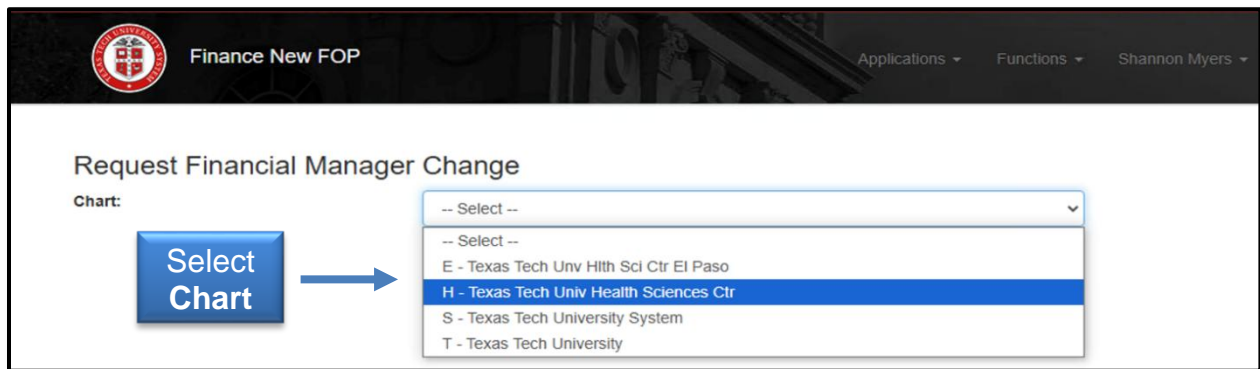
Financial Manager Change Request Training

Search

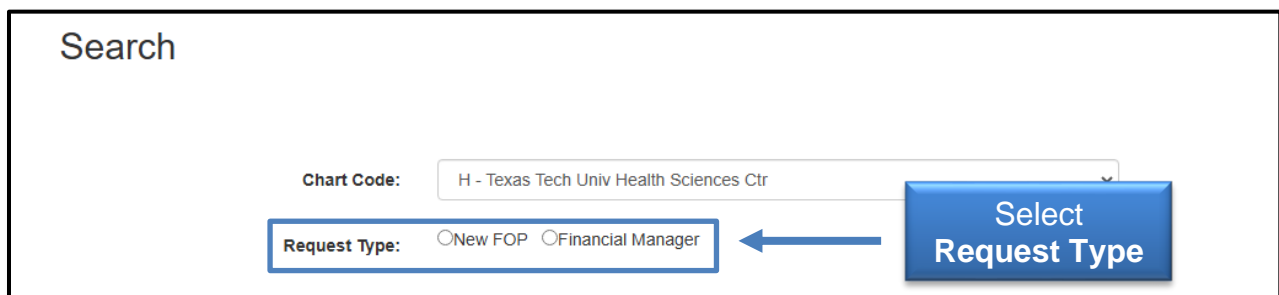
To use the Search feature, click the **Search** link in the menu list on the left side of the page or from the drop-down list under Functions at the top of the page.



Select the appropriate **Chart of Accounts** from the drop-down list in the Chart Code box.



Select the type of request to search, either **New FOP** or **Financial Manager**.



Select a **Status type**, such as approved, error, new, rejected, or submitted. If you want to include all status types, then select All.

Financial Manager Change Request Training

Search

Chart Code:

Request Type: ☐ New FOP ☒ Financial Manager

Status: ☐ Approved ☐ Error ☐ New ☐ Rejected ☐ Submitted ☐ All

Select Status

A list of all requests is displayed based on the selections from the prior screens. The requests are sorted by Request ID.

You can filter any column with a filter field at the top of each column. You can search for a single date or a range of dates by entering both the begin date and the end date. Only those requests that meet the entered criteria will be displayed.

To view the details of a change request, click the **Details** link.

Search

Chart Code:

Request Type: ☐ New FOP ☒ Financial Manager

Status: ☐ Approved ☐ Error ☐ New ☐ Rejected ☐ Submitted ☐ All

Search by Columns

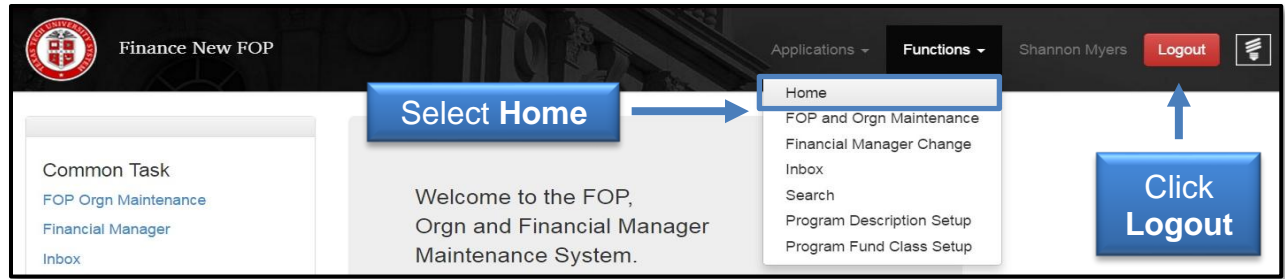
Clear Filters

Request ID	Requester	Request Date	Current Manager	New Manager	Status
13783	Shannon Myers	Jan 21 2025	Carole Kaye Wardroup	Alexandra Nicole Galle	P
13782	Shannon Myers	Jan 21 2025	Carole Kaye Wardroup	Alexandra Nicole Galle	P
13781	Shannon Myers	Jan 17 2025	Carole Kaye Wardroup	Shannon Myers	P

Click Details

To return to the main page, click the **Home** link from the drop-down list under Functions at the top of the page. To exit the system, click the red **Logout** button at the top right of the page.

Financial Manager Change Request Training



If you have additional questions, please contact Finance Systems Management at fsm@ttuhsc.edu.