

If you have a member from your department/faculty that has been transferred or has been terminated, please remember to update/verify the following **finance roles**:

Note - This is in addition to initiating the usual TNT process.

	Finance Role	Action to take / Area to Contact within Financial Services
<input type="checkbox"/>	ORG Manager	Notify FIS Security by email fissecurity.acct@mcgill.ca requesting a change in ORG Manager. Be sure to include the following information: <ul style="list-style-type: none"> ✓ Full name of the individuals to remove and add ✓ McGill ID of the individuals to remove and add ✓ Assigned Organization Code(s)
<input type="checkbox"/>	Key Financial Contact (KFC)	Notify FIS Security by email fissecurity.acct@mcgill.ca requesting a change in KFC. Be sure to include the following information: <ul style="list-style-type: none"> ✓ Full name of the individuals to remove and add ✓ McGill ID of the individuals to remove and add ✓ Assigned Organization Code(s)
<input type="checkbox"/>	uPrint Administrator	Notify FIS Security by email fissecurity.acct@mcgill.ca . Be sure to include the following information: <ul style="list-style-type: none"> ✓ Full name of the uPrint Administrator to remove ✓ McGill ID of the uPrint Administrator to remove ✓ Assigned Organization Code(s)
<input type="checkbox"/>	FST Manager or FST Support Staff	See the "For FFOs" page on the Financial Services website for checklists and forms to use - http://www.mcgill.ca/financialservices/ffo
<input type="checkbox"/>	Delegate for the approval of purchase requisitions (MMP) and PCard transactions	Each Fund Financial Manger must revoke the delegation record(s) in Minerva. For instructions, refer to the Knowledge Base article - http://kb.mcgill.ca/fskb/easylink/article.html?id=3861 . To view all funds for which an individual is a delegate, run the <i>List of Fund Delegates by FFM</i> web or crystal report found on the FST Reports page - http://www.mcgill.ca/financialservices/reporting/fst-reports .
<input type="checkbox"/>	Reviewer for Advances and Expense Reports	Notify the Travel Desk by email traveldeskhelpt@mcgill.ca . Be sure to include the following information: <ul style="list-style-type: none"> ✓ Full name of the Reviewer to remove ✓ McGill ID of the Reviewer to remove ✓ Unit/Dept

CHECKLIST FOR TRANSFERS & TERMINATIONS

	Finance Role	Action to take / Area to Contact within Financial Services
<input type="checkbox"/>	Departmental PCard Reconciler	Notify the Central PCard Administration Team by email pcardadministration@mcgill.ca and cc the Card Holder. Be sure to include the following information: <ul style="list-style-type: none">✓ Full name of the Departmental PCard Reconciler to remove✓ McGill ID of the Departmental PCard Reconciler to remove✓ Full name of the PCard Holder✓ McGill ID of the PCard Holder
<input type="checkbox"/>	Assigned uPrint FOAPAL	Contact the KFC or uPrint Administrator to remove assigned funds to the individual. For instructions, refer to the Knowledge Base article - http://kb.mcgill.ca/fskb/easylink/article.html?id=4108 .