

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
	ORG Manager	<p>Notify FIS Security by email fissecurity.acct@mcgill.ca requesting a change in ORG Manager. Be sure to include the following information:</p> <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)
	Key Financial Contact (KFC)	<p>Notify FIS Security by email fissecurity.acct@mcgill.ca requesting a change in KFC. Be sure to include the following information:</p> <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)
	uPrint Administrator	<p>Notify FIS Security by email fissecurity.acct@mcgill.ca. Be sure to include the following information:</p> <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)
	FST Manager or FST Support Staff	<p>See the “Faculty Financial Officers (FFOs)” page on the Financial Services website for checklists and forms to use - https://www.mcgill.ca/financialservices/gfm/financeroles/ffo</p>
	Delegate for the approval of purchase requisitions (MMP) and PCard transactions	<p>Each Fund Financial Manager must revoke the delegation record(s) in Minerva. For instructions, refer to HOW TO Delegate Purchase Requisitions, Change Orders and PCard Transactions document on the Financial Services website - https://www.mcgill.ca/financialservices/gfm/fis-system/minerva.</p> <p>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 - https://www.mcgill.ca/financialservices/reporting/fst-reports.</p>
	Reviewer for Advances and Expense Reports	<p>Notify the Travel Desk by submitting a ticket via the FIS Service Desk Portal. Be sure to include the following information:</p> <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
	Departmental PCard Reconciler	<p>Notify the Central PCard Administration Team by email pcardadministration@mcgill.ca and cc the Card Holder. Be sure to include the following information:</p> <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
	Assigned uPrint FOAPAL	<p>Contact the KFC or uPrint Administrator to remove assigned funds to the individual. For instructions, refer to How To Assign FOAPALs to Users document on the Financial Services website - https://www.mcgill.ca/financialservices/gfm/fis-system/minerva.</p>