



## Introducing the New Transfer Journey

Several challenges arise when an employee transfers from one department to another. These can range from Ignite access changes to more complex matters such as pending expense reports or unreconciled P-card charges.

To alleviate issues like these, the new Transfer Journey will be assigned as soon as the transfer is confirmed. It includes tasks for the employee, their current manager, and the future manager. Below are a few examples of the tasks you will find in the new Transfer journey; this is not a complete list of all tasks.

### Employee tasks

- Return Purchasing and/or Travel card, along with any department-owned equipment.
- Process all outstanding expense items
  - Reconcile Purchasing Card and/or Travel Card expenses.
  - Process any necessary expense reports for cash or personally paid items.
- Remove any expense delegates and ensure the employee has been removed as a delegate to others, if applicable.
- Review and approve all outstanding tasks in the Ignite worklist.

### Current Manager tasks

- Ensure all responsibilities are moved to a different employee.
- Verify all outstanding expense items have been resolved.
- Coordinate with the Business Officer to request removal of Ignite access not applicable to their new position.

### New Manager tasks

- Introduce the new employee to the department.
- Coordinate with the Business Officer to add Ignite access needed.

The intention is to ensure all tasks assigned to the employee and current manager are addressed prior to the transfer; and the New Manager tasks are completed as soon as possible after the transfer to allow the employee a smooth transfer.