TCU has created self-service options to allow departments to manage when employees leave TCU or transfer to new positions. *The below items are required where applicable.*

SYSTEM ACCESS

HR Manager Default Approver Replacement

The HR Manager or "reports-to" manager default is the individual to whom an employee reports directly.

☐ Identify new or interim HR Manager or "reports-to" manager.
- Departments are responsible for ensuring the accuracy of an employee's HR manager or "reports-to" manager. If this information is incorrect and HR is not notified, approval workflows, such as those in Concur, will continue to route to the wrong individual.

☐ To update an employee's HR Manager an ePAF must be submitted. Department managers, and their designated delegates, can create ePAFs for their department. Please note that some delegates may not have access to submit ePAFs for all employee types. If you do not have ePAF access or have questions, contact the HR Tech team at HRtech@tcu.edu. Once submitted, the update will typically be reflected in systems such as Concur within 24 hours.

*Note: Above steps must be completed for new approvers as well as when existing employees transfer to a new position within TCU.

COA Cost Object Approver Replacement

The Cost Object Approver is assigned by department. Only one Cost Object Approver can be assigned to a department.

☐ Identify the employee who will replace the departing employee in the COA (Cost Object Approver) role.
- If under academic units, please email Meredith Brunson at ProvostOps@Tcu.edu to confirm replacement.
- If there is not a permanent replacement for the COA, identify a delegate who will perform the COA approver role until a permanent replacement is hired. See TCU Getting Started for how to setup a delegate. Link
  - If the COA approver departs without creating a delegate, contact Concur@tcu.edu for assistance.

☐ For permanent COA approver changes, complete the Financial Approver Change Request form in Jaggaer.

*Note: Above steps must be completed for new approvers as well as when existing employees transfer to a new position within TCU.

Transferring to a new position within TCU

Transferring of TCU Cards

University Purchasing and Travel Credit Cards are issued to the employee, in the employee's name. They are not the property of the department. Employees transferring within TCU will retain their University Card when moving to their new role.

☐ Determine if either of the following applies to the transferring employee:
- The employee no longer needs to have a Travel or PCard in their new role.
- The employee had a PCard in their old position and is a COA (Cost Object Approver) in their new role. *PCards are not allowed for COAs and the card must be canceled.*

☐ Submit a request to cancel the transferring employee's card if either of the two items listed above apply. See Cancel, Suspend, or Reinstate an Existing Card. Link

It is the responsibility of the transferring employee to perform the following, as applicable:

☐ Verify all card information is up to date, including name changes and expiration date. See Update an Existing Travel or Procurement Card. Link

☐ Submit a Department Transfer Change request in Concur if the employee is retaining their existing PCard in their new role. Transferring employees can complete this by creating a TCU Card Request and Updates request in Concur and selecting "08. Departmental Transfer Change" when adding an expense type. Provide the employee's name, old department and new department information into the Additional Details box at the bottom

☐ Submit a new card request if the employee did not have a card in their previous role and their new role requires one. See How to Request a New First-Time Card. Link

Default Accounting Codes

The Fund and Department codes in your user profile are based on the HR job code assigned to you by default. This default may not be accurate after a position change within TCU. When moving to a new role, make sure to review and update these codes in your profile.

☐ Review Updating Default Accounting Codes in your Concur Profile for assistance updating default codes. Link

Cardholder Responsibilities

TCU Cardholder Requirements

It is the responsibility of the departing employee and/or their approver(s) to perform the following:

☐ Cardholders MUST submit a Request to cancel their card in Concur. See Cancel, Suspend, or Reinstate an Existing Card. Link
   - If cardholder has already left TCU, the cardholders' approver can request cancellation by contacting, Concur@tcu.edu.
☐ Cardholders must shred TCU cards prior to departing.

*Note: The card Administrator reviews the weekly termination report from HR and may email cardholders who appear on the report to enquire if their Pcard or Travel Card can be closed. If the cardholder has a future-dated termination date, the employee's Pcard account will be canceled 30 days prior to their termination date. This is to ensure no unactioned Pcard transactions are left to reconcile after departure.

☐ Ensure Available Expenses in Concur are actioned. This includes employee paid expenses requiring reimbursement. If necessary, contact Concur@tcu.edu to verify if there are any available expenses currently in process that require completion or reassignment to a delegate prior to offboarding.
☐ Verify that all expense or travel request approvals and any remaining expense reports are resolved or reassigned prior to the employee's departure date.
   - If there are any open Travel Requests in the employee's profile where travel did not take place, please be sure they close the request.
   - Pcard reports can only be submitted on the 3rd business day of the new month. Please check for any outstanding transactions, assign to a delegate and ensure temporary submission access has been granted to another departmental employee who is not a COA (cost object approver).
   - Travel Card transactions- if any transactions have not been assigned to an expense report, please be sure they are assigned to a report and submitted.
   - Be sure that any refunded transactions are actioned by including in an expense report and submitting.
   - If the employee has already departed, please contact Concur@tcu.edu for one of our support team members to assist you with transactions and reports.

*Note: Once an employee is terminated in HR's system, their Concur access will be automatically revoked within 24 hours of system termination.