How to Transfer Responsibilities

If a user with elevated permissions leaves your organization, it may be necessary to deactivate the account and transfer their responsibilities to another user.

By transferring responsibilities, the new user's name will appear in upcoming Approval Workflows and policy ownership will also be transferred.

To begin, navigate to the Admin tab. Locate and click Users under the Site Data column. Use the search bar or manually locate the user in question, then click Deactivate.

This page will ask for confirmation and notify you if there are responsibilities that require transferring. Click the Deactivate User button.

Enter the name of the user who will take on the responsibilities, then click the Transfer Responsibilities button.