



Internal Promotion & Transfer Process Checklist 2026

Pre-Assessment & Eligibility Verification

Steps to confirm the candidate meets all internal requirements, tenure minimums, and performance benchmarks for the new role.

Employee Eligibility Status

- ☐ Eligible
- ☐ Ineligible
- ☐ Pending Review

Minimum Tenure Date Verification

Enter date...

Prerequisite Requirements Met

- ☐ Completed Mandatory Training
- ☐ Positive Recent Performance Review
- ☐ No Active Disciplinary Actions
- ☐ Required Certification Valid

Latest Performance Review Document

 Upload File

Internal Requisition ID

Write something...

Internal Application & Interview Stage

Procedures for managing the internal job posting, candidate interviewing, and formal evaluation against the job description.

Internal Job Posting Date

Enter date...

Candidate Name

Write something...

Interview Status

- ☐ Pending Review
- ☐ Interview Scheduled
- ☐ Interview Completed
- ☐ Passed/Selected
- ☐ Not Selected

Interview Panel Members

- ☐ Hiring Manager
- ☐ HR Representative
- ☐ Peer Interviewer
- ☐ Department Head

Interview Evaluation Notes

Write something...

Completed Interview Scorecard

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Selection & Formal Approval

The workflow for notifying department heads, securing budget authorization, and finalizing the official promotion/transfer offer.

Approval Status

- ☐ Pending Approval
- ☐ Approved
- ☐ Rejected
- ☐ Deferred

Approval Date

Enter date...

Approving Manager Name

Write something...

Signed Approval Documentation

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Justification for Promotion/Transfer

Write something...

Department Head Authorization



Compensation & Benefits Adjustment

Tasks related to updating salary grades, adjusting benefits eligibility, and updating payroll records for the new position.

New Base Salary Amount

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Pay Frequency Type

- ☐ Monthly
- ☐ Bi-Weekly
- ☐ Weekly

Effective Date of Salary Change

Enter date...

Benefits Package Updates

- ☐ Health Insurance Adjustment
- ☐ Retirement Plan/401k Update
- ☐ Stock Options/Equity Grant
- ☐ Bonus Structure Change
- ☐ Allowances (Car/Housing/Mobile)

Approved Compensation Change Authorization

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HR Manager Approval Signature

Internal Communication & Stakeholder Notification

A guide for informing the current manager, the receiving manager, and the broader team about the organizational change.

Notification Date

Enter date...

Stakeholders to Notify

- ☐ Current Line Manager
- ☐ Receiving Line Manager
- ☐ Human Resources Business Partner (HRBP)
- ☐ Direct Reports/Team Members
- ☐ Payroll & Compensation Department

Announcement Draft

Write something...

Communication Channel

- ☐ Email
- ☐ Slack/Microsoft Teams
- ☐ Company Intranet
- ☐ In-person Meeting

HR Manager Approval

System Updates & Administrative Records

Mandatory updates to the HRIS, employee digital files, organizational charts, and physical/digital access permissions.

Effective Date of Transfer/Promotion

Enter date...

Updated Department/Cost Center

- ☐ Human Resources
- ☐ Sales & Marketing
- ☐ Engineering
- ☐ Operations
- ☐ Finance
- ☐ Legal

Systems Requiring Access Update

- ☐ HRIS/Workday/BambooHR
- ☐ Email/Active Directory
- ☐ CRM (Salesforce/HubSpot)
- ☐ Project Management Tools (Jira/Asana)
- ☐ Internal Communication (Slack/Teams)
- ☐ Payroll/Timekeeping Software

New Job Title Verification

Write something...

Signed Internal Transfer Agreement

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HR Administrator Confirmation

Transition & Onboarding to New Role

Checklist for handover of current responsibilities, training for new duties, and the integration period into the new department.

New Role Effective Date

Enter date...

Transition Type

- ☐ Vertical Promotion
- ☐ Lateral Transfer
- ☐ Departmental Shift

Required New Training Modules

- ☐ Role-Specific Software Training
- ☐ Compliance & Safety Re-training
- ☐ Leadership Development Workshop
- ☐ Departmental SOP Review

Handover Completion Status

Write something...

New Job Responsibilities Summary

Write something...

Signed Updated Job Description

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Employee Acknowledgement

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🏁 Finish

🔧 Generate Sample Report