

STAFF TRANSITION CHECKLIST

Form Ref: HR-T2

Employee Name: _____

Effective Date: _____

Current Role: _____

New Role/Dept: _____

PHASE 1: PRE-TRANSITION & HANDOVER

Role Definition & Approval Confirm new job description and obtain budgetary sign-off from both departments.

Knowledge Transfer Plan Document current recurring tasks, pending projects, and critical file locations.

Successor Identification Assign temporary or permanent replacement for current responsibilities.

PHASE 2: ACCESS & INFRASTRUCTURE

Systems & Permissions Revoke old department server access; grant new software licenses and folder permissions.

Physical Assets Update building access codes, return/issue keys, and coordinate desk relocation.

Communication Updates Update email aliases, Slack channels, and the internal organizational chart.

PHASE 3: ONBOARDING & INTEGRATION

Team Introduction Schedule meet-and-greets with new direct reports and key stakeholders.

Goal Alignment Set 30-60-90 day objectives and schedule first performance touchpoint.

ADDITIONAL NOTES / SIGN-OFF: