

EMPLOYEE NAME: \_\_\_\_\_ BRANCH: \_\_\_\_\_

POSITION: \_\_\_\_\_ POSITION EFFECTIVE DATE: \_\_\_\_\_



## INTERNAL EMPLOYEE PROMOTION CHECKLIST

### Employee:

- Offer Acceptance Letter
- Read through Supervisor Handbook
- Sign Supervisor Handbook Acknowledgement
- Sign/Understand Job Description
- Sign/Acknowledge Supervisor Expectations
- Complete Supervisory Classes in TLC360
- Update email signature in Outlook
- Bookmark websites into favorites
- Add staff anniversaries/evaluations to Outlook calendar with pop-up reminders

### Information Technology:

- Add to Branch Supervisor ring group
- Give access to Public Employee Calendar in Outlook
- Transfer Phone Extension/Direct Line to new office (if applicable)
- Install Branch Camera program on PC

### Human Resources:

- Notify IT of promotion (HelpDesk ticket)
- Add 90-day Check-In to Outlook Calendar
- ClockEntry: update to supervisor
  - o Change from hourly to salary
  - o Add branch employees to supervisor's view

### Branch Operations Manager:

- Give Branch Supervisor Binder
- Add to FIS/Co-Op
- Add to Amazon
- Update to administrator:
  - o TLC360: Add branch/staff in security access and add to Supervisor group
  - o Forza: Update permissions & limits
  - o CardWizard
  - o Checks For Less
  - o ChexSystems
  - o PayPoint
  - o Tyfone Admin Console
- Kasasa RED Channel: email Nathan to change to Manager
- TranZact: update permissions
  - o Cash ordering
  - o Wires
- Move monthly reports to S: Drive
- Send any additional websites to bookmark
- Update Contact Sheet Extensions & Emails
- Update CCU Who's Who
- Microsoft Teams: add to Supervisor team
- Send Monthly Supervisor Meeting invite
- Add 90-day Evaluation to Outlook Calendar

### Executive Management Team:

- Give security codes/alarm access for branch

PROMOTION CHECKLIST COMPLETION			
PERSON RESPONSIBLE	NAME	INITIALS	DATE COMPLETED
Employee			
IT Department			
Branch Operations Manager	Karissa Farnham		
Human Resources Manager	Shelly Kleinkopf		
Executive Management Team			