

Employee exit task list

Use this list to plan your process for when an employee has resigned, is retiring, or their position is being made redundant

Step	Action	Suggested Timeframe	Mandatory?	Planned completion date	Date completed
1	Have your employee complete handover activities and save important files on a shared drive.	Begin as soon as it is clear the employee will be leaving the company.	No		
2	Assign any ongoing tasks to another employee.	During the handover process.	No		
3	Consider conducting an exit interview.	During the handover process.	No		
4	Calculate the employee's final pay, including holiday pay owed.	Pay the total amount on the last day of employment or on the final payday.	Yes		
5	Collect company assets, keys and security pass.	Last day of employment.	No		
6	Set up auto-forward and an out-of-office auto-reply on their emails.	End of last day of employment.	No		
7	Forward their phone calls and set up an out-of-office message on their voicemail.	End of last day of employment.	No		
8	Remove the employee from email distribution and contact lists.	End of last day of employment.	No		
9	Remove the employee's access to IT systems.	End of last day of employment.	No		

For more information, see [Business.govt.nz](https://business.govt.nz)'s Hiring and managing people section.

10	Provide a statement of employment if the employee requests it.	Immediately after a request is made.	Yes		
12	Update the employee's personnel file with their last day of work, last pay amount, and holiday pay details.	Day after the last day of employment.	Yes		
13	Archive the employee's personnel file and records (keep for seven years).	Day after the last day of employment.	Yes		

For more information, see [Business.govt.nz](https://business.govt.nz)'s Staff & HR section.