Employee exit checklist

Use this checklist to help you follow a good process when staff members leave your business

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| Things to do before your employee leaves | Yes | No | n/a |
| Have you asked your employee to: |
| * complete any reasonable tasks and handovers?
 |  |  |  |
| * save important files and emails in a shared drive?
 |  |  |  |
| Did you consider: |
| * assigning any ongoing tasks to another person?
 |  |  |  |
| * conducting an exit interview to get final feedback from the employee?
 |  |  |  |
| * organising a farewell party or morning tea?
 |  |  |  |

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| Things to do on your employee’s last day | Yes | No | n/a |
| Have you collected: |
| * the employee’s keys / security pass?
 |  |  |  |
| * company assets (computer, phone, uniform, books, etc)?
 |  |  |  |
| Have you set up: |
| * auto-forward and an out-of-office auto-reply on their emails?
 |  |  |  |
| * auto-forward and an out-of-office message on their voicemail?
 |  |  |  |
| If appropriate, have you considered providing a reference or offering to act as a referee? |  |  |  |
| Have you calculated the employee’s final pay, including holiday leave owed? This is to be paid in full on their last day of employment, or final payday. (Mandatory – you must do this.) |  |  |  |

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| --- | --- | --- | --- |
| Things to do after your employee has left | Yes | No | n/a |
| Have you removed: |
| * the employee from email distribution lists and contact lists?
 |  |  |  |
| * the employee’s access to online systems, e.g. the finance system and the shared file server?
 |  |  |  |
| Have you paid your employee’s final pay, including holiday leave owed, on or before their final payday? (Mandatory – you must do this.) |  |  |  |

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| Have you updated the employee’s personnel file with: (Mandatory – you must do this.) |
| * final day of work?
 |  |  |  |
| * last pay amount?
 |  |  |  |
| * holiday pay details
 |  |  |  |
| Have you archived their personnel file and records? Remember, you must keep their personnel file for seven years. (Mandatory – you must do this.) |  |  |  |
| Have you provided a statement of employment if your employee requested it? (Mandatory – you must do this.) |  |  |  |