

# Employee exit checklist

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

| Things to do before your employee leaves                                | Yes | No | n/a |
|---|-----|----|-----|
| <b>Have you asked your employee to:</b>                                 |     |    |     |
| • complete any reasonable tasks and handovers?                          |     |    |     |
| • save important files and emails in a shared drive?                    |     |    |     |
| <b>Did you consider:</b>  |     |    |     |
| • 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?                           |     |    |     |

| Things to do on your employee's last day  | Yes | No | n/a |
|---|-----|----|-----|
| <b>Have you collected:</b>  |     |    |     |
| • the employee's keys / security pass?  |     |    |     |
| • company assets (computer, phone, uniform, books, etc)?  |     |    |     |
| <b>Have you set up:</b>   |     |    |     |
| • auto-forward and an out-of-office auto-reply on their emails?   |     |    |     |
| • auto-forward and an out-of-office message on their voicemail?   |     |    |     |
| <b>If appropriate, have you considered providing a reference or offering to act as a referee?</b>   |     |    |     |
| <b>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.)</b> |     |    |     |

| Things to do after your employee has left  | Yes | No | n/a |
|--|-----|----|-----|
| <b>Have you removed:</b>   |     |    |     |
| • 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?   |     |    |     |
| <b>Have you paid your employee's final pay, including holiday leave owed, on or before their final payday? (Mandatory – you must do this.)</b> |     |    |     |

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

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

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