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

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| 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 |  |  |
| **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 |  |  |