**Employee / Contractor Exit Checklist**

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

**Name:**  **Position:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Step** | **Action** | **Suggested timeframe** | **Date  completed** | **Completed by** |
| **1** | Have your employee/ contractor complete handover activities and save important files on a shared drive | As soon as you know the employee will be leaving |  |  |
| **2** | Assign any ongoing tasks to another employee | During the handover process |  |  |
| **3** | Conduct an exit interview | During the handover process |  |  |
| **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. |  |  |
| **5** | Collect any assets such as keys and security pass, phone, laptop | Last day of employment |  |  |
| **6** | Set up auto-forward and an out-of-office auto-reply on their emails | End of last day of employment |  |  |
| **7** | Forward their phone calls and set up an out-of-office message on their voicemail | End of last day of employment |  |  |
| **8** | Remove the employee from email distribution and contact lists | End of last day of employment |  |  |
| **9** | Remove the employee’s access to IT systems | End of last day of employment |  |  |
| **10** | Provide a statement of employment if the employee requests it | Immediately after a request is made |  |  |
| **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 |  |  |
| **13** | Archive the employee’s personnel file and records (keep for seven years). Include a copy of this completed document | Day after the last day of employment |  |  |