**HUMAN RESOURCES**

**Exit Procedure Checklist**

 This checklist needs to be completed by any employee, who is leaving. Please liaise with relevant departments to ensure proper completion of each applicable item and get a member of each department to sign the relevant section after completion (or attach email confirmation). Once all items in the checklist are completed, you and your line manager need to sign the form and then return to the HR Manager.

**Employee Name:**

**Position:**

**Leaving Date:**

**Line Manager:**

|  |  |  |
| --- | --- | --- |
| **IT** | **Y/N** | **Comments** |
| All data cleared from mailbox  |  |  |
| All data cleared from personal drives /my documents etc |  |  |
| Any equipment returned (including laptops, USB) |  |  |
| Any details required by successor given (passwords to databases) |  |  |
| The existing employees are responsible for notifying their contacts of their change of email address, change of online subscriptions etc |
| Section to be signed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Date of completion:  |  |

|  |  |  |
| --- | --- | --- |
| **Finance**  | **Y/N** | **Comments** |
| Submitted all expense claims |  |  |
| Submitted all credit card statements and receipts, and credit card returned for cancellationSettled any balances owing on expenses / personal loans / returned any travellers cheques  |  |  |
| Removed access to any finance systems applicable |  |  |
| Remove any bank signatory authority  |  |  |
| Cancel the direct debit pension mandate & inform PHI |  |  |
| Section to be signed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Date of completion:  |  |

|  |  |  |
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| **Facilities Management / Health and Safety** | **Y/N** | **Comments** |
| Office cleared of all files and unused stationary items |  |  |
| Inventory of any H&S equipment provided at induction; desk lamp, foot – rest, back – rest. Any access to work arrangements / equipment  |  |  |
| Removal of boxes/documents from floor, especially under the desk |  |  |
| Keys returned  |  |  |
| Provided contact details for forwarding mail/messages |  |  |
| Remove from account, e.g taxi, travel agent etc |  |  |
| Section to be signed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Date of completion:  |  |

|  |  |  |
| --- | --- | --- |
| **Other (By the employees)** | **Y/N** | **Comments** |
| Send note to all staff informing them of your plans to leave  |  |  |
| Perform handover to successor, line manager or others in the team as appropriate  |  |  |
| Complete exit interview form |  |  |

|  |  |  |
| --- | --- | --- |
| **Line Manager** | **Y/N** | **Comments** |
| Confirm leaving date and any holiday pay under/over entitlement to HR |  |  |
| Ensure employee completes all exit procedure requirements  |  |  |

|  |  |
| --- | --- |
| **Line Manager Signature:****Date:** | **Employee Signature:****Date:** |