

Exit & Leaver Procedure

SOP · UK · Updated 2026-07-11 · Square brackets are placeholders to replace with your own details.

An exit and leaver procedure is the written sequence an organisation follows whenever someone leaves — acknowledging the resignation, running the notice period and handover, recovering property and revoking access, settling final pay correctly, and closing the record.

Leavers are where loose ends become liabilities: the ex-employee whose email login still works months later, the final payslip missing accrued holiday, the handover that existed only in someone's head. A standard procedure run for every leaver — friendly or otherwise — closes each of those gaps on a known date.

This template gives you a complete, ready-to-edit procedure: resignation handling, notice-period steps including handover and the exit interview, a last-day checklist, final pay and paperwork, and what to do when a departure gets complicated.

Purpose and scope

This procedure sets out how [Your company] manages every departure, whatever the reason, from notification to closed file. It applies to employees and workers at all levels. The decision or process that leads to the departure — resignation, redundancy, dismissal — is governed by its own policy; this procedure handles everything after that point.

When to use this procedure

- Resignations, including during probation.
- Retirements and the end of fixed-term contracts.
- Redundancies, after the redundancy process concludes.
- Dismissals, after the disciplinary or capability process concludes.
- [Adaptation: for dismissals without notice, run the last-day and final-pay steps immediately and skip the notice-period section.]

Roles and responsibilities

- Line manager: acknowledges the resignation, plans and oversees the handover, runs the last day.
- [HR/office manager]: owns the leaver checklist, coordinates payroll, IT, and paperwork, and conducts the exit interview.
- [IT/systems owner]: schedules and executes access revocation for the agreed date and time.
- Payroll ([role/provider]): calculates final pay, including accrued holiday, and issues the P45.

On receiving a resignation

1. Acknowledge the resignation in writing within [number] working days, confirming the last day of employment based on the contractual notice period.
2. Ask for the resignation in writing if it was given verbally — do not rely on a corridor conversation.
3. Notify [HR/office manager], payroll, and [IT/systems owner] of the leaving date the same week.
4. Open the leaver checklist in [system] and assign owners and dates for every item.
5. Agree how and when the departure is announced to the team and any customers — the leaver hears the plan before anyone else does.

During the notice period

1. Agree the handover plan in the first week of notice: what will be documented, what will be handed to whom, and by when.
2. Have the leaver write or update handover notes covering live work, key contacts, logins held (for transfer via [IT/password system], never by sharing passwords), and where everything lives.
3. Reassign live work and introduce successors to key contacts before the final week.
4. Book the exit interview with [neutral role, e.g. HR rather than the line manager] for the final week — attendance is invited, not compelled.
5. Confirm any post-employment obligations that continue after leaving — confidentiality and [any restrictions in the contract] — in the leaver letter.
6. Agree the treatment of remaining annual leave: taken during notice by agreement, or paid in the final pay if it is accrued statutory leave.

The last day

1. Collect all [Your company] property against the checklist: [keys, pass, laptop, phone, uniform, vehicle, card equipment].
2. Revoke systems access at [time] on the last day: email, [systems list], remote access, and shared account credentials that the leaver knew, which are rotated.
3. Remove the leaver from rotas, on-call lists, building access, and internal directories.
4. Confirm forwarding contact details and where the P45 and final payslip will be sent.
5. Set up mailbox and phone handling: [auto-reply and monitored forwarding per the IT acceptable use policy].
6. Sign off the leaver checklist and file it — an unchecked item is an open risk, not a formality.

Final pay and paperwork

Final pay is made on [the normal payday / date], itemised on a payslip, and includes pay to the last day, payment for accrued untaken statutory holiday, and [any contractual items: bonus, commission, pay in lieu of notice where agreed]. Deductions — for excess holiday taken, unreturned property, or training costs — are made only where the contract or a written agreement clearly permits them.

Issue the P45 promptly after the final pay run, confirm the position on pension contributions with [provider], and send the leaver letter confirming the end date and any continuing obligations.

If something goes wrong

If a leaver stops attending during notice, contact them, record events, and take advice before withholding anything — deductions still need lawful authority. If property is not returned, follow the deduction terms in the contract, or [escalation route] where there are none. If a resignation is retracted, [Your company] is not obliged to accept the retraction once the resignation is clear and communicated — [senior role] decides, quickly and in writing. Departures involving a live grievance or dispute are handled with advice from [role/adviser] before the leaver letter is sent.

Records and review

The leaver file — checklist, handover confirmation, exit interview themes, final pay records, and correspondence — is kept in [system] for [retention period, set in line with the data retention policy and current guidance]. Exit interview themes are anonymised and reported to [leadership meeting] [frequency] — the pattern in why people leave is management information you already paid for.

This procedure is reviewed [frequency, e.g. annually] and after any departure that surfaces a gap. Owner: [name/role]. Next review due: [date].

How to use this template

1. Build the property and systems checklist from a real audit of what staff actually hold — the forgotten cloud tool is the one that bites.
2. Agree the access-revocation handshake with IT now: who tells them, by when, and what "done" looks like.
3. Check final-pay mechanics with payroll, especially accrued holiday calculation and which deductions your contracts actually authorise.
4. Pick a neutral exit interviewer and a short standard question set so themes are comparable across leavers.
5. Run the checklist for the next leaver as a live test, then fix whatever the test finds.
6. Align the retention period in section nine with your data retention policy before publishing.

Official guidance

- › [GOV.UK — Holiday entitlement rights](#)
- › [GOV.UK — Employment contracts and conditions](#)

This template is provided in good faith and for general information — it is not legal advice. Adapt it to your organisation and, where your sector carries specific legal requirements, have the finished document reviewed by a qualified adviser. The live version at <https://trainedteam.com/templates/exit-leaver-procedure> is kept current; this file is a snapshot.