

Leaver Form and Offboarding Checklist

Checklist · UK · Published 2026-09-08 · Square brackets are placeholders to replace with your own details.

A leaver form is the single record an employer completes when someone leaves — the leaving date and reason, the notice arrangement, and a checklist of everything that has to happen before and after the last working day: final pay and the P45, the holiday balance, company property, system and building access, the handover, who needs telling, and pension and benefits.

Most small employers do the leaving well and the offboarding badly. The resignation is acknowledged, the leaving drinks happen, and three weeks later the ex-employee's email account is still live, their door fob still opens the building, and nobody can find the file the customer is asking about. The damage is rarely dramatic; it is a slow accumulation of orphaned accounts, missing kit and unanswered handover questions that only surfaces at audit, or when a relationship ends badly.

This template gives you one form covering the whole process: leaver details, an offboarding checklist you can print and tick with an owner and a date against each line, a short exit interview question set, and a sign-off block — plus what the payroll and data rules actually require, the access-revocation timing that trips people up, and what to keep after someone has gone.

How to use this form

Open the form the day notice is given or the leaving decision is made, not the week someone goes. It is used for every departure at [Your company] — resignation, end of a fixed term, retirement, redundancy and dismissal alike — because the practical tasks are identical whatever the reason. The exit interview section is the only part that is optional, and the only part that should be dropped where a departure is contested.

One person owns the form: [HR / the owner / the office manager]. They fill in the leaver details, assign the owners in the checklist, and chase the outstanding lines. Everybody else ticks their own rows. Left to the line manager alone, the IT and payroll rows are the ones that get missed.

Where the departure is a dismissal or a redundancy, run the underlying process through the disciplinary, capability or redundancy policy first — this form records the administration of the leaving, not the fairness of the decision behind it.

Leaver details

- Employee name: [name]. Payroll or employee number: [number]. Job title: [job title]. Department or site: [department/site].
- Line manager: [name]. Form owner: [name and role].
- Employment start date: [date]. Last working day: [date]. Effective date of termination: [date — say so if these differ, e.g. where holiday is taken at the end of notice].
- Reason for leaving: [resignation / end of fixed term / retirement / redundancy / dismissal / mutual agreement / other]. Detail: [free text].

- Date notice given or received: [date]. Notice required under contract: [period]. Notice actually given: [period].
- Notice arrangement: [worked in full / partly worked / garden leave / paid in lieu of notice] — where notice is paid in lieu, confirm the contract permits it: [yes/no].
- Resignation received in writing: [yes/no]. Acknowledged in writing on [date] by [name].
- Holiday: entitlement accrued to the leaving date [days], taken [days], balance to pay or recover [days].
- Written agreement in place to recover overtaken holiday from final pay: [yes/no/not applicable] — GOV.UK says money must not be taken from final pay unless agreed beforehand in writing.
- Rehire eligibility: [yes / no / with conditions]. Recorded by: [name].
- Reference contact: direct all requests to [name/role] under our reference request procedure — managers do not give personal references on [Your company] letterhead.
- Is a reference legally owed for this role? [no / yes — written agreement or contract clause / yes — settlement agreement / yes — FCA or PRA controlled function]. Acas lists those as the three cases in which an employer must give a reference by law.

Offboarding checklist

Assign an owner and a date to every line the day the form is opened. "Done" is ticked by the owner, not by the person chasing. The blank row at the end is for anything specific to the role — a company car, a professional membership, a client login, a set of site keys held for a contract.

Item	Owner	Due	Done	Notes
Confirm leaving date	[HR]	[Within 5 working days of notice]		
and notice arrange-				
Calculate holiday ac-	[Payroll]	[Final payroll cut-off]		
crued to leaving date				
Final pay agreed:	[Payroll]	[Final payroll cut-off]		
against holiday taken				
salary to date, holi-				
day balance, expan-	[Payroll]	[Last pay run]		
Record leaving date				
on pay written report	[Payroll]	[With final payslip]		
Issue P45 after the fi-				
nal pay decision	[HR]	[Last working day]		
Not pay decision				
provider; confirm				
benefit and cover end	[Employee]	[3 working days be-		
dated and document		fore last day]		
completed and ac-				
cepted by receiving	[Line manager]	[Last working day]		
ty returned: laptop,				
name				
phone keys for dis-	[Facilities]	[Last working day]		
tribution of keys				
uniform, PPE, keys,				
uniform, PPE, keys,				
System access re-	[IT]	[Last working day, at		
move codes, parking		end of shift]		
voiced, and shared				
permit				
credentials changed:	[IT]	[Last working day]		
Mailbox and files re-				
email, [HR system],				
assigned; out-of-of-				
fice set to [name and	[Line manager]	[Before last day]		
rights, MFA				
Added key contacts told	[HR]	[Within 1 month]		
Personnel file marked				
who takes over				
as leaver, retention				
review date set in				

[system]

Exit interview questions

Offer an exit interview to everyone who resigns; do not push it on anyone. Nothing requires it, the answers are unverified, and a single interview tells you little — but a year of them tells you where the exits cluster. Hold it in the last week, away from the leaver's manager where the manager may be part of the answer, and say up front how the answers will be used and who sees them.

- What made you start looking? Ask for the moment, not the label — "I was passed over in [month]" is usable, "career growth" is not.
- What is the new role offering that this one did not? [pay / hours / progression / travel / management / flexibility / other]
- How would you describe the day-to-day work compared with what you expected when you joined?
- Did you have what you needed to do the job — training, equipment, information, cover?
- How did you find working with your manager, and how was feedback given?
- Was your workload realistic, and how often did it spill outside your contracted hours?
- Did anything happen here that you felt unable to raise at the time? [If the answer touches bullying, harassment, discrimination or safety, stop the interview and route it through the grievance or whistleblowing policy — an exit interview is not the place to handle it.]
- What would you change first if you had our job for a week?
- Would you recommend [Your company] as a place to work, and would you consider coming back?
- Notes taken by: [name]. Date: [date]. Shared with: [named roles only]. Themes reviewed at [quarterly people review].

Sign-off

- Employee: "I confirm I have returned all [Your company] property listed above, that I hold no company data on personal devices or accounts, and that the contact details below are correct for my P45 and any final correspondence." Signature: [signature]. Date: [date].
- Forwarding address and personal email for final documents: [address], [email].
- Line manager: "I confirm the handover is complete, property has been returned, and access removal has been requested." Signature: [signature]. Date: [date].
- IT: access removal completed on [date] at [time] by [name].
- Payroll: final pay processed on [date]; P45 issued on [date] by [name].
- Form owner: all outstanding items closed or recorded below. Outstanding: [item, owner, chase date]. Signature: [signature]. Date: [date].

Access revocation: the timing most small employers get wrong

The common failure is not forgetting to remove access; it is removing it at the wrong time. Two mistakes recur. The first is cutting access the moment notice is given, which strands the handover — the person cannot export their own documentation, cannot answer the questions their successor needs answered, and spends their notice period unable to do the job you are still paying them for. Unless there is a genuine

risk (a move to a direct competitor, a dismissal for misconduct, a role with financial authority), keep access and monitor it rather than removing it.

The second, and more expensive, is removing access "when IT gets to it". An account that stays live for three weeks after someone has gone is a credential nobody is watching, still receiving customer email, still sitting inside your shared drives, and still counted on your licence bill. Set the revocation for the end of the last shift and make it one person's named task on this form.

- Do it in one pass, from a written list of every system the role touched — the ones people miss are the small ones: the courier account, the supplier portal, the social media scheduler, the booking system, the shared inbox.
- Change shared credentials rather than only removing the individual login. If a team password was known to the leaver, it is now a password known outside the business.
- Remove the person from MFA and authenticator enrolments, and from any recovery contacts on company accounts — an ex-employee left as a password-reset contact is an open door.
- Convert the mailbox rather than deleting it: forward to [named colleague or shared inbox] for [agreed period], set an out-of-office naming the new contact, then archive per the data retention policy.
- Revoke building access on the same schedule as system access — fobs, keys, alarm codes and, where relevant, the vehicle tracker or fuel card.
- Where the leaver held admin rights, have a second person confirm the removal, and check for automations, API keys and scheduled reports still running under their account.
- Record the date and time of removal on this form. If a dispute or an incident follows, "we think IT did it that week" is not an answer.

What to keep after someone leaves, and why

Offboarding is not deletion. You keep some records precisely because someone has left — payroll and tax records, pension records, right to work evidence, the leaver form itself, and anything relevant to a claim that could still be brought. What you should not do is keep the whole personnel file indefinitely because nobody wants to decide. The ICO says you must be able to justify how long you hold personal data, that the UK GDPR sets no specific time limits, and that you should have a policy with standard retention periods and review data periodically, erasing or anonymising it when it is no longer needed.

Set the retention decision at offboarding, while the reasons are fresh, rather than years later when nobody remembers what the file contains. Record the date the review is due on this form and in [HR system] so it happens.

- Keep, with a stated period in the data retention policy: payroll and tax records, pension and benefits records, right to work check evidence, the contract and written statement of particulars, and the leaver form.
- Keep where there is a live reason: outstanding grievance or disciplinary papers, redundancy selection records, anything relevant to a claim that has been intimated, and reference-request correspondence handled under the reference request procedure.
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Delete or anonymise on the stated schedule: recruitment notes, appraisal drafts, one-to-one notes, absence detail beyond what the retention policy justifies, and health information, which should carry the tightest period of all.

- Do not keep the leaver's mailbox as a general archive. Extract the business records that matter into the right folders, then close it — a mailbox is the least governed store you own.
- Do not add former employees to marketing or alumni lists on the basis of employment records; that is a new purpose and needs its own basis.
- Record who reviewed the file, on what date, and what was kept or removed — a one-line note is the difference between a retention policy and a retention intention.

Responsibilities and review

- [HR / the owner] owns this form, opens it when notice is given, assigns the checklist owners, and closes it out.
- The line manager owns the handover, the property return, and telling customers, suppliers and the team.
- [Payroll] owns the leaving date on the payroll record, the FPS entry, final pay, and issuing the P45.
- [IT] owns system access, credentials, mailbox handling, and confirming the date and time of removal.
- [Facilities] owns building access, keys, fobs and alarm codes.
- Completed forms are filed in [HR system / personnel file] and the checklist is audited [quarterly] to see which lines are habitually missed.
- This form is reviewed every [12 months] and whenever payroll software, the systems list, or GOV.UK guidance on leavers changes.

How to use this template

1. Open the form the day notice is given, name a single owner, and assign an owner and date to every line of the checklist before anything else happens.
2. Replace the bracketed placeholders with your own roles, systems and deadlines — the systems list in the access row is the one to expand first, because the missed accounts are always the small ones.
3. Check the contract before final pay: notice terms, any pay in lieu clause, and whether a written agreement exists to recover overtaken holiday, which GOV.UK requires before any deduction.
4. Schedule access revocation for the end of the last shift rather than the day notice is given, and record the date and time it was completed.
5. Offer the exit interview, hold it away from the leaver's own manager where that is the subject, and review the themes across leavers rather than acting on any single conversation.
6. Set the file retention review date at offboarding, file the signed form, and audit the completed checklists quarterly for the lines people keep missing.

Official guidance

TrainedTeamFree template · full version and updates at <https://trainedteam.com/templates/leaver-form-template>

- › [GOV.UK — What to do when an employee leaves \(PAYE\)](#)
- › [GOV.UK — P45, P60 and P11D forms](#)
- › [GOV.UK — Holiday entitlement: taking holiday before leaving a job](#)
- › [ICO — Principle \(e\): Storage limitation](#)
- › [Acas — Providing a job reference](#)

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