**Sample forms - exit interview form and leavers checklist**

**Exit interview form**

This form is to be used as part of an employee’s exit interview. Ideally the exit interview will take place at least a week in advance of the employee’s leaving, to enable the Organisation to understand the reasons for leaving, take remedial action where appropriate and to facilitate the transfer of knowledge and experience.

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| Employee name |
| Employee job title |
| Department |
| Line manager Date of exit interview |
| Commencement date Termination date |
| 1. What is your main reason for leaving? 2. What are the other reasons for your leaving? 3. What could have been done early on to prevent the situation developing/provide a basis for you to stay with us? |
| 1. What has been good/enjoyable/satisfying for you in your time with us? 2. What has been frustrating/difficult/upsetting to you in your time with us? 3. What could you have done better or more for us had we given you the opportunity? |
| 1. How could we have enabled you to make fuller use of your capabilities and potential? 2. How well do you think your training and development needs were assessed and met? 3. What training and development that you had did you find most helpful and enjoyable? |
| 1. What can you say about communications within the Organisation/your team? 2. What improvements do you think can be made to patient services and relationships? 3. How would you describe the culture or 'feel' of the Organisation? |
| 1. How well do you think the appraisal system worked for you? 2. What would you say about how you were motivated, and how that could have been improved? 3. How would you have changed the expectations/objectives (or absence of) that were placed on you? ...... And why? |
| 1. What suggestion would you make to improve working conditions, hours, shifts, facilities, etc? 2. How could the Organisation have enabled you to make better use of your time? 3. What, if any, unhelpful or irrelevant examples of policy, rules, instructions, can you highlight? |
| 1. What can you say about the way you were managed? 2. What things did the Organisation or management do to make your job more difficult/frustrating/non-productive? 3. How could the Organisation reduce stress levels among employees where stress is an issue? |
| 1. What can the Organisation do to retain its best people (and not lose any more like you)? 2. Have you anything to say about your treatment from a discrimination or harassment perspective? 3. Would you consider working again for us if the situation were right? |
| 1. Are you happy to say where you are going to in your next job (if you have decided)? 2. What particularly is it about them that makes you want to join them? 3. What, importantly, are they offering that we are not? |
| 1. Could you help us to understand some of the important things you've been working on - how might we agree for this knowledge to be transferred? 2. What can we do to enable you to pass on as much of your knowledge and experience as possible to your replacement/successor prior to your departure? 3. How and when would you prefer to pass on your knowledge to your successor? |
| And finally, if appropriate, could you be persuaded to renegotiate/stay/discuss the possibility of staying? |

**Leavers checklist**

This form is to be used as part of an employee’s leaving procedure, to help ensure that all matters are completed prior to and/or immediately after an employee leaves the Organisation’s employment.

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| Employee name | | |
| Employee job title | | |
| Department | | |
| Line manager | | |
| Termination date Final day at work (if different) | | |
| **PAY AND ADJUSTMENTS**   1. Prepare P45 and final pay statement      1. Inform HM Revenue & Customs, pension provider etc. 2. Include in the final payment all money owing, e.g. pay in lieu of working the notice period (if applicable), payment for untaken holidays, overtime and bonus payments 3. Include any deductions, e.g. for over-taken holiday, training fee repayments, loans, etc. 4. Is the employee is receiving Statutory Maternity Pay, Statutory Paternity Pay, Statutory Adoption Pay, Statutory Shared Parental Pay – the employer's responsibility continues after employment ends 5. For employees who are receiving working tax credits, or Statutory Sick Pay, further information can be found in the HM Revenue & Customs website gov.uk/hmrc 6. Clarify pension details (as appropriate) | Completed/ returned | N/A |
| **UPDATE EMPLOYEE DETAILS**   1. Forwarding address 2. Valid personal email address 3. Contact telephone number 4. Update HR/employee record system 5. Update hard copy employee file (to comply with Data Protection principles) 6. Other? |  |  |
| **RETURN OF ORGANISATION PROPERTY**   1. Keys (building/office/desk/filing cabinets) 2. Access/swipe card 3. Uniform 4. Personal protective clothing/equipment 5. PDA/laptop 6. Mobile phone 7. Files, manuals, books, papers, documents, business cards, training materials 8. Electronic files/documents 9. Library materials 10. Other? |  |  |
| **SECURITY & ICT SYSTEMS**   1. Remove employee from security system 2. Remove from phone/email directory 3. Disable email accounts 4. Disable/update business related social media accounts 5. Disable voicemail 6. Collect ID card 7. Collect Smart Card 8. Parking permit 9. Change locks/keys if necessary 10. Change security codes 11. Change computer passwords 12. Other? |  |  |
| **COMMUNICATION**   1. Advise other staff/external contacts as relevant of employee’s departure 2. Remove from authorised signatory lists and inform relevant persons 3. Update Organisation website (i.e. remove employee’s details and advise of new member of staff) 4. Inform relevant groups/committees as necessary |  |  |
| **OTHER** |  |  |
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