HR Handover Checklist

Employee Information

- ☐ **Name:** [Sample: John Doe]
- ☐ **Position:** [Sample: Marketing Manager]
- ☐ **Date of Joining:** [Sample: 2023-01-15]
- ☐ **Date of Exit:** [Sample: 2024-03-31]

Handover Details

- ☐ **Replacement's Name:** [Sample: Jane Smith]
- ☐ **Handover Date:** [Sample: 2024-03-20]
- ☐ **Documents Transferred:**

  - ☐ Employment contract
  - ☐ Performance reviews
  - ☐ Training records

Access and Credentials

- ☐ **Email Accounts:** Transfer and deactivate
- ☐ **Software Access:** Revoke or reassign
- ☐ **Physical Assets:** List items (e.g., laptop, keys) and return status

Ongoing Projects

- ☐ **Project Name:** [Sample: Product Launch 2024]
- ☐ **Status:** In progress
- ☐ **Key Contacts:** [Sample: Tom Brown, Project Coordinator]

Financial Information

☐ **Pending Reimbursements:** List and status

☐ **Final Payroll Date:** [Sample: 2024-04-15]

Exit Interview

☐ **Date Conducted:** [Sample: 2024-03-25]

☐ **Key Feedback Points:** Summary of discussion

Legal and Compliance

☐ **Confidentiality Agreement:** Confirmation of understanding

☐ **Non-Compete Clause:** Status and reminder

These checkboxes can be used to track completion of each item in the HR handover process, ensuring a comprehensive and orderly transition.