

Your handover checklist

Know what to gather. Know what to agree.

01 CURRENT WORK

- ☐ Outline headcount and current payroll and personnel workflow
- ☐ Identify the tasks to hand over and those to retain
- ☐ List current records, formats and unresolved work

02 SCOPE AND OWNERS

- ☐ Define preparation, review, submission and execution separately
- ☐ Confirm included activities, exclusions and additional charges
- ☐ Identify authorised input contacts and output approvers
- ☐ Agree exception and late-change handling

03 RECORD HANDOVER

- ☐ Agree secure transfer channel, authorised access and retention terms
- ☐ Confirm required joining and employee-change records
- ☐ Keep confidential employee information out of the initial website enquiry

04 FIRST CYCLE

- ☐ Agree the input cutoff and review dates
- ☐ Check records and reconcile authorised changes
- ☐ Review payroll and personnel outputs before approval
- ☐ Assign open items and confirm the next cycle's owners

05 COMMERCIAL REVIEW

- ☐ Separate recurring fees, setup work and additional charges
- ☐ Confirm any filings, notifications or payment execution expressly
- ☐ Review terms and responsibilities before administrative work begins

Planning checklist, not a service commitment or legal assessment.
Your company remains the employer. Confirm all activities in the agreement.
This checklist is a local preparation aid; it does not submit any information.