Joiner and leaver checklist

Most access mistakes happen at changeover. Fill in the systems once, then use the same list every time someone joins or leaves.

Person _____ Role _____

Start / last day _____ Manager _____

ACCOUNTS TO CREATE OR DISABLE

- [ ] Email and calendar
- [ ] File storage and shared drives
- [ ] Accounting / invoicing
- [ ] Payroll and HR
- [ ] CRM and booking systems
- [ ] Website, domain and social media
- [ ] Banking and payment platforms
- [ ] Password manager vault
- [ ] Remote access / VPN
- [ ] Any shared or legacy logins

LEAVER SPECIFICS

- [ ] Disable the account; do not just change the password
- [ ] Revoke active sessions and app tokens
- [ ] Set an out-of-office and a deliberate email forwarding decision
- [ ] Recover laptop, phone, keys, tokens and any storage media
- [ ] Remove from groups, distribution lists and shared vaults
- [ ] Tell regular contacts who now owns the relationship
- [ ] Record the date and who completed each step

DEVICES AND PROPERTY RETURNED

ITEM	SERIAL / ASSET ID	RETURNED	CONDITION

ITEM	SERIAL / ASSET ID	RETURNED	CONDITION

SIGN-OFF

Completed by

Date

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