SafeDaTech

HR tools

Joiners, movers and leavers access checklist

The HR and IT steps that keep access to personal data right when people join, change role or leave.

Most access problems happen when people change. Use this checklist every time someone joins, moves to a new role or leaves. Keep a signed copy in the personnel file.

Employee: [name] **Role:** [role] **Date:** [date] **Completed by:** [HR and IT names]

Joiners

- [ ] Confidentiality and data protection undertaking signed.
- [ ] Staff privacy notice given.
- [ ] Accounts created with only the access the role needs.
- [ ] Multi factor authentication switched on.
- [ ] Device issued, recorded in the asset register and encrypted.
- [ ] Data protection, security and AI use training booked within the first month.

Movers

- [ ] Access no longer needed for the old role removed.
- [ ] New access approved by the new line manager.
- [ ] Shared mailboxes, folders and groups updated.
- [ ] Any additional training for the new role booked.

Leavers

- [ ] Accounts disabled on the last working day, or immediately if the departure is not amicable.
- [ ] Passwords for shared accounts changed.
- [ ] Devices, ID cards, keys and documents returned and recorded.
- [ ] Work data on personal devices deleted, and confirmation obtained.
- [ ] Email forwarding or auto reply set up, if needed, for a limited period.
- [ ] Leaver reminded of continuing confidentiality obligations.
- [ ] Personnel file moved to the retention schedule.

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