I3 Digital
GULF COAST COMMUNITY FOUNDATION

Employee Separation Technology Checklist

When someone affiliated with your organization leaves, it should be standard operating procedure to evaluate what kind of access they had to technology resources and make sure that appropriate changes are made.

This is most often an employee, but you may also have board members, volunteers and contractors that had been assigned some level of access.

Below are some things to think about as you develop your organizational checklist for handling departures. A sample of a checklist can be found on the next page.

Workstation

- Change the user password.
- Do you need to disable remote access to the workstation? Changing the password should prevent remote access, but be sure that it does)

Communications

- Set up auto-forwarding and auto-reply on email accounts.
- Set a date when the account will be disabled or deleted. (It should happen after enough time has passed that email is no longer coming into that account.)
- Was the person responsible for monitoring any other accounts? (i.e., info@, finance@, etc.) Reassign.
- Do you need to set up auto-forwarding for voicemail?
- Remove the user's email address from any distribution groups that they were on.
- Unsubscribe the email address from your e-newsletter and others that are being received.

Cloud/Website/Data Access

- Change the user's password and/or permissions for cloud-based services (Google Apps, Office 365, Your Board Portal etc.)
- Change the user's password and/or permissions for your website.
- Change the user's password and/or permissions for accessing your database or shared files.
- Remove the person's name from online lists of staff or board or Contact Us pages.
- Do you have forms or printed materials that direct people to contact this person? Make changes.