

Someone is leaving. Keep the work moving.

A quick guide to your editable staff-leaver IT checklist.

1. **Agree who authorises the departure and when access stops.** Save a fresh workbook. Record a leaver reference, cut-off date, time and time zone. Assign responsible owners. Keep employment details out of the checklist.
2. **Find all the places they have access.** Include email, shared files, CRM, AI tools, supplier portals, VPN, social accounts and devices. Agree who takes over their work and what records must be kept.
3. **Block access at the approved time.** An authorised administrator should block sign-in, revoke sessions and check separate applications. Remove privileged access and rotate shared secrets where necessary. Verify the result; some sessions may persist temporarily.
4. **Hand over the work using approved access.** Preserve required files and mail. Reassign cases, tasks, reports and automations. Give replacement staff their own authorised access and test that the work still runs.
5. **Collect equipment and record exceptions.** Record returned assets and anything missing. Check required records before reuse or deletion. Every unfinished item needs an owner, next action and due date.

Block access first. Decide deletion separately.

Check retention requirements, any preservation hold, licences and dependencies before removing accounts or data. Do not share the leaver's password or routinely wipe personal devices. Keep passwords and recovery codes out of the workbook.

A completed handover can still have a follow-up

The fictional example leaves a retention review marked Waiting. The manager can review the handover while that future action remains assigned. A completed-task count is not proof that every risk is resolved.

Need help with a staff change?

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