

Prepare a joiner or leaver handover

Bring HR, the manager and IT together around access, equipment and the information the business must keep.

6 min read | Reviewed 15 October 2026

BEFORE YOU START

Use a controlled HR or service-desk request. Agree the authorised approver, effective date and time, and who will confirm completion. Avoid circulating personal documents unnecessarily.

01 For a joiner: define the job

List the applications, groups, shared folders and equipment needed for the person's role. Identify each owner who can approve access; copying all permissions from a colleague can carry unnecessary access across.

Ask IT to create the individual account and allocate suitable licences under your approved process. Arrange MFA setup and a first-day check of sign-in, mail, Teams and the business applications actually needed.

02 For a leaver: plan preservation first

Confirm the departure timing with HR and the manager. Ask them to nominate an authorised owner for business mail and files, and identify retention or legal-hold requirements before changes are made.

Have IT plan sign-in blocking, session/access review, data handover and equipment return. Account deletion or licence removal can affect access to data; these need an approved, tenant-specific sequence.

03 Close the handover

Include non-Microsoft applications, shared credentials, phone services and external access in the review. Owners should authorise any mailbox delegation or forwarding rather than assuming it is permitted.

Record completed actions and exceptions against the request. Confirm who owns any remaining task, including returned equipment, recovery of business data and a later access review.

Your practical checklist

Prepare a joiner or leaver handover

- ☐ Manager / HR approval and effective time confirmed
- ☐ Role-based access and licence needs listed
- ☐ MFA / first-day checks or leaver sign-in plan agreed
- ☐ Data owner and preservation decisions documented
- ☐ External services and equipment included
- ☐ Completion evidence and outstanding actions recorded

Record the next action

Request reference / authorised approver / effective time

Data and equipment owners

Exception, action owner and due date

This is a planning checklist, not authority to delete data or change another person's access. Administrators must follow the organisation's retention, employment and access policies.

OFFICIAL SOURCES & FURTHER READING

Microsoft: add users to Microsoft 365

Microsoft: remove a former employee

Links open the official source. Web edition: compurep.co.za/guides/joiner-leaver-checklist