

Secure the handover

CHECKLIST · 01

Start as soon as the change is known. Assign each item, set a due date and test access before the outgoing provider leaves.

BUSINESS _____	HANDOVER OWNER _____
OUTGOING PROVIDER CONTACT _____	INCOMING PROVIDER CONTACT _____
TARGET HANDOVER DATE _____	EVIDENCE FOLDER _____

01

PRIORITISED FIRST STEP**Test business-controlled administrator access.**

Do this before giving notice, cancelling services or removing the outgoing provider. A username on a list is not proof. Complete a sign-in and confirm the recovery method works.

1

Access and ownership

- ☐ **Microsoft 365 or Google Workspace:** sign in with a business-controlled administrator account.
- ☐ **Domain and DNS:** record the registrar, DNS host, account owner and business recovery details.
- ☐ **Website and key business apps:** confirm administrator access without relying on a provider-owned address or phone.
- ☐ **Recovery methods:** remove old personal details and keep two authorised recovery paths where the platform allows it.

OWNER _____

DUE DATE / EVIDENCE _____

2

Documentation and suppliers

- ☐ **System guide:** collect plain-English steps for email, files, internet, phones, printers, backups and key apps.
- ☐ **Service register:** list each service, administrator, billing owner, renewal date, notice period and cancellation process.
- ☐ **Equipment register:** list computers, mobiles, printers, servers and network equipment with user, location and ownership.
- ☐ **Open work:** record unresolved issues, known faults, renewals and projects in progress.

OWNER _____

DUE DATE / EVIDENCE _____

Finish without loose ends

CHECKLIST · 02

3 Backups and recovery

- ☐ Record what is backed up, how often, where copies are stored and how long they are kept.
- ☐ Confirm who receives failed-backup alerts and who owns the backup service.
- ☐ Restore a sample file, mailbox or agreed data set. Record the date and result.
- ☐ List excluded systems or data so the business owner can accept or fix the gap.

OWNER

DUE DATE / EVIDENCE

4 Handover day

- ☐ Test administrator sign-ins and multi-factor approval with the incoming provider present.
- ☐ Open the domain, DNS, website, email, backup and major software portals.
- ☐ Test connected services such as scan-to-email, website forms, accounting and booking tools.
- ☐ Confirm licence continuity, billing dates, open issues and a short path for follow-up questions.

OWNER

DUE DATE / EVIDENCE

5 After the new setup is confirmed

- ☐ Remove the outgoing provider's administrator and remote access that is no longer required.
- ☐ Change shared or transferred credentials and remove unknown devices or recovery methods.
- ☐ Review former staff, unused devices, administrator roles and software licences.
- ☐ Store the final system guide and evidence somewhere protected and controlled by the business.

OWNER

DUE DATE / EVIDENCE

HANDOVER SIGN-OFF

BUSINESS OWNER

INCOMING PROVIDER

COMPLETED DATE

A SECOND SET OF EYES

Check control before notice.

JCPIT can test administrator access, domain control, backups and licence continuity. You receive a short list of anything to secure before the handover.

jcpit.com.au/free-security-check/

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Keep a protected copy with your business continuity records. Do not store live passwords in this checklist. Store the completed checklist securely. Do not record passwords, authentication codes, full bank details or unnecessary personal information.