

Access Request Checklist

Request only the permissions you need, using secure access methods and clear ownership.

ACCESS PRINCIPLES

- ☐ Use role-based access where possible
- ☐ Avoid asking clients to send passwords through chat or email
- ☐ Use password managers or native user invitations
- ☐ Request the lowest level of access needed to do the work
- ☐ Document who granted access and when
- ☐ Remove access when the engagement ends

COMMON ACCESS REQUESTS

- ☐ Email / shared inbox
- ☐ Calendar
- ☐ Google Drive / Dropbox / OneDrive
- ☐ Project management tool
- ☐ CRM
- ☐ Website / CMS
- ☐ Analytics
- ☐ Social media accounts
- ☐ Meta Business Manager / Ads Manager
- ☐ Google Ads
- ☐ Email marketing platform
- ☐ Design tools / Canva
- ☐ Ecommerce platform
- ☐ Customer support platform
- ☐ Automation tools
- ☐ Payment / billing platform (only if role requires it)
- ☐ Other: _____

ACCESS LOG

FIELD	DETAILS
Platform / Tool	
Access Level Needed	
Invite Email / Username	
Requested On	
Granted On	
Granted By	
Security Notes	
Removal Date	