



Cambridgeshire
County Council



Staff Leaver Checklist

Primary Schools

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Accounts & Permissions Guidance/Checklist – includes generic email accounts for Staff & Governors

Important Note: Ensure that login details for essential school administrative accounts, especially Secure Access, are retained in a secure place to cover any sudden unavailability of key staff members.

Accounts and access permissions need to be deactivated or deleted when a member of staff leaves – please note the following important points:

- Make arrangements, in advance of the leaving date, regarding the transfer of any data/folders/emails that need to be passed on from departing Heads/Administrators/Finance Officers/SENCOs etc to new personnel.
- Remind all staff leavers to carry out housekeeping routines in their folders and email accounts in advance of the leaving date.
- Accounts will be deleted soon after the leaving date and it may not be possible to retrieve deleted documentation should it be needed at a later date.

The following areas may not be relevant to all staff, but please check:

Personnel	Leaving information should be entered in SIMS Personnel as appropriate – end contract, etc – usually completed by Personnel Officer/Assistant
Active Directory Account (Windows login)	Account on school server which enables staff to access school computers – ensure the account is deactivated/password reset according to school's normal procedure
Central Hosting Account	Managed in the Admin Tool by the school's Admin Tool User (ATU) – it is expected that every school will have its own trained ATU – Disable User Account initially – then Delete User Account when confirmed that no data from the account will be required – disabling or deleting an account will remove access to SIMS, FMS, Email and Centrally Hosted folders.
SIMS Account	Should be deactivated in SIMS by the school's SIMS System Manager – Focus System Manager Manage Users – open the user's account – untick the Active box and reset the password
FMS Account	Should be deactivated in FMS by the school's FMS Administrator – Tools Manage Users – highlight the User ID – click Access Rights – select No Access – click Save
Generic Email Accounts	<p>Extreme care should be taken when there is a change of user for these accounts e.g. Head@, Office@, Finance@, Chair@, Clerk@ – some schools may have set up additional similar accounts, such as SENCO@, and these may need to be treated in the same way:</p> <ul style="list-style-type: none"> ▪ Head@, Office@ and Finance@ – these are pre-existing stand-alone email accounts and should remain so – correspondence from Local Authority departments (including The ICT Service) is sent out to these generic email addresses.

	<p>The school's ATU should remove the leaver's permission to access these email accounts – highlight the relevant email account in the Admin Tool, e.g. Office@ > right click and go to Email Tasks > Mailbox Permissions – highlight the leaver's name and click Remove.</p> <p>Reset the generic account password whenever there is a change in the personnel who have access to it, as this type of account can still be accessed online if the password is known.</p> <p>The generic email accounts themselves should not be deleted or changed.</p> <p>There should be no automatic forwarding from these accounts to other email accounts.</p> <p>There must be a historical record of correspondence available to the incoming Head/Administrator/Finance Officer.</p> <ul style="list-style-type: none"> ▪ Chair@ & Clerk@ – these are pre-existing stand-alone Governor email accounts and should remain so – correspondence from Local Authority departments (including The ICT Service) is sent out to these generic email addresses. <p>Whenever there is a change of Chair/Clerk, the ATU should reset the generic account password in the Admin Tool so that the previous Chair/Clerk can no longer access the account. The new password should then be given to the new Chair/Clerk to enable access to the account.</p> <p>The accounts themselves should not be deleted or changed.</p> <p>There should be no automatic forwarding from these accounts to other email accounts.</p> <p>There must be a historical record of correspondence available to the incoming Chair or Clerk.</p>
<p>Admin Tool User/Operator (ATU)</p>	<p>If possible, arrange for a new ATU to be authorised and trained before the existing ATU leaves. Schools can have more than one ATU.</p> <p>When the personal Central Hosting account of the ATU leaver is deactivated, this will remove access to the Admin Tool. The Helpline can also remove ATU permissions.</p> <p>If necessary, the Helpline can temporarily assist with Admin Tool requirements during periods with no ATU; but for security reasons it is preferable for schools to have their own designated ATU(s).</p>

Login credentials for other modules/programmes/websites	<p>Transfer/cancel/deactivate logins as appropriate, e.g. SIMS Learning Gateway (SLG), Secure Access (includes S2S, COLLECT, KtS, GIAS, ASP), NCA Tools, Fischer Family Trust (FFT), Agora, Schoolcomms, WebCAT, etc</p> <p>Note: SIMS Learning Gateway (SLG) schools – staff SLG accounts must be unprovisioned when they leave. Use SIMS Routines Provision Users Staff Remove Staff – search and click on the relevant staff record, then Save.</p>
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Tick Sheet (accounts/permissions as appropriate for each staff member)		
Name:		
Accounts / Permissions	Completed	Comments / Queries
SIMS Personnel Details		
Active Directory Account		
Central Hosting Account: SIMS Access FMS Access Microsoft Office Access Personal Mailbox Schoolcomms Access Discover Access Level 3 Access		
SIMS Account		
FMS Account		
Generic Email Account Access: Head@ Office@ Finance@		
Governor Generic Email Access: Chair@ Clerk@		
Admin Tool User/Operator (ATU)		
Other modules/programmes/websites: SIMS SLG Secure Access NCA Tools FFT Aspire Agora Schoolcomms WebCAT		
Additional Accounts/Notes		

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