Date/ Time: ....

Date of Last Audit: ....

Procedure Location: ....

Date of Last Staff Training: ....

checklist

AMS360 Security

- ☐ Review Add/Inactivate – Employees
- ☐ Review/Update Each Employee's Details
- ☐ Review/Modify/Delete – Product Access For Each Staff Member
- ☐ Review/Modify/Delete – Security Group Access
- ☐ Review/Modify/Delete – Security Permissions For Each Security Group
- ☐ Review/Modify/Delete – Secure Customer Access
- ☐ Review/Modify/Delete – Business Units Access
- ☐ Review/Modify/Delete – Bank Accounts Access
- ☐ Review/Modify/Delete – Document Security – Accounting
- ☐ Review/Modify/Delete – Document Security - Employees

Insurance Companies Security

- ☐ Review/Inactivate – Active employees

📌 *This tool can also be used for verifying access for new and terminated users.*

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