Client access review checklist

Compare expected access with what the recipient can actually see and do. Blank or 'Not tested' is not a pass.

Client / project

Recipient name / role

Reviewer

Review date

Associated client record(s)

Allowed projects and tasks / intended audience

1. Check using the recipient's access

Access area	Expected access	Pass / Fail / Not tested	Evidence / finding
Assigned projects / tasks			
Time and report fields			
Invoices, including drafts			
Internal cost and rate fields			
Comments / files			
Create / edit / delete actions			
Exports / public links			
Revoke access and re-test			

2. Resolve findings before sharing

Finding, required change, owner and due date

Reporting channel / frequency

Decision / approval record location

☐ Ready to share ☐ Hold until findings resolved ☐ Re-test required

Release owner

Next review date

Evidence / review reference

Review each recipient role separately. Record the actual product behavior; this checklist does not grant permissions or approve scope changes.