

DTC Employee Lifecycle Form

Joiner / Mover / Leaver .. client intake, asset custody, and sanitization record

Request + employee

Page 1 of 6

1. Request details

Fields marked * are required. Everything else is optional .. complete what applies to your action.

Business / organization name *	Site / location		
Submitted by (name) *	Submitter email *	Submitter phone	
Action (choose one) *	Effective date *	Effective time	
☐ Joiner .. onboard	☐ Mover .. role change	☐ Leaver .. offboard	
Date submitted	Priority (DTC priority map)	Termination type (leavers) *	DTC ticket #

Priority follows the DTC priority map. Standard lifecycle requests run at 3 .. Normal. Priority 1 is reserved for same-day security risk.

How to fill this form, top to bottom: everyone completes Sections 1 and 2, then follows their action.
Joiner > Sections 3, 5, 6 .. then Section 9 only if hardware ships. Sign Section 12.
Mover > Sections 4, 5, 6 .. then Sections 9 + 10 if any device or item changes hands. Sign Section 12.
Leaver > Sections 7, 9, 10 .. DTC completes Sections 8 + 11. Sign Section 12.

Involuntary or for-cause leaver? Call DTC at 410.877.3625 before submitting this form.
We disable access silently first and restrict ticket visibility so the employee cannot see the request.

2. Employee information

Full legal name *	Preferred name	
Job title / role	Department / team	
Manager	Employee ID	Work location
Work email (existing or requested)	Personal email (credential handoff)	
Mobile phone	Office phone / extension	Start date / last working day

DTC Employee Lifecycle Form

Joiner / Mover / Leaver .. client intake, asset custody, and sanitization record

Joiner / Mover

Page 2 of 6

3. Joiner .. new hire provisioning

Joiners only. Movers skip to Section 4. Leavers skip to Section 7.

Mirror / template user (copy access from)	Requested email address *	
License bundle	Line-of-business app role (PMS, EHR, ERP)	Phone extension (if needed)
Hardware	Ship hardware to (site or address)	Hardware needed by

Hardware that ships rides a Related Install ticket and closes on confirmed receipt. No hardware moving, no Install.

4. Mover .. role / access change

Movers only. Joiners skip to Section 5. Leavers skip to Section 7.

Previous role	New role *	Change type
Previous department	New department	New manager
Access to grant (new role)	Access to revoke (old role)	

A Mover is not complete until old-role access is removed. DTC revokes prior-role access as part of this request .. least privilege by default. List anything the employee must keep in the grant column.

5. Additional groups (beyond team / department defaults)

Joiners + Movers. DTC applies standard team and department groups automatically .. list only extra security or distribution groups.

Group name or email	Type	Action	Reason / approver

6. Additional application access (beyond standard role kit)

Joiners + Movers. Apps beyond the standard kit for this role. License-bearing apps may be quoted and approved before provisioning.

Application	Access level / role	License req'd	Reason / approver

DTC Employee Lifecycle Form

Joiner / Mover / Leaver .. client intake, asset custody, and sanitization record

Leaver + access

Page 3 of 6

7. Leaver .. departure details

Leavers only. Joiners and Movers skip to Section 9 if hardware moves, otherwise sign Section 12.

Last working day *	Last time	Rehire eligible	Employee keeps device?

Mailbox handling *	Mailbox delegate / forward to	Hold until (date)

Files / OneDrive data owner	Phone / extension reassign to	Voicemail

Remove from distribution lists / shared mailboxes (list, or write ALL)

Physical items to collect .. detail every item + receiver in Section 10

☐ Badge / fob	☐ Keys	☐ Laptop	☐ Phone	☐ Tablet	☐ Other:	
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Identity is disabled at the effective time and the ticket resolves fast on the security side. It then sits at Resolved .. pending asset return, and cannot fully close until the data-owner / retention gate and the sanitization gate both clear (every returned device wiped, with certificate, per POL-MP-002).

8. Access revocation checklist (DTC use .. technician completes)

☐ Directory sign-in disabled	☐ Active sessions + tokens revoked	
☐ MFA methods cleared	☐ Password reset to random	
☐ SSO app assignments removed	☐ VPN / remote access revoked	
☐ LOB / business app accounts disabled	☐ Licenses reclaimed	
☐ Removed from DLs / shared mailboxes	☐ MDM retire / wipe issued (if BYOD)	
Completed by (technician)	Date	Notes

9. Asset movement + chain of custody (tracked devices)

One block per tracked device (laptop, desktop, phone, tablet). Duplicate this page for more than two.

Every returning item .. including small items like fobs and keys .. ALSO gets a line in the Section 10 manifest.

Wipe / sanitize is PERMANENT. Once checked, assume the data is gone the moment DTC starts the ticket .. a wipe sent to a roaming device cannot be recalled.

Asset A

Asset tag	Type	Make / model	Serial number
Direction	Transfer to / destination (user, site, or room / bin)		Ownership
☐ Wipe / sanitize			
Asset status	Condition at dispatch	Condition on receipt	Received / inspected by
Accessories / peripherals included			
☐ PSU / charger ☐ Dock ☐ Monitor ☐ Keyboard ☐ Mouse			
☐ Headset ☐ Bag / case ☐ Stylus ☐ SIM card ☐ Cables Other:			
Carrier	Tracking #	Ship date	Received date
Ticket #			
Chain of custody	Date / time	Released by	Received by
			Location

Asset B

Asset tag	Type	Make / model	Serial number
Direction	Transfer to / destination (user, site, or room / bin)		Ownership
☐ Wipe / sanitize			
Asset status	Condition at dispatch	Condition on receipt	Received / inspected by
Accessories / peripherals included			
☐ PSU / charger ☐ Dock ☐ Monitor ☐ Keyboard ☐ Mouse			
☐ Headset ☐ Bag / case ☐ Stylus ☐ SIM card ☐ Cables Other:			
Carrier	Tracking #	Ship date	Received date
Ticket #			
Chain of custody	Date / time	Released by	Received by
			Location

10. Return manifest .. every item coming back + who received it

Check Return for each item the employee is handing back. Items can go to different people .. a fob to the office manager, a laptop to DTC, keys to facilities. Record the receiver for every line.
Check Wipe for anything that stores data .. each wiped item gets a certificate in Section 11.
WIPE IS PERMANENT. Once checked, assume the data is gone the moment DTC starts the ticket.
Save anything you need first .. a wipe sent to an off-site device cannot be recalled.

Return	Item type	Tag / ID	Description	Return to (person / role)	Received by + date	Wipe
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐
☐						☐

Tracked devices (laptops, desktops, phones, tablets) also get a detailed block in Section 9. More than 12 items? Duplicate this page.

Manifest completed by

Date

Return ticket #

11. Certificate of Sanitization (DTC completes .. one per wiped device)

Wiping follows DTC Data Destruction Policy POL-MP-002, aligned to NIST SP 800-88 (Clear / Purge / Destroy). BYOD devices get a selective MDM wipe of company data only. This certificate attaches to the return-Install ticket and the asset record. Disposition drives the method: reuse vs disposal.

Device 1

Asset tag	Make / model	Serial number	
Wipe method	Tool used for the wipe	Wipe verified? (post-wipe check)	
Device outcome (disposition)	Technician (performed wipe)	Ticket #	Wipe date

Device 2

Asset tag	Make / model	Serial number	
Wipe method	Tool used for the wipe	Wipe verified? (post-wipe check)	
Device outcome (disposition)	Technician (performed wipe)	Ticket #	Wipe date

Device 3

Asset tag	Make / model	Serial number	
Wipe method	Tool used for the wipe	Wipe verified? (post-wipe check)	
Device outcome (disposition)	Technician (performed wipe)	Ticket #	Wipe date

12. Authorization + sign-off

Client authorized by (print) *	Title	Signature *	Date *
Data handoff received by (data owner, print)	Signature	Date	

DTC Information Revocation (Account / Access) completion .. all account + access revocation on this request is done per Section 8.

Technician (print)	Signature	Date	Ticket #

DTC Asset Wipe Completion (Information Wiping) .. every device flagged wipe-required is sanitized + certified per Section 11.

Technician (print)	Signature	Date	Ticket #

Submitting this form authorizes DTC to provision, change, or revoke the access described, and to collect and sanitize listed devices.