

# File-sharing review checklist

Review a fictional file and its intended recipient before sharing. Use your organisation’s approved process for real information.

## Review the file

Purpose and intended recipient

File version reviewer and date

Mark C for complete, W for work needed or N for not applicable.

| Status | Check                                         |
|--------|-----------------------------------------------|
|        | Purpose and intended recipient clear          |
|        | Correct file and version selected             |
|        | Contents reviewed for restricted information  |
|        | Comments and hidden content considered        |
|        | Recipient address or identity checked         |
|        | Sharing method approved for the information   |
|        | View or edit permission deliberately selected |
|        | Access limited to intended recipients         |
|        | Uncertainty referred to an authorised person  |
|        | Decision and follow-up recorded               |

# Record issues and decisions

Issue or uncertainty to resolve

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Change needed and responsible person

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Sharing decision and next review

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Original RDE practice aid. Personal and internal organisational adaptation permitted with Jefferson Otonbara Imgbi author credit retained. Keep restricted information in authorised systems. Use fictional examples. Do not enter passwords, recovery codes or restricted information in this document.