HR CONSULTANCY LAUNCH PROGRAMME · ADD A SECURE CLIENT AND DOCUMENT PORTAL

Secure portal setup checklist

The controls a client portal needs before you put a single file in it, aligned to your Module 3 data map.

01 Access control

Every client sees only their own files. This is the line between a portal and a shared drive.

Per-client access, so nobody sees another client's documents

A named list of who on your side can open each client's files

A way to remove access the day someone leaves or a client ends

02 MFA and encryption

The basics that keep sensitive files safe in transit and at rest. This ties back to Module 3 security.

Multi-factor authentication turned on for you and for clients

Encryption in transit and at rest, confirmed with your provider

Strong, unique passwords, held in a password manager

03 Retention aligned to your data map

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Files should not outlive their purpose. Match this to the Module 3 data map.

A retention period for each type of document you hold

Contracts, policies, case files, ID checks. Each has its own clock.

A deletion routine that actually runs, not just a policy

A record of what you hold and where, so nothing is forgotten

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