

Page Roles and Access Checklist

Purpose: a one-page checklist to decide who gets what level of access to your Facebook Page, add and remove people safely, and review access every quarter. Print it or copy it into a spreadsheet.

Note: Facebook has replaced the old "Page roles" (Admin, Editor, Moderator, Advertiser, Analyst) with "Page access": full control, partial control and task access. Menu labels change from time to time, so check Meta's current help if a screen looks different.

1. Access levels at a glance

- Full control: can switch into the Page, post, change settings, give access to others, remove people (including you) and delete the Page. Equivalent to the old Admin.
- Partial control: can switch into the Page and handle content, messages, comments, ads and insights. Cannot delete the Page or manage who has access.
- Task access: can do chosen jobs (content, messages, ads, insights) through Meta Business Suite or Ads Manager. Cannot switch into the Page itself.

2. Who should have what (fill in)

Person	Role in the business	Level	Why they need it	Date added	Added by	Two-step verification on? (Y/N)	Review date
[Owner]	Owner	Full control	Ultimate control	[date]	[name]	Y	[date]
[Deputy]	Trusted backup	Full control	So we are never locked out	[date]	[name]	Y	[date]
[Social manager]	Posts and replies	Partial control or task access	Day-to-day work				
[Agency]	Content, ads	Partner or task access via business portfolio	Managed service				
[Designer]	Creates images	Task access (content only)	Uploads and scheduling				
[Finance]	Reports	Task access (insights only)	Monthly figures				

Rules:

- Always keep at least two people with full control.
- Give the lowest level that does the job.
- Individuals need a personal Facebook account. Pages and businesses cannot be added as people.
- Agencies are best added as a partner through a business portfolio, not as individual staff.

3. Adding someone (Page not in a business portfolio)

- ☐ Confirm what they need to do and choose the lowest suitable level.
- ☐ Ask for the exact email address or profile name they use on Facebook.

- ☐ Check they have two-step verification on their own account.
- ☐ Switch into the Page (profile picture, choose the Page).
- ☐ Open Settings and privacy, then Settings, then Page setup, then Page access.
- ☐ Click Add new under Facebook access (or task access).
- ☐ Search by name or email, click Next.
- ☐ Choose the level. Turn on "full control" ONLY if needed.
- ☐ Click Give access, enter your password, confirm.
- ☐ Tell the person to expect the invitation and to accept it (it can expire after around 30 days).
- ☐ Note it in the table above.

4. Adding someone or an agency (Page in a Meta business portfolio)

- ☐ Open Meta Business Suite and choose the right portfolio.
- ☐ Settings, Accounts, Pages, select the Page.
- ☐ Assign people (individual) or Assign partner (agency Business ID).
- ☐ Individuals must be in the portfolio first (Users, People).
- ☐ Choose: partial (business tools only), partial (business tools and Facebook), or full access.
- ☐ Assign, then confirm the person or agency has accepted.

5. When someone leaves (same day)

- ☐ Remove their Page access (Page setup, Page access, options beside their name, Remove access).
- ☐ Remove them from the business portfolio and from connected ad accounts.
- ☐ Remove them from your password manager and shared inboxes.
- ☐ Change any shared passwords they knew (and stop sharing passwords).
- ☐ Check at least two full-control people remain.
- ☐ Update the table in section 2.

6. Quarterly access review (10 minutes)

- ☐ Open Page access and compare the list to section 2.
- ☐ Remove anyone who has left, finished a project or changed role.
- ☐ Downgrade anyone with full control who does not need it.
- ☐ Remove old agencies and tools connected to the Page.
- ☐ Confirm two-step verification is on for everyone with access.
- ☐ Confirm the login email and recovery phone for the owner are current.
- ☐ Record the date of this review: [date]. Next review: [date + 3 months].

7. If something goes wrong

- Person not found in search: use their exact email or personal profile name; check spelling; ask them to check they are not restricted or blocked.
- Invitation not received: ask them to check notifications and spam; remove the pending invitation and resend it.
- Accepted but no access: ask them to refresh, log out and back in; check for conflicting access in a business portfolio.
- Cannot see Add new: you may not have full control. Ask the Page owner.

- Suspicious message asking you to add a "support admin" or to share a code: do not respond. Report it, and check your access list.
- Locked out with no admin left: use Meta's access recovery or request-access process.

8. Security basics

- Never share your personal Facebook password. Add people through Page access instead.
- Turn on two-step verification (an authenticator app is better than text messages, and any is better than none).
- Use a unique password for every account, kept in a password manager.
- Review access every quarter.

Want a hand putting this into practice?

Delivered Social is a social media, SEO and web agency based in Guildford and Portsmouth. Say hello at deliveredsocial.com/contact/ and we will point you in the right direction.