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Onboarding and offboarding IT checklist

When someone joins

Before their first day

- [ ] Order their laptop in time for it to arrive and be set up.
- [ ] Set up the laptop to your standard: encrypted, updated and protected.
- [ ] Create their email account and add them to the right groups.
- [ ] Give them a license for each app they need, and nothing they do not.
- [ ] Set up their password manager.
- [ ] Decide which shared files and folders they may open.

On their first day

- [ ] Hand over the laptop, or confirm it has arrived at their home.
- [ ] Sign them in once and set up 2-Factor Authentication.
- [ ] Check that email, chat and their main apps open.
- [ ] Show them how to ask for IT help.
- [ ] Add the laptop and its owner to your list of equipment.

In their first week

- [ ] Enroll them in security awareness training.
- [ ] Check that updates have installed on the laptop.
- [ ] Ask whether anything is missing or not working.

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When someone leaves

Before their last day

- [ ] List every account and app they use, including ones they signed up for themselves.
- [ ] Decide who takes over their files, email and shared documents.
- [ ] Arrange how the laptop will come back, with a prepaid box if they work from home.

On their last day

- [ ] Block their sign-in to email and every other account.
- [ ] Remove them from shared files, groups and chat.
- [ ] Forward their email to the person taking over.
- [ ] Change any shared passwords they knew.
- [ ] Lock the laptop.

Afterward

- [ ] Recover the laptop and wipe it before anyone else uses it.
- [ ] Cancel or reassign their licenses, so you stop paying for them.
- [ ] Update your list of equipment.
- [ ] Keep a record of what was done and when.

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