

Employee Onboarding & Offboarding IT Checklist

People coming and going is one of the most common sources of IT headaches and security gaps. Use this checklist every time someone joins or leaves. It works best with one person owning each step.

How to use: Check only what you can confirm is in place today, then total your checks at the end.

1 Before day one

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- ☐ **Account created using your naming standard**
With a manager-approved list of what they need access to.
- ☐ **Licenses assigned based on role**
Microsoft 365, line-of-business apps, phone system.
- ☐ **Added to the right groups, shared mailboxes, and Teams**
Use groups by role, not one-off permissions.
- ☐ **Computer prepared, enrolled in device management, encrypted, and updated**
- ☐ **Phone extension, email signature, and building access set up**

2 Day one

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- ☐ **MFA enrolled and tested**
Before they access anything sensitive.
- ☐ **Password manager set up**
- ☐ **Acceptable use and security policies reviewed and acknowledged**
- ☐ **Security awareness training assigned**
- ☐ **Shown how to get IT help**
Phone, portal, and what to do if something looks suspicious.

3 Offboarding: at the time of departure

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- ☐ **Sign-in disabled and active sessions revoked**
At the moment they leave, not at the end of the week.
- ☐ **Password reset and MFA methods removed**
- ☐ **Access removed from cloud apps outside Microsoft 365**
The easiest step to miss: CRM, accounting, banking, vendor portals, social media.
- ☐ **Shared passwords they knew are changed**
Wi-Fi, alarm codes, shared accounts.

☐ Remote access tools and VPN accounts removed

4 Offboarding: within the first week

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☐ Mailbox converted to shared or forwarded to their manager

☐ OneDrive files transferred to the manager or a team site
Before the account is deleted.

☐ Company devices returned and wiped; company data removed from personal phones

☐ Removed from groups, distribution lists, and Teams

☐ License reclaimed and account deleted per your retention policy
Stop paying for users who've left.

Your score

Items checked: ____ of 20 = ____ %

90-100%

Strong

You have solid fundamentals.
Review this checklist twice a year
to keep it that way.

65-89%

Gaps to close

A good base with a few real
exposures. Start with the
unchecked items in the first two
sections.

Below 65%

At risk

Several core protections are
missing. Prioritize now, before an
incident sets the agenda for you.

Make onboarding and offboarding someone else's job.

FUSION 1 handles user setup and removal as part of managed IT, following a documented checklist every time.

[Book a free IT review](#)

Call or text 814-499-2119
Toll-free 888-279-9776

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