CHECKLIST INTELLIGENT iT OPERATIONS

IT Onboarding & Offboarding Checklist

Ensure secure, consistent account provisioning and deprovisioning for every employee.

A standardized onboarding/offboarding process reduces security risk and ensures productivity from day one. Use this checklist for every hire and departure.

ONBOARDING — ACCOUNT SETUP

- [ ] Create user account in Active Directory / identity provider
- [ ] Assign Microsoft 365 / Google Workspace license and configure email
- [ ] Set up MFA enrollment and verify with user on first day
- [ ] Provision access to required line-of-business applications
- [ ] Add user to correct security groups and distribution lists

ONBOARDING — DEVICE & EQUIPMENT

- [ ] Provision laptop/workstation with standard OS image and security tools
- [ ] Enroll device in MDM and apply compliance policies
- [ ] Assign phone system extension or soft phone license
- [ ] Provide any required peripherals (headset, monitor, docking station)

ONBOARDING — TRAINING & DOCUMENTATION

- [ ] Schedule security awareness training within first week
- [ ] Share IT policies: acceptable use, password policy, data handling
- [ ] Provide help desk contact info and ticket submission process
- [ ] Walk through VPN setup and remote access procedures

OFFBOARDING — ACCESS REVOCATION

- [ ] Disable user account in Active Directory / identity provider immediately
- [ ] Revoke access to all SaaS applications and cloud portals
- [ ] Remove from security groups, distribution lists, and shared mailboxes
- [ ] Terminate VPN and remote access credentials
- [ ] Reset passwords on any shared or service accounts the user accessed

OFFBOARDING — DATA & DEVICE RECOVERY

- [ ] Back up user's email, files, and OneDrive/Google Drive to secure archive

- [ ] Transfer ownership of shared files and projects to manager
- [ ] Collect and inventory all company devices (laptop, phone, badge, keys)
- [ ] Wipe and reimage returned devices; update asset inventory
- [ ] Confirm all data retention requirements are met per company policy