

NAPLES COMPUTERS HOW-TO • BUSINESS I.T.

Employee Onboarding and Offboarding: The Tech Checklist

A new employee starting, or someone leaving, is a normal part of running a business, but the tech side gets missed more often than you'd think. This guide is a plain-English checklist for both: what to have ready before day one, and what to do the day someone leaves.

Two moments that matter

What happens on day one, and on the last day, says a lot about how secure your business is.

Ready before day one

Accounts, a computer, and the right access, set up before they walk in.

Exactly the access they need

Not more, not less, and nothing left over from a role they don't have anymore.

Cut off the same day they leave

Access doesn't linger for days or weeks after someone's gone.

Step by step

ONBOARDING**Set up before they walk in**

Email and Microsoft 365 accounts, a computer with standard apps and security software, and the right folder permissions.

WHAT TO DO

A new hire who's locked out on day one makes a bad first impression, and wastes a morning.



- ✓ Security policies
- ✓ Backup agent
- ✓ Business apps

Ready to go, **before** they sit down

OFFBOARDING

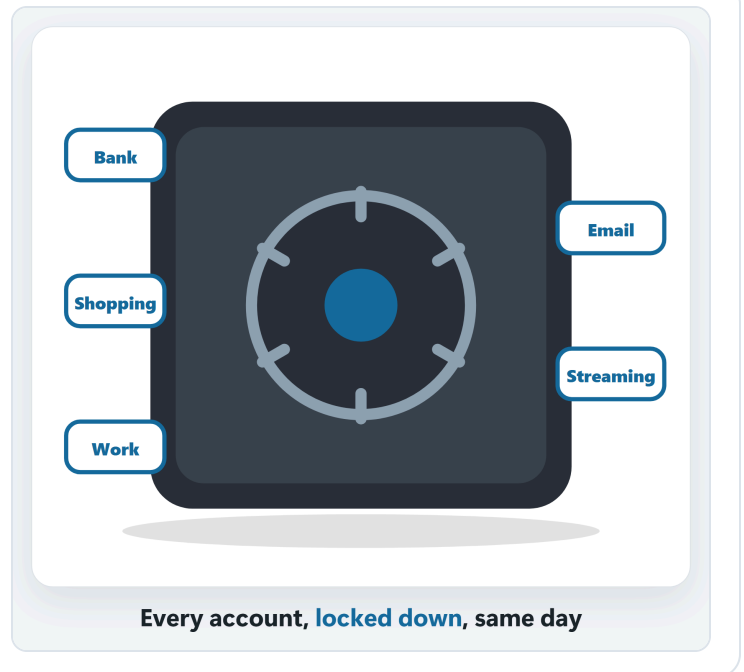


Access ends the same day

Disable their accounts, revoke access to shared files and apps, and change any shared passwords they knew.

WHAT TO DO

Collect company equipment, and forward or archive their email before the account is removed.



A few tips

- ☐ Use a checklist, every single time
So nothing depends on someone remembering
- ☐ Involuntary departure?
Cut off access before, or right at, the conversation, not after
- ☐ Review access quarterly
People change roles; their old access often doesn't get updated

Recap: onboarding & offboarding tech

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|---|--|
| ☐ Onboarding: accounts, computer, and access, ready before day one | ☐ Collect equipment, change shared passwords, archive email |
| ☐ Offboarding: access cut off the same day they leave | ☐ Use a checklist, and review access regularly |

For an involuntary departure, access should be cut off before, or right at, the conversation, not afterward; that's standard security practice, not something to feel awkward about.



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