

Onboarding and Offboarding Employees



IT onboarding is as important as HR onboarding when it comes to welcoming a new team member. No matter how technically qualified they are, they need an IT administrator to take them through the setup and get them productive as soon as possible. The same goes for offboarding as well. Be it revoking security access or setting up the mail forward, it should be done in a timely manner.

As we transition to a remote and hybrid work environment, there comes more challenges to onboarding and offboarding employees. To reduce time-waste and uncertainty, you need to ensure that you have the right processes and tools in place for systematic, secure and efficient onboarding/offboarding.

To help you implement the onboarding/offboarding processes the right way, we've come up with this checklist to help you organize proper IT onboarding for new employees and offboarding for leaving employees.

Employee Onboarding Checklist:

Effective IT onboarding can make new employees feel welcome in a new office. It can also boost efficiency by reducing the time wasted on redundant activities. The following steps are essential to ensure effective onboarding of new employees in remote and hybrid work environments.

Step 1: Gather Information

Coordinate with the hiring manager and HR to collect information to help prep the IT setup such as name, contact details, job titles, departments, starting date, etc

Determine which software, hardware, tools and access rights the employee needs, such as company email, internal messaging, productivity tools, analytics, spreadsheets, etc

Get the necessary approvals to set up new accounts

Invite the employee to join corporate accounts and send them setup guidelines

Pro-tip: Gather the required information well ahead of the employee's start date to ensure smooth onboarding on the first day.

Step 2: Hardware Delivery & Setup

List the IT hardware that employees require and identify the location of this hardware or order it in, if required

Set up an employee workstation or laptop including all required peripherals, such as keyboards and monitors

Ensure that the employee has access to a high-speed internet connection

Pro-tip: Prepare equipment delivery to arrive **before** the start date, if needed, for remote setup.

Step 3: Software Installation & Account Setup

Ensure all required software is installed and updated before the start

Provide access to all software and any cloud-based software systems your company uses

Create company user ID (username and password)

Access to network shares

Mail account and password

Email setup and best practices (mail signature)

Familiarize new user with the Global Address List and verify that their information is correct

Computer setup and configuration of mail client, if applicable

Telephone code and phone setup (voice mailbox), if applicable

Database(s) access, if applicable

Accounting system access, if applicable

Access to the intranet, banking websites, company website, social media sites, if applicable

Access to cloud storage, if applicable

Mail set up in mobile device/smartphone, if applicable

Pro-tip: If there are any industry-specific or company-specific software tools, ensure you provide the necessary training for using the tool during the onboarding.

Step 4: First Day Review

Ensure they understand and sign data privacy agreements

Provide training on how to secure their workstation, best practices and productivity tips

Explain how new employees should reach out if they have technical issues

Initial user ID password reset

Check to see if all software is properly installed

Pro-tip: Once the onboarding is done, provide your contact details and instruct them on how to reach you in case of IT issues or other doubts.

Employee Offboarding Checklist:

Offboarding is a critical task for IT teams of all sizes. A disgruntled employee with access to sensitive data even after being let go poses a high level of threat to network security. Apart from being quick, your offboarding should also follow a systematic process to reduce potential security risks. The following checklist can guide you to organize your offboarding process in remote and hybrid work environments.

Step 1: Assessment & Equipment Retrieval

Determine if the employee is high-risk, if so:

Immediately disable the employee's access to all systems

Remove all organizational data from employee-owned devices

Ensure the employee returns any company-owned equipment and assets

Compile a list of all locations where the employee stored data including cloud storage platforms

Pro-tip: Make a list of applications where the employee has access to critical data.

Step 2: Phone & Email Access

Ensure the employee's phone is not forwarded to any external numbers and change the voicemail password

Reset the password in your email system and disable the Active Directory ID

If the employee used a personal cell phone or tablet to access work email, wipe or remove the email account

Create an out-of-office message for emails in accordance with your organization's communication guidelines

Remove the employee from generic and specialized email distribution lists

Set up of mail forwarding, if applicable

Pro-tip: For employees dealing with customers, ensure you forward the critical emails to another person before disabling the account.

Step 3: Network & Cloud Access

Terminate VPN and review any remote access methods

Remove the employee from all access control security groups

Move any association files that may have been stored outside your primary file repositories to a central location

Revoke access to your corporate cloud storage accounts

Remove association files from any personal cloud storage accounts.

Pro-tip: Determine and grant access to anyone who will need access to the ex-employee's local and network files.

Step 4: Personnel

Review your password database logs to determine which passwords were accessed by the employee.

Reclaim employee licenses

Require related staff to change their passwords if there is any risk of shared passwords

Contact vendors the terminated employee managed or worked with to alert them of the employee's departure and provide a new contact

Remove the ex-employee from the authorized list of contacts

Remove or change credentials (usernames/passwords)

Pro-tip: Check if there are any vendor licenses assigned to the employee. You don't want to be paying for the licenses even after the employee's exit.

While this list is not exhaustive, it could give you the much-needed framework when it comes to onboarding or offboarding employees in a remote and hybrid environment. Most importantly, you need the right tools that can make the process quicker and simpler through automation.

For instance, IT Glue's smart documentation can help you collaborate with other teams and widely share SOPs, checklists and other critical information across multiple departments. Make sure you use the right technological tools that can assist you with streamlining the onboarding/offboarding process in your company.

To know more about how the right tools and documentation process can help you with employee onboarding and offboarding, tune in to our webinar.

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To see how IT Glue can help you with employee onboarding and offboarding, request a demo.

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