FIRST DAY. LAST DAY. NOTHING MISSED.

Accounts matter most on two days: the day someone starts, and the day someone leaves. Here's the IT side of both, in order, for whoever does the paperwork.

NAME _____ ROLE _____ MANAGER _____

Print one for each person. The first half is for the day they join, and the second is for the day they leave.

BEFORE THEY START

A week's notice makes the first morning easy.

- [ ] **IT knows they're coming.** Their name, the day they start, their role, and whose access to copy.
- [ ] **They have an account, a mailbox, and the right license.**
- [ ] **They're in the groups their job needs, and no others.** Shared mailboxes, shared folders, and calendars.
- [ ] **A computer is ready for them.** Wiped if someone had it before, up to date, encrypted, and set up with what they'll use.
- [ ] **They have a phone extension and a voicemail box.** If the job needs one.
- [ ] **The other systems know about them.** Accounting, the CRM, scheduling, and the door.

ON THE FIRST DAY

Sit with them for this part. It's when good habits are cheapest.

- [ ] **They sign in and choose a password of their own.** Nobody else knows it, you included.
- [ ] **Multi-factor sign-in is set up, with them in the room.**
- [ ] **Their password manager is set up.** And they've saved their first password in it.
- [ ] **Email, calendar, shared files, and the printer all work.**
- [ ] **They know how to get IT help.** The number, the email address, and who to ask in the office.
- [ ] **They've read and signed the policies.** Acceptable use, and the rules for AI tools. The AI policy template is free.

IN THE FIRST WEEK

Then check it once, while it's still fresh.

- [ ] **Security training has been assigned, and they've started it.**
- [ ] **They know what a phishing email looks like, and who to tell.** Four signs an email is working on you takes a minute to read.
- [ ] **Their access has been checked.** They can reach what they need, and what they don't need has been taken away.
- [ ] **What they were given is written down.** Laptop, phone, keys, and door fob.

WHEN SOMEONE GIVES NOTICE

Start the day you find out, even if the last day is weeks away.

- [ ] **IT knows the last day.**
- [ ] **Someone is named to take over their work.** Their open jobs, their clients, and their files.
- [ ] **You've decided what happens to their mailbox.** Who reads new mail, what the automatic reply says, and for how long.
- [ ] **You've listed what they hold.** Equipment, keys, a company card, and any account only they know the password to.
- [ ] **Work kept on their own computer or in a personal account has been moved.** Into shared storage, while they're still here to ask.

ON THE LAST DAY

Letting someone go? Do this part while the conversation is happening, not after it.

- [ ] **Their sign-in is blocked, and their open sessions are ended.**
- [ ] **Their password is reset, and their multi-factor methods are removed.**
- [ ] **Their mail goes where you decided.** And the automatic reply is on.
- [ ] **They're out of every group, shared mailbox, and mailing list.**
- [ ] **Work email and files are off their personal phone.**
- [ ] **Remote access is closed.** The VPN, and any remote-control tool.
- [ ] **The other systems are closed too.** Accounting, the CRM, the bank, payroll, and supplier websites.
- [ ] **Passwords they shared in are changed.** Wi-Fi, the alarm, social media, and any shared sign-in.
- [ ] **Everything on your list has come back.** Laptop, charger, phone, keys, fob, and card.

IN THE WEEKS AFTER

The loose ends. Easy to forget, and cheap to tie off.

- [ ] **Their files are where the people who need them can reach them.**
- [ ] **Their license is freed.** So you're not paying for an empty seat.
- [ ] **Their computer is wiped before anyone else gets it.**
- [ ] **Their phone extension is reassigned.** And the voicemail greeting is changed.
- [ ] **Anything registered in their name has a new owner.** Subscriptions, web addresses, and supplier accounts.
- [ ] **Their account is deleted only once nothing more is needed from it.** Check what your backup keeps first.

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