[Company name]

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User Account Setup Checklist

Everything IT must have ready before a new user starts, confirmed on day one, and checked again in week one.

1. New user details: Full name of the new user: _____ **Job title of the new user:** _____

Department of the new user: _____ **Manager of the new user:** _____

Start date of the new user: _____ **Work location of the new user:** _____

Person setting up this account: _____

2. Before the start date: [ ] The new user's identity and employment details have been confirmed with the hiring manager before any account was created.

[ ] A username has been created following the organisation's naming convention, and it does not duplicate an existing or former user's name.

[ ] An email account has been created and tested by sending and receiving a test message.

[ ] Access groups have been assigned based on the new user's role, at the lowest level that role requires, and the assignment has been approved by the manager.

[ ] Access to shared folders, drives, and team resources needed for the role has been granted and noted for day-one testing.

[ ] Any role-specific software licences have been assigned, and licence availability has been confirmed so the start is not delayed.

3. Device and workplace setup: [ ] A workstation or device has been prepared, updated, and tested, including keyboard, screen, and network connection.

[ ] Required software has been installed and updated on the device, and each application has been opened once to confirm it launches.

[ ] Security software is installed, up to date, and reporting correctly, and device encryption is switched on where required.

[ ] Printers, scanners, and any other peripherals the role needs have been connected and tested.

[ ] Remote access has been set up and tested where the role requires working away from the office.

4. Security setup: [ ] A temporary sign-in method has been issued securely, and the new user has been told they must change it at first sign-in.

[ ] Multi-factor authentication has been set up for the systems that require it, and the new user has completed enrolment or has a booked enrolment step.

[ ] The new user has been told never to share credentials, and where to report a suspected compromise.

[ ] Screen lock and device security settings have been applied and confirmed on the issued device.

5. Day one: confirm with the new user: [ ] The new user has signed in to email, the network, and each role system, and each sign-in has been confirmed working.

[ ] The new user can reach shared folders, team resources, and communication tools, and has been added to the right groups and channels.

[ ] The new user's contact details appear correctly in the directory, so colleagues can find them.

[ ] The new user knows how to contact IT support, including what information to include when reporting a problem.

[ ] The new user has received the acceptable use and security policies, and their acknowledgement is recorded.

6. First-week follow-up: [ ] Any access that was missing on day one has now been granted, and the reason for the delay is recorded.

[ ] Any software or device problem reported in the first week has been resolved or has an owner and a date.

[ ] Temporary credentials and setup shortcuts have been removed or replaced with the new user's own credentials.

[ ] The manager has confirmed the new user has everything needed for the role, or has listed what is still outstanding.

7. Sign-off By signing, IT confirms the account, device, and access above were set up and tested as recorded, and any outstanding item has an owner and a date.

IT setup person name: _____ **Manager name:** _____

IT setup person signature: _____ **Manager signature:** _____

Date of sign-off: _____