

New Hire IT Setup Checklist

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Use this checklist for every new employee so nothing gets missed on day one. Start at least one week before the start date.

Employee name: _____ Start date: _____

Role / department: _____ Manager: _____

Before the start date (1 week out)

- Order or assign a computer (confirm specs fit the role)
- Order monitor(s), dock, keyboard, mouse, headset as needed
- Create email account and assign license (Microsoft 365 / Google Workspace)
- Add to the correct email groups and shared mailboxes
- Create accounts in business applications (list them below)
- Set up phone extension / softphone and add to call groups
- Assign door access badge / code (if access control is used)
- Add to password manager and share only the vaults they need

Applications this role needs

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Day one

- Computer set up at their desk, signed in, and updated

- Email working on computer and phone
- Multi-factor authentication (MFA) enrolled - do not skip this
- Connected to the correct Wi-Fi network (staff, not guest)
- Printer(s) installed and test page printed
- Phone extension tested - inbound and outbound
- File access verified (shared drives / SharePoint / OneDrive)
- Door access tested

First week

- Security basics covered: phishing awareness, password rules, who to call
- Confirm all application access works (no lingering permission requests)
- Remove any temporary passwords; confirm everything is in the password manager
- Add employee to the IT asset inventory (device serial, assigned date)

Notes

Completed by: _____ Date: _____

Tip: The reverse of this process matters just as much. When someone leaves, their access should be removed the same day. Ask us about our Employee Offboarding checklist.