[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	[Full name of the new user]
Job title of the new user	[Job title of the new user]
Department of the new user	[Department of the new user]
Manager of the new user	[Full name of the manager of the new user]
Start date of the new user	[Start date of the new user]
Work location of the new user	[Work location of the new user]
Person setting up this account	[Full name of the 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	[Full name of the it setup person]
Manager name	[Full name of the manager]
IT setup person signature	[Signature of the it setup person]
Manager signature	[Signature of the manager]
Date of sign-off	[Date of sign-off]