

Small business IT | Easy | 2 min read

IT checklist for a new starter and a leaver

People joining and leaving are the moments when IT mistakes happen. A short checklist keeps your business tidy and secure.

Before a new starter arrives

1. Create their **own named accounts** for email and any systems. Never share logins.
2. Give them access only to what their job needs.
3. Set up two-step sign-in on every account.
4. Prepare their computer: updates installed, security software on, drive encrypted, standard (non-admin) user account.
5. Decide who is the person they ask if something goes wrong.

On day one

- Show them how to use a password manager.
- Spend ten minutes on spotting scam emails and what to do if they click something.
- Explain how to save files in the shared area and not only on their desktop.
- Have them read your simple rules on personal devices, USB sticks and Wi-Fi.
- Record the equipment you handed over in your equipment list.

When someone leaves

1. Agree the date and time access will end, and do it on time.
2. **Disable the accounts** rather than deleting straight away, so you can retrieve their mail and files.
3. Change shared passwords they knew, such as the Wi-Fi or social media logins.
4. Remove them from shared folders, mailing lists, cloud tools and payment or banking systems.
5. Collect laptops, phones, keys, cards and tokens.
6. Move their files and email to a colleague, and set an out-of-office or forward for a time.
7. Remove business accounts from any personal phone they used.

Keep a record

Write down the date each step was done. A one-page form, filled in each time, is enough.

When to get more help

Ask for help if you are not sure which systems a person had access to, if someone leaves on bad terms, if you suspect they took data, or if you have no list of your accounts. We can help you build the checklist and tidy access.

Still stuck? Email admin@visiontech336.com and tell us what you can see on the screen. Menus and button names can differ slightly between versions and makes. If something does not match, stop and ask rather than guess. Please never send passwords or card details.