In both on-boarding and off-boarding employees, it is critical to engage your IT team or Managed IT Service Provider as early as possible to ensure a smooth transition and secure company data and information. In consultation with your IT team or IT provider, prepare a checklist for your company with room to add steps that may be different or additional for employees.

A few items to consider and have in place *before* your employee's first day:

- Where will the new employee be working? Will they have a new desk and location or using an established desk?
- Is their location appropriately set up for their equipment? Is there power, phone or network cabling easily accessible?
- What computer will they be using? Will they be reusing a previous employee's system or are you purchasing a new system?
- Is there additional equipment they need to be successful? New keyboard, mouse, webcam, external speakers, phone headset, etc.
- Will the employee have a dedicated or shared phone?

On-Boarding Employee(s)

Computer	
What accounts are needed?	
What programs are needed?	
What access does that employee need (data, software, etc.)?	
Do you have passwords for: email, software subscriptions (Adobe, Office, etc.)?	
Provide the licensing keys for software (i.e., QuickBooks).	
Is there support for Line of Business (LOB) software, if needed?	
Will they be working remotely?	
Are there any new or unique programs or software that this employee will need that needs to be purchased and installed?	
Email	
Assign and set-up their email address.	
Is there a requested password wanted?	
Any access to shared mailboxes needed?	
Do they need contacts shared with them?	
Business Phone	
Does an extension need to be renamed?	
Does the voicemail need to be reset or cleared?	
Does unified message (UM) need to be updated?	
Are their programming changes that need to be updated? (i.e., ring groups, auto attendant options)?	

On-Boarding Employee(s) *(Continued)*

Network	
Will they need access to your network?	
What type of access to your network will they need?	
Will they be working remotely?	
What type of network security will they require?	

Off-Boarding Employee(s)

Computer	
Change all passwords associated with the employee for any associated programs.	
Backup any needed files or programs associated with the employee's computer or work.	
Will you be reusing the computer for another employee?	
Email	
Change their password to restrict access from any account login (i.e., desktop and mobile).	
Do you need to retain their email? If so, for how long and who needs access to?	
Do you want the email inbox to be forwarded to another employee?	
Do you have an auto reply message that needs to be set up?	
Business Phone	
Does the extension need to be renamed?	
Does the voicemail need to be reset or cleared?	
Does unified message (UM) need to be removed?	
Are their programming changes that need to be updated (i.e., ring groups, auto attendant options)?	
Network	
Ensure they do not have remote access to the network, especially if they worked remotely at any point in time.	
Change any network passwords associated with their network access.	

If you have questions, reach out to our team.

Phones/VoIP • Networks • PC Support • Secure Backup

970.242.8142 • info@commwestcorp.com

www.commwestcorp.com

CommWest

Your Communications • Our Business