



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 or assign peripherals - 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
- ☐ Confirm remote access needs (VPN / remote desktop) if this role requires it

Applications and software needed on this machine

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 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
- ☐ Computer connected to the internal network via ethernet or staff Wi-Fi
- ☐ Personal phone connected to guest Wi-Fi only - not the internal network
- ☐ Printer(s) installed and test page printed
- ☐ Phone extension tested - inbound and outbound
- ☐ File access verified - shared drives / SharePoint / OneDrive / Google Drive, whichever the business uses
- ☐ 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.