

A new starter. A clear IT plan.

A quick guide to using your free editable checklist.

1. **Save a fresh copy for each starter.** Open the Excel workbook and use the Checklist sheet. Add a starter reference, start date and manager. The Example sheet shows a completed fictional setup.
2. **Agree the work before creating accounts.** Ask the manager to approve the applications, files and shared mailboxes needed for the role. Assign an owner and due date to each task.
3. **Work through the three stages.** Prepare equipment and approved access before arrival. Test the actual working setup with the starter on day one. Review issues and access in the first week.
4. **Record what happened.** Choose a status and add brief evidence when a task is done. If waiting, record what is needed and who will act. Explain anything marked Not applicable.
5. **Review before handing over.** Check sign-in, MFA, email, required apps, shared resources and the support contact. A completed count alone does not confirm readiness.

Keep passwords out of the checklist.

Do not record passwords, recovery codes or identity documents. Keep the completed file in a restricted company location and use your approved secure process for account setup.

What to do when something is not ready

Give each open item an owner, next action and due date. Agree with the manager whether the starter can work safely while it is resolved. Do not mark a blocked task Done just to finish the list.

Want help getting the setup done?

hostme.ie helps with business accounts, equipment and practical IT support.

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