



ARDENT WORKSHOP

A FREE ARDENT WORKSHOP STARTER

Onboarding & Offboarding Checklist

One person, every system, what to hand over first

Free · one tab · no signup

Hand over before you revoke

Disabling an account is the easy half of an offboarding. It does not move what that person owned — a shared drive, a shared calendar, a distribution list, an admin seat, a recovery contact, or a key or integration created under their login. Turn the account off first and those stay exactly where they were, owned by nobody, and getting one back afterward ranges from a support ticket to impossible. This checklist puts the two steps in the order that actually protects you: hand over, then revoke.

For one leaver, work in this order

- 1 Fill in their name and role at the top of the Checklist tab, set **Joining or leaving?** to **Leaving**, and put their last day in **Effective date**.
- 2 Work every row marked **Hand over first? Yes** before anything else — reassign the shared drive, the calendar, the distribution list, the admin seat, whatever it is, to somebody who is staying.
- 3 Mark **Grant or revoke** as **Revoke** for every system they had, and only then turn the account off. Date the **Done** column as you close each row.
- 4 Collect the equipment — laptop, asset tag, and anything else issued — and mark it **Returned** the day it actually comes back, not the day you asked for it.

For one joiner, work in this order

- 1 Fill in their name and role, set **Joining or leaving?** to **Joining**, and put their first day in **Effective date**.
- 2 Mark **Grant or revoke** as **Grant** for every system their role needs, and set up the Critical-sensitivity ones first so they can actually start work.
- 3 Issue their equipment and note the asset tag as you hand each item over.
- 4 Mark **Done** against each row only once it is genuinely set up — an empty cell is the honest state, not a guess.

WHAT THIS FREE CHECKLIST DOESN'T DO

This checklist runs ONE person, by hand. It does not score an access item by sensitivity weight × days open, does not rank anything into a queue, does not diff a mover's old role against a new one through a Role Access Matrix, and does not total what unrecovered equipment or an unrevoked license is actually costing you. That is the full Onboarding & Offboarding Equipment & Access Tracker's job — it runs everyone at once and tells you what to close first.

Running more than one person?

One person at a time, worked by hand, is honest work — right up until you have three people moving in one month and no way to tell which of forty open rows to deal with first.

WHAT THE FULL WORKBOOK ADDS

The full **Onboarding & Offboarding Equipment & Access Tracker** runs your whole roster at once. Every open access item scores its system's sensitivity weight × days open into a ranked **"close this first" queue**, a Role Access Matrix and Action Builder compute the exact **grant / revoke / hand-over list** for a mover changing role — the case a single-person checklist rarely covers — and a Dashboard totals what unrecovered equipment and unrevoked licenses are genuinely costing you. Eight tabs for Excel, Google Sheets and LibreOffice, plus a 46-system catalog, two guides and three printable forms. [Get the full Onboarding & Offboarding Equipment & Access Tracker >](#)

See the full range at ardentworkshop.com.

Not advice. This checklist and this guide organize an access and asset process. They are not security, IT, HR, legal, or compliance advice, and the checklist deliberately stores no passwords, keys, or recovery codes — keep those in a password manager. The equipment items and asset tags in the checklist are fictitious sample data, and the person block ships blank. Once a real employee is in it the file maps one person's access, so keep it restricted and archive or delete it once the move is done.

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