Microsoft 365 License Assignment SOP

Purpose

To define a standardized procedure for assigning Microsoft 365 licenses (Basic, Standard, Premium) based on job function, operational needs, and data security access levels. This ensures appropriate access to Microsoft cloud services while optimizing license usage, maintaining compliance, and supporting role-based productivity.

1. License Types and Definitions

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| Basic | Web-based Office apps only. No desktop installations. Used for low-complexity access needs. |
| Standard | Includes full desktop Office apps, email hosting, and OneDrive. No Intune or advanced security. |
| Premium | Includes everything in Standard, plus Microsoft Intune, Defender, and advanced security/compliance tools. |

1. License Assignment Policy

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| Basic | Contractors, interns, program and department accounts, third parties, volunteers |
| Standard | Administrators, assistants, community health workers, consultants, designers, developers, program analysts, support staff, writers |
| Premium | Coordinators, data analysts, department heads, directors, executive assistants, managers, specialists, supervisors |

NOTES: Any exceptions to this policy must be approved by IT Lead.

1. Procedure
2. Upon onboarding notification from HR, determine license type to be assigned.
3. Log into Microsoft 365 Admin Center and navigate to **Users > Active Users** and click **Add a user** or select an existing user.
4. Under **Product Licenses**, assign the appropriate Microsoft 365 Business license.
5. Confirm access to the correct services.
   1. For Premium licenses, ensure device enrollment in Intune, MFA enforcement, and security baselines applied.
6. Conduct quarterly reviews of license allocations to ensure alignment with current job roles and usage.
   1. Reassign or downgrade licenses for users who change roles, no longer require advanced tools, or have left the organization.

This SOP must be reviewed annually.