New Hire Device and Account Provisioning SOP

Purpose

To define the internal process for provisioning accounts and devices for new hires. This SOP ensures that IT onboarding tasks are executed consistently, securely, and in a timely manner. Applies to all IT staff responsible for new hire onboarding.

1. Upon notification of new hire, create a ticket in the internal ticketing system with the new hire’s full name, job title, department, start date, and supervisor.
2. Create a new user in the Microsoft 365 Admin Center.
3. Assign appropriate licenses.
4. Add user to relevant distribution lists and security groups.
5. Set a temporary password and enable “require password change on next login”.
6. Configure access to additional SaaS platforms, such as InvGate, Zoom, or Adobe, based on the employee’s role.
7. Add to SSO and Entra ID groups for authentication.
8. Enable MFA and verify it’s enforced across systems.
9. Check inventory for an available device or submit procurement request per the IT Procurement SOP.
10. Log device in inventory system with asset tag, serial number, and assigned user details per the Asset Management and Inventory Tracking SOP.
11. Setup device using the Device Setup and Configuration SOP:

* OS installation and updates
* Software installation
* Printer and peripheral setup
* BitLocker or FileVault encryption
* InvGate agent installation
* VPN configuration for remote workers (if applicable)

1. Validate system compliance and network connectivity.
2. Log all actions in the internal ticketing system and attach device setup checklist.
3. Update inventory record with assigned employee name, department, device asset tag and serial number, and setup date and technician name.
4. Ensure Device Receipt Acknowledgment Form is signed and stored digitally.
5. If employee is remote, securely ship device and provide tracking information to HR.
6. Provide employee supervisor with summary of accounts and devices provisioned.
7. Ensure supervisor or department provides orientation to new hire; IT doesn’t directly onboard the employee.
8. Verify successful login and access to core systems within 24 hours of start date.
9. Provide Tier 1 support if login or connectivity issues arise.
10. Document any issues and resolution steps in the ticket.

This SOP should be reviewed annually or after changes to onboarding platforms, license management systems, or device setup procedures.