

MICROSOFT 365 EMPLOYEE OFFBOARDING CHECKLIST



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1. Step 1: Disable the User

- ☐ Disable the user account in (if) on-premises Active Directory or Azure AD
- ☐ Ensure the disabled user is moved to appropriate OU that syncs to cloud
- ☐ Verify account sync to Microsoft Entra ID (Azure AD) shows as blocked
- ☐ Confirm the account appears as disabled in Microsoft 365 admin center

2. Step 2: Reset User Password

- ☐ Reset password in on-premises Active Directory
- ☐ Verify password sync to cloud via Microsoft Entra Connect
- ☐ Document new password securely if needed for transition period

3. Step 3: Transfer Email Aliases

- ☐ Identify all email aliases associated with the user
- ☐ Determine which aliases need to be transferred to other mailboxes
- ☐ Move necessary aliases to appropriate replacement mailboxes
- ☐ Remove or retain unused aliases as needed

4. Step 4: Remove User from Groups

- ☐ Remove user from all on-premises Active Directory groups
- ☐ Remove user from Microsoft 365 groups in the cloud
- ☐ Verify removal from distribution lists
- ☐ Check and remove from security groups
- ☐ Document group memberships for reference

5. Step 5: Force Sign-out from All Sessions

- ☐ Log out user from all on-premises AD sessions
- ☐ Force sign-out from all Microsoft 365 sessions
- ☐ Use PowerShell if necessary for comprehensive session termination
- ☐ Verify user cannot access any services

6. Step 6: Convert Mailbox to Shared Mailbox

- ☐ Check current mailbox size (note if over 50 GB)
- ☐ Convert user mailbox to shared mailbox using Exchange
- ☐ Management Shell (for hybrid environments)
- ☐ Wait for Microsoft Entra Connect sync to complete
- ☐ Verify mailbox appears as shared in Microsoft 365 admin center
- ☐ If mailbox >50 GB, consider purchasing Exchange Online Plan 2 license

7. Step 7: Remove Mailbox Delegations

- ☐ Review current mailbox delegations and permissions
- ☐ Remove unnecessary delegations
- ☐ Keep only required access for authorized personnel
- ☐ Document remaining delegations and their purpose

8. Step 8: Hide Mailbox from Global Address List

- ☐ Hide the mailbox from GAL in Exchange admin center
- ☐ Verify mailbox no longer appears in address book searches
- ☐ Confirm change has propagated across the organization

9. Step 9: Set Up Email Forwarding (if required)

- ☐ Determine if email forwarding is needed
- ☐ If external forwarding required, enable external forwarding for specific group first
- ☐ Configure email forwarding using Microsoft 365 admin center
- ☐ Send test email to verify forwarding works correctly
- ☐ Document forwarding destination and duration

10. Step 10: Export PST File (if required)

- ☐ Determine if mailbox data needs to be preserved offline
- ☐ Export mailbox to PST file using appropriate tools
- ☐ Store PST file in secure, approved location
- ☐ Document PST file location and access procedures

11. Step 11: Remove License

- ☐ Verify mailbox conversion is complete
- ☐ Confirm mailbox size (must be under 50 GB for license removal)
- ☐ Remove Microsoft 365 license from user account
- ☐ Verify no services are disrupted by license removal

12. Step 12: Delete User Account (Optional)

- ☐ Confirm all data preservation requirements are met
- ☐ Verify all necessary transfers and exports are complete
- ☐ Delete user account from Microsoft 365 (if organizational policy allows)
- ☐ Clean up on-premises AD account according to retention policies

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13. Final Verification

- ☐ Confirm user cannot access any Microsoft 365 services
- ☐ Verify email forwarding is working (if configured)
- ☐ Test that authorized users can access shared mailbox

DOCUMENT THE COMPLETION OF OFFBOARDING PROCESS

Update asset inventory and access management systems

NOTES SECTION

Date Completed: _____

Completed By: _____

SPECIAL CONSIDERATIONS:

- ☐ Mailbox over 50 GB (requires Exchange Online Plan 2 license)
- ☐ External email forwarding enabled
- ☐ PST export completed
- ☐ Special delegation requirements
- ☐ Email forwarded to who: _____
- ☐ Computer reassigned to who: _____

Additional Comments:
