Microsoft 365 Offboarding Checklist

A step-by-step list for removing a leaver safely, without losing data or paying for licences you no longer need.

How to use it: agree the leaving date, data owner and mailbox plan with the client before the last day, then work through each step and record who did it and when.

Before the last day

CHECK	STATUS	NOTES
Confirm the leaving date and time with the client	☐ Pass ☐ Gap ☐ N/A	
Agree who takes over email, files and shared responsibilities	☐ Pass ☐ Gap ☐ N/A	
List devices, accounts and third-party apps the user has Include admin roles and app ownership.	☐ Pass ☐ Gap ☐ N/A	

On the last day

CHECK	STATUS	NOTES
Block sign-in Entra admin centre or Microsoft 365 admin centre.	☐ Pass ☐ Gap ☐ N/A	
Reset the password	☐ Pass ☐ Gap ☐ N/A	
Revoke active sessions so existing logins stop working	☐ Pass ☐ Gap ☐ N/A	
Remove MFA methods and registered devices	☐ Pass ☐ Gap ☐ N/A	
Remove admin roles, group memberships and app ownership	☐ Pass ☐ Gap ☐ N/A	
Set an automatic reply if the client wants one	☐ Pass ☐ Gap ☐ N/A	

Data and mailbox

CHECK	STATUS	NOTES
Convert the mailbox to a shared mailbox, or set forwarding, as agreed A shared mailbox under 50 GB does not need a licence.	☐ Pass ☐ Gap ☐ N/A	
Give the new owner access to the user's OneDrive files Deleted users' OneDrive is kept for 30 days by default.	☐ Pass ☐ Gap ☐ N/A	
Transfer ownership of Teams, groups and shared files	☐ Pass ☐ Gap ☐ N/A	
Review apps the user consented to	☐ Pass ☐ Gap ☐ N/A	

Devices and billing

CHECK	STATUS	NOTES
Recover company devices and wipe or retire them	☐ Pass ☐ Gap ☐ N/A	
Remove licences once data is secured Then reassign or reduce the licence count.	☐ Pass ☐ Gap ☐ N/A	
Update the PSA contract and RMM records Stop billing seats and devices that are gone.	☐ Pass ☐ Gap ☐ N/A	
Record what was done, by whom and when	☐ Pass ☐ Gap ☐ N/A	

Run these checks in minutes. MSPSnaps reads Microsoft 365, Autotask and NinjaOne read-only and turns the gaps into branded client reports with projects to quote. Start free at mspsnaps.com.

General guidance only. Follow the client's own data retention and legal requirements, and confirm steps against current Microsoft documentation.