



**J3 Systems Group Quick Resource**

# **Microsoft 365 Security Checklist**

A quick checklist for reviewing common Microsoft 365 security settings.

**Practical guidance for small businesses and nonprofit organizations**

Prepared by J3 Systems Group LLC

## Overview

Microsoft 365 gives small businesses powerful tools for email, files, identity, and collaboration. This checklist helps leadership review common security areas that are often missed during daily operations.

## Who This Is For

- Business owners who rely on Microsoft 365 for email and files.
- Office managers who help coordinate user access and licenses.
- Small teams that want a simple monthly security review.

## Security Checklist

Check	Review area	What to confirm
<input type="checkbox"/>	<b>MFA review</b>	Confirm MFA is required for all users, especially administrators and remote workers.
<input type="checkbox"/>	<b>Admin accounts</b>	Limit administrator roles to the fewest people needed and avoid using admin accounts for daily work.
<input type="checkbox"/>	<b>Conditional access</b>	Review sign in rules for location, device status, risky activity, and sensitive applications.
<input type="checkbox"/>	<b>Mailbox forwarding</b>	Check for unexpected forwarding rules, especially rules that send mail to outside addresses.
<input type="checkbox"/>	<b>Microsoft Defender</b>	Review quarantine, threat alerts, safe links, safe attachments, and reported phishing messages.
<input type="checkbox"/>	<b>Shared mailboxes</b>	Confirm shared mailbox access is still needed and remove former employees or unused members.
<input type="checkbox"/>	<b>Inactive users</b>	Disable or remove users who no longer work with the organization.
<input type="checkbox"/>	<b>External sharing</b>	Review OneDrive and SharePoint sharing to confirm sensitive files are not open to the wrong people.
<input type="checkbox"/>	<b>License review</b>	Remove unused licenses and confirm security features match business needs.
<input type="checkbox"/>	<b>Security alerts</b>	Confirm someone is assigned to review alerts and document follow up actions.

## When To Ask For Help

Ask for help when admin roles are unclear, business data is spread across personal accounts, access removal depends on memory, security alerts are not being reviewed, or the organization is not sure which settings are currently protecting users and files.

### Quick Review

- All users have MFA enabled.
- Admin access is limited and documented.
- No unexpected forwarding rules are present.

- Inactive users are disabled.
- Security alerts have an owner.

## Conclusion

A quick review can reduce avoidable risk and help prevent account compromise, data exposure, and unnecessary license cost.

### **Need help reviewing your Microsoft 365, Google Workspace, offboarding, or small business IT security setup?**

J3 Systems Group LLC provides practical IT support, documentation, cloud administration, and security focused reviews for small businesses and nonprofit organizations.

**Contact J3 Systems Group LLC to request a practical review and clear next steps.**