

Onboarding Leader Guide and Checklist



Introduction

This resource helps hiring managers navigate the onboarding process and provides a starting point to build a custom onboarding plan. The tasks and resources are foundational and apply to employees across the institution. Hiring managers are responsible for reviewing, editing, and adding to the document prior to sharing with their new employees. New employees will be introduced to this resource during orientation and will be asked to review with their people leader.

Step 1 Save this document to your desktop or secure folder, including the employee's name and start date in the document title (e.g., Onboarding Plan - J.Doe 6.7.23).

Step 2 Upon verbal offer acceptance, begin completing tasks listed under the **Following Offer Acceptance** section by updating the status as tasks are completed.

Step 3 Finalize the [Onboarding Plan for New Hires](#) prior to the new employee's start date and complete the following.

- Add **Employee Information** so your new employee has key information readily accessible.
- In **Section 1** of the [Onboarding Plan for New Hires](#), identify and review tasks that are specific to your employee's role or department. Decide on the best ways to help them complete these tasks.
- In **Section 2** of the [Onboarding Plan for New Hires](#), list the names, titles, topics to discuss, and deadlines for role, team, or department specific meetings the new employee should complete

Step 4 During your first one-on-one (*either after 4PM on the new employee's start date or the following morning*), email the onboarding plan to review together, focusing on week 1 tasks, what to expect, and who to contact with questions.

Step 5 Have weekly progress check ins:

- For completed tasks, discuss key takeaways, and address any questions/concerns.
- For incomplete tasks, agree to next steps and timeline.
- Identify and resolve any roadblocks

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Leader Accountability in Onboarding

- ✓ I am accountable for the onboarding experience and recognize the importance this plays in building trust with my new team member.
- ✓ I recognize HR and IT are my partners in onboarding; I will seek to understand the support they provide and will share feedback to improve the onboarding experience.
- ✓ I value and embody a self-service culture, proactively seeking resources that support the onboarding experience and encouraging others to do the same.
- ✓ I want my new hire to succeed; I will guide them by setting clear expectations and communicating openly, honestly, and frequently.

Onboarding Element	Instructions	Supporting Resource	For Questions, Contact...	Status
At Offer Acceptance				
IT Processes begins once HR processes new hire in HR System	Upon completion of background check form, HR processes hire in HR Systems, initiates EAM IT processes.	N/A	HR	
HR Works with Hiring Manager to complete EAM	HR completes EAM in banner noting office location and technology needs, request systems access, etc. as identified by hiring manager. IT deploys technology (computer, phone, etc.)	N/A	IT	
HR sends link and instructions to new hire for login to portal, to complete new hire paperwork	New Hire completes all new hire paperwork (I9, W2, Direct Deposit)	IT Letter NEW EMPLOYEE ONBOARDING Page on INTRANET		
HR schedules NEO	HR contacts new hire to share details for NEO		HR	

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Onboarding Element	Instructions	Supporting Resource	For Questions, Contact...	Status
Week of/Following Offer Accept				
Customize Onboarding Plan	Leader to review the NEW HIRE ONBOARDING template provided and add, edit, or remove, tasks that align with your new employee's onboarding needs. Consider topics, tools, and resources at the team, departmental, and divisional level.	ONBOARDING PLAN TEMPLATE	Leader	
Select and Engage an Onboarding Buddy	Identify a potential Onboarding Buddy, Discuss the opportunity, and time commitment; engage the buddy early to build a relationship and maximize support for the new hire.	ONBOARDING BUDDY GUIDE	Leader	
Review the New Employee Orientation Agenda	Understand the information given to your new employee during New Employee Orientation (NEO) including: <ul style="list-style-type: none"> Organizational overview Employee benefits 	NEW EMPLOYEE ONBOARDING Agenda	HR	
Week Prior to Start				
Confirm College, Department and Team Training	Identify and schedule departmental and team training needs.		Leader	
Finalize Onboarding Plan Template	Identify tasks.	ONBOARDING PLAN TEMPLATE	Leader	
Connect with new employee prior to NEO	Important: Email, Text or call the new employee to: <ul style="list-style-type: none"> Answer any final questions. Confirm date/time of first one-on-one (morning of Day 2) and where to report on Day 2. Review what to expect Day 1		Leader	

Onboarding Checklist for Leaders

Onboarding Element	Instructions	Supporting Resource	For Questions, Contact...	Status
Review Onboarding Plan with Onboarding Buddy	Schedule a 30–60-minute meeting with onboarding buddy to review the tasks delegated in the onboarding plan and address questions/concerns.	ONBOARDING BUDDY GUIDE	Leader	
Schedule Initial One-on-Ones on calendar	<ul style="list-style-type: none"> ○ Purpose, structure, and goals of team or department ○ Recent team news, changes, or milestones ○ Roles and responsibilities ○ Basic expectations (work hours, dress code, time off) ○ Week 1 schedule, meeting routines, and expectations 	N/A	Leader	
Share New Hire Onboarding Plan	Within first couple of days of employee joining the team, review New Hire Onboarding Plan		Leader	