Comprehensive Onboarding Checklist and Onboarding Plan Template for Managers
The checklist serves as a task-completion tool to ensure all required forms, access, and setup steps are completed. The onboarding plan, by contrast, provides a structured, time-phased framework that guides you on when and how to deliver onboarding activities in a way that supports engagement, role clarity, relationship-building, and performance success. Used together, the checklist ensures operational compliance, while the onboarding plan ensures a high-quality onboarding experience for the employee.

1. Before the First Day (Preboarding)
Tip: <mark>Four in five workers say they'd stay longer in a role with a better onboarding process.</mark>

- ☐ Create the Onboarding Plan, template below (usually done by the direct supervisor)
- ☐ Review your onboarding tasks in the Page Up Onboarding Portal - You can also review your new hire's tasks - User guide
- ☐ Designate the person or people responsible for the onboarding plan (This can be different people depending on the associated tasks)
- ☐ Identify and select a Team Representative (Peer Advisor) to aid in acclimation
- ☐ Inform existing staff about the new hire's background and start date. Templates can be found in your Page Up Onboarding portal
- ☐ Select and enroll the new employee in appropriate training via the Learning Library or LTS website (e.g., Banner access, software).
- ☐ Prepare the office space, desk, and any necessary supplies
- ☐ Submit a facilities request if needed
- ☐ Ensure phone, computer, and access to network accounts are ready
- ☐ Arrange for a 1-day free parking pass for the first day
- ☐ Confirm necessary building access and identification is set up
- ☐ Call them before their first day to communicate first-day details and officially welcome them
- ☐ Confirm details and expectations for any remote work - Complete a fully remote or flexplace agreement
- ☐ Is the employee relocating? Do they need temporary housing or rental assistance? For additional guidance, check in with HR.
- ☐ Is the employee transitioning from another Lehigh department? If so, make sure to work out a transition plan with their previous supervisor.

2. On the First Day (Welcome and First Impressions)
Tip: <mark>When managers are actively involved in the onboarding process, new hires are 3 to 4 times more likely to describe their experience as exceptional. (Gallup)</mark>

- ☐ Personally greet and welcome the new staff member on their first day
- ☐ Conduct a tour of the office, building, and immediate work area.
- ☐ Make key introductions to direct reports, colleagues, and administrative partners
- ☐ Introduce the Peer Advisor
- ☐ Review the University's Mission, Core Purpose, and The Principles of Our Equitable Community

- [ ] Discuss proper equipment usage, email etiquette, and confidentiality rules
- [ ] Review the provisional period and performance schedule
- [ ] Take the new staff member (and Peer Advisor if using one) out for lunch
- [ ] Confirm completion of I-9 and necessary Payroll forms, discuss deferred pay if applicable
- [ ] Confirm completion of mandatory training (assigned in the onboarding portal)
- [ ] Confirm [background check](#) completion
- [ ] Confirm access to Google suite and any necessary software
- [ ] Confirm they are scheduled for or have completed their Benefits Orientation

3. First Week (Job Clarity & Context)
Tip: Strong onboarding can boost productivity by 50%

- [ ] Review their Position Description (PD)
- [ ] Establish initial performance standards and expectations for the first 90 days
- [ ] Provide the department's organizational chart and contact lists for any key colleagues
- [ ] Provide any historical context that could be important: annual reports, expense reports, project documents
- [ ] Inform the staff member of available training sources (Learning Library)
- [ ] Introduce them to Page Up, Lehigh's Talent Management system
- [ ] Introduce them to TimeClock Plus, time-tracking system
- [ ] Make sure the employee is set up with long-term parking
- [ ] Elicit and discuss any immediate questions or concerns

4. First 30 Days (Performance Check-in)
Tip: 20% of Turnover happens within the first 45 days. This is your window to make the largest impact.

- [ ] Meet and evaluate initial performance
- [ ] Provide specific, constructive feedback and positive reinforcement
- [ ] Set up one-on-one meetings for the staff member with colleagues and key contacts across campus
- [ ] Establish measurable goals and timelines for completion
- [ ] Introduce them to campus by attending an event outside of your department

5. First 90 Days (Goals & Networking Completion)
Tip: 69% of employees who had a structured onboarding program stay three years or more

- [ ] Confirm that all initial networking meetings have been scheduled or completed with:
    - [ ] Key constituents (on and off-campus)
    - [ ] Relevant committees (e.g., CEC, ERAC)
    - [ ] Key vendors/contractors
- [ ] Discuss long-term goals and objectives for the position and the department

6. First 180 Days and Throughout the First Year (Provisional Review & Follow-up)
Tip: 86% of new hires decide how long they will stay with a company in the first six months.

- [ ] Prepare the Provisional Period Progress Report (found in Page Up)
- [ ] Schedule a formal meeting to discuss the Provisional Report and overall performance
- [ ] Discuss long-term goals and objectives for the next year
- [ ] Set clear performance expectations for the following year
- [ ] Schedule the final formal review upon completion of the full year

Manager Onboarding Plan Template

Purpose: This planned onboarding document outlines supervisor responsibilities and milestones across a new staff member's first year to ensure a smooth transition, strong engagement, and early performance success.

Guiding Principles:

- Early preparation improves retention and engagement.
- Manager involvement is critical to onboarding success.
- Structured check-ins reduce early turnover.
- Relationship building and clarity of expectations drive long-term performance.

Timeframe	Phase	Focus
2-4 weeks before start date	Phase 1 - Preboarding	Readiness & Welcome
Day 1	Phase 2 - Onboarding	Orientation & Belonging
Week 1	Phase 3 - Onboarding	Role Clarity & Context
Month 1	Phase 4 - Onboarding	Early Feedback
Month 1 - Provisional Period	Phase 5 - Longboarding	Campus Connection
Provisional Period - Year 1	Phase 6 - Longboarding	Campus Integration

A great onboarding plan is more than paperwork and first-day orientation. It's a structured, time-phased experience that helps new employees feel welcomed, become productive, and build lasting connections to the institution. Successful onboarding is a process, not an event, supporting an employee's growth and engagement over time. New hires don't leave because their laptop was late; they leave because they feel disconnected, confused, or unsupported. That's why ownership matters, when everyone owns onboarding, no one owns onboarding. Defining clear roles provides accountability and prevent gaps and delays. Most importantly, a strong onboarding plan should launch performance, not impede it.

Phase 1: Preboarding (2–4 Weeks Before Start Date)

Objectives: Ensure operational readiness, reduce first-day anxiety, and create a welcoming experience

Milestones: Onboarding plan created and prepped before the first day, Peer Advisor assigned 1 week before start, First-day agenda sent 2–3 days before start

Action	Accountable for Completion	Date Completed/Notes
Create and review onboarding tasks in the Page Up Onboarding Portal. Assign ownership and communicate timeline.		
Select a Peer Advisor		
Enroll employee in required training		
Prepare physical work space		
Submit facilities and access requests		
Secure technical and office supplies		
Arrange temporary parking until pass is received		
Contact new hire to coordinate their first day		
Create a transition plan if internal transfer from within Lehigh		
Complete any necessary flexplace or remote work agreements		
Ensure I-9 and background check completion		

Items for follow-up: _____

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Phase 2: Onboarding - First Day

Objectives: Provide a warm welcome and make all necessary introductions

Milestones: All required paperwork submitted, system access verified, benefits orientation scheduled

Action	Accountable for Completion	Date Completed/Notes
Personal welcome and tour		
Introduce colleagues and peer advisor		
Review university core documents: mission, strategy, principles, etc.		
Confirm outstanding items on the checklist		
Troubleshoot and remedy any access or logistical issues		
Discuss overall onboarding plan and timeline including provisional period		
Host welcome lunch		
Allow time for them to get comfortable in their space		
Confirm benefit orientation - This sometimes occurs on day 1, it is documented in their offer letter		
Confirm Google Suite access		
Training on any necessary Equipment		

Items for follow-up:

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Phase 3: Onboarding - First Week

Objectives: Clarify role expectations, provide operational and historical context

Milestones: Performance expectations documented, training access confirmed, long-term parking arranged

Action	Accountable for Completion	Date Completed/Notes
Review Position Description		
Create an agenda for Week 1 - Utilize colleagues and cross campus partners to teach and train when possible		
Establish 90-day performance expectations		
Provide and review organizational chart		
Share departmental and job related history and key documents		
Introduce CE@L and the Page Up employee services tools		
Introduce Time Clock Plus		
Arrange long-term parking		
Allow dedicated time for Q&A		

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Phase 4: Onboarding - First Month

Objectives: Reinforce strengths, identify and address early challenges

Milestones: Formal feedback on progress provided, goals and timelines documented

Action	Accountable for Completion	Date Completed/Notes
Formal 30 day Check in with Constructive Feedback		
Set measurable goals and timelines		
Schedule networking meetings		
Attend an on campus event		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		

Items for follow-up:
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Phase 5: Longboarding - First 1-6 Months

Objectives: Expand relationships, align performance with department strategy

Milestones: Networking meetings completed, 60-90 day check in completed

Action	Accountable for Completion	Date Completed/Notes
Confirm completion of networking meetings and any follow up or additional meetings		
Sign up for New Employee Orientation		
Discuss long term departmental goals and strategy		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		

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Phase 6: Longboarding First 6 months - 1 year

Objectives: Evaluate readiness for long-term success, formalize future performance expectations

Milestones: Provisional report submitted, performance plan finalized, annual review scheduled

Action	Accountable for Completion	Date Completed/Notes
Prepare, complete and share provisional period report		
Discuss and decide on next year's goals		
Invest in additional Lehigh Training		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		
Insert Department specific Training here		

Items for follow-up: _____

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*Onboarding Plan Completed Date:*_____
*Employee Signature:*_____
*Manager Signature:*_____