



Subcontractor onboarding checklist

Everything to collect before a new subcontractor starts on any project. Tick each line as it comes in, with the date and your initials.

Subcontractor:

Project:

Trade and tier:

Planned start date:

	DATE	INITIALS
☐ Signed subcontract, with the insurance exhibit for the right tier		
☐ W-9 with the exact legal name and tax ID		
☐ Contractor license, checked with the state where one is required		
☐ Certificate of insurance received from the agent, or confirmed with the agent, and reviewed		
☐ Every required endorsement received and reviewed		
☐ Workers' compensation exemption certificate checked, if the subcontractor claims one		
☐ List of sub-subcontractors, with their insurance documents		
☐ Safety program, or the name of a safety contact		
☐ Emergency contact and project contact details		
☐ Wrap-up enrollment completed, if the project has an OCIP or CCIP		
☐ Status set to Compliant in the tracker		
☐ Accounts payable and the project manager told of the approval		

Notes

Cleared to start by:

Date:

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