

The Comprehensive Subcontractor Onboarding Checklist

Use this checklist to ensure that all new subcontractors receive a consistent and thorough onboarding experience on your projects.



1. Execute Contract Agreements

Start the onboarding process by drafting a contract that defines the scope of work that the subcontractor will be responsible for. Key contract components include:

- Business information
- Scope of work
- Payment terms
- Change order management
- Licensing/insurance requirements
- Dispute resolution process
- Termination clause
- Flow-down provisions



2. Document Insurance & Bonding

Next, general contractors need to procure a Certificate of Insurance (COI) from the subcontractor. These certificates provide critical information, so general contractors can:

1. Ensure the subcontractor has sufficient coverage
2. Or, structure a wrap-up policy that covers all gaps

3. Hold Pre-Mobilization Meetings

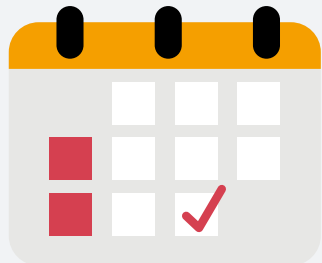
Pre-mobilization meetings are an opportunity for general contractors to meet in-person with subcontractors and convey key logistical information and project requirements, such as:

- Roles, responsibilities, and lines of communication
- Meeting schedules for the duration of project work
- Outstanding documents can be exchanged
- Procedures for issuing/reviewing info can be agreed on
- Site access and site induction can be discussed
- Change order processes can be reviewed
- Procurement schedules can be provided
- Mobilization plans can be reviewed

4. Schedule Labor & Materials

Subcontractors are typically operating on multiple projects at any given time. As follows, they need to be able to schedule labor and materials deployment so that they can meet other contracted obligations.

Once you have completed your project plan, you need to provide each sub with schedules so that they can ensure timely resource mobilization on your project.



5. Acquire Submittals

Before project mobilization can occur, you must collect remaining trade-specific information from each subcontractor on the project, including:

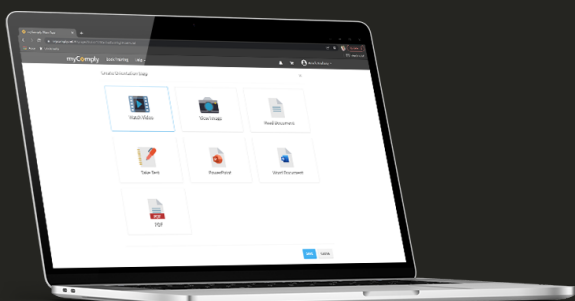
- Site safety plans
- Outstanding submittals
- Any drawings/renderings

6. Provide Worker Orientations

Once you have completed all of the logistical components of the subcontractor onboarding process, it's time to train the subcontractors and workers that will be on your project. Here's what you need to include in your orientation program:

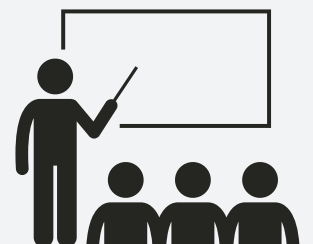
- Municipal, state, and federal regulation governing the site
- Safety expectations and your health and safety program
- PPE usage and requirements on the project
- Site safety plans, emergency exits, muster points, etc
- Introductions of important on-site personnel

Digital Document Transfer with myComply



Digitize documentation, manage subcontractor certifications, and create digital orientations programs with myComply's construction workforce management platform.

[Book a Demo](#)



- A company introduction
- Any necessary trade-specific training or information
- A site tour, physical or virtual

myComply