KIT 06 · SUB ONBOARDING

# Sub Onboarding

Every sub starts with the same eight documents — every time.

10-MINUTE SETUP EXCEL OR GOOGLE SHEETS UPDATED OCT 2026

## 01 WHAT THIS KIT PROTECTS

Onboarding is where risk enters the job. A missing W-9, an unsigned agreement or a lapsed COI becomes your problem at the worst possible moment. This pack makes the eight-document standard visible and stubborn.

## 02 WHAT THE AUTOMATION WATCHES

- Subs missing any of the eight documents
- Subs marked Ready without a COI
- New subs added to an active job

## 03 YOUR FILES

| Workbook | Playbook | Setup guide |
|---|---|---|
| Subs · Document checklist | This document — setup, ladder, emails | Deadline-365-Document-Pack.pdf |

## 04 SET UP IN 10 MINUTES

1. Add the sub and the contact before the kickoff call.
2. Mark a document Yes only when the file is in the folder.
3. Use the checklist tab to see what good looks like for each document.
4. Do not release the sub to site until Ready? says Ready.
5. Re-check COI status monthly — a sub can be ready in January and lapsed in June.

## 05 WHAT CHANGES

**DAY ONE**

The eight documents are the standard, not a suggestion.

**WEEK ONE**

No sub reaches site without Ready? saying Ready.

**MONTH ONE**

Missing W-9s and COIs are caught in days.

**QUARTER ONE**

Every job file survives an audit.

> **Included with every Deadline 365 account.** Nine workbooks, eight playbooks and the verified 57-jurisdiction rule set. Free accounts run every check in the app and see every result; email sending and extra recipients are Radar and All 8 features.

## 06 THE RHYTHM

| WHEN | WHAT YOU DO | WHAT THE AUTOMATION DOES |
|---|---|---|
| **Before kickoff** | Open the pack | Shows the exact missing documents |
| **Day 1** | Verify Ready? | Blocks site access if incomplete |
| **Monthly** | Re-check COI | Flags any policy that lapsed |

## 07 THE LADDER

| TRIGGER | ACTION | WHO |
|---|---|---|
| **Enquiry** | Send the pack and the document list | You |
| **3 days before start** | Chase every missing document | Automation |
| **Day before start** | Ready? must be yes | You |
| **Start day** | No pack, no site access | Superintendent |

## 08 THE EMAILS

**Documents needed before {date} — {sub}**

Hi {name}, before {sub} can start on {date we need the eight documents on the attached list. The missing items are: {list}. Send them here and I will confirm same day.

**Site access on hold — {sub}**

Hi {name}, {sub} is not cleared to start because {documents} are still missing. We will release them the same day the documents land.

## 09 GUARDRAILS

- A verbal promise is not a document.
- The W-9 name must match the agreement and the bank account.
- No pack, no site access. The superintendent needs to enforce it every time.

**Your next step.** Open Deadline-365-Document-Pack.pdf, connect this workbook on the Connect page, and turn on the Sub Onboarding check. Stuck? support@thermoneural.com answers in one business day.