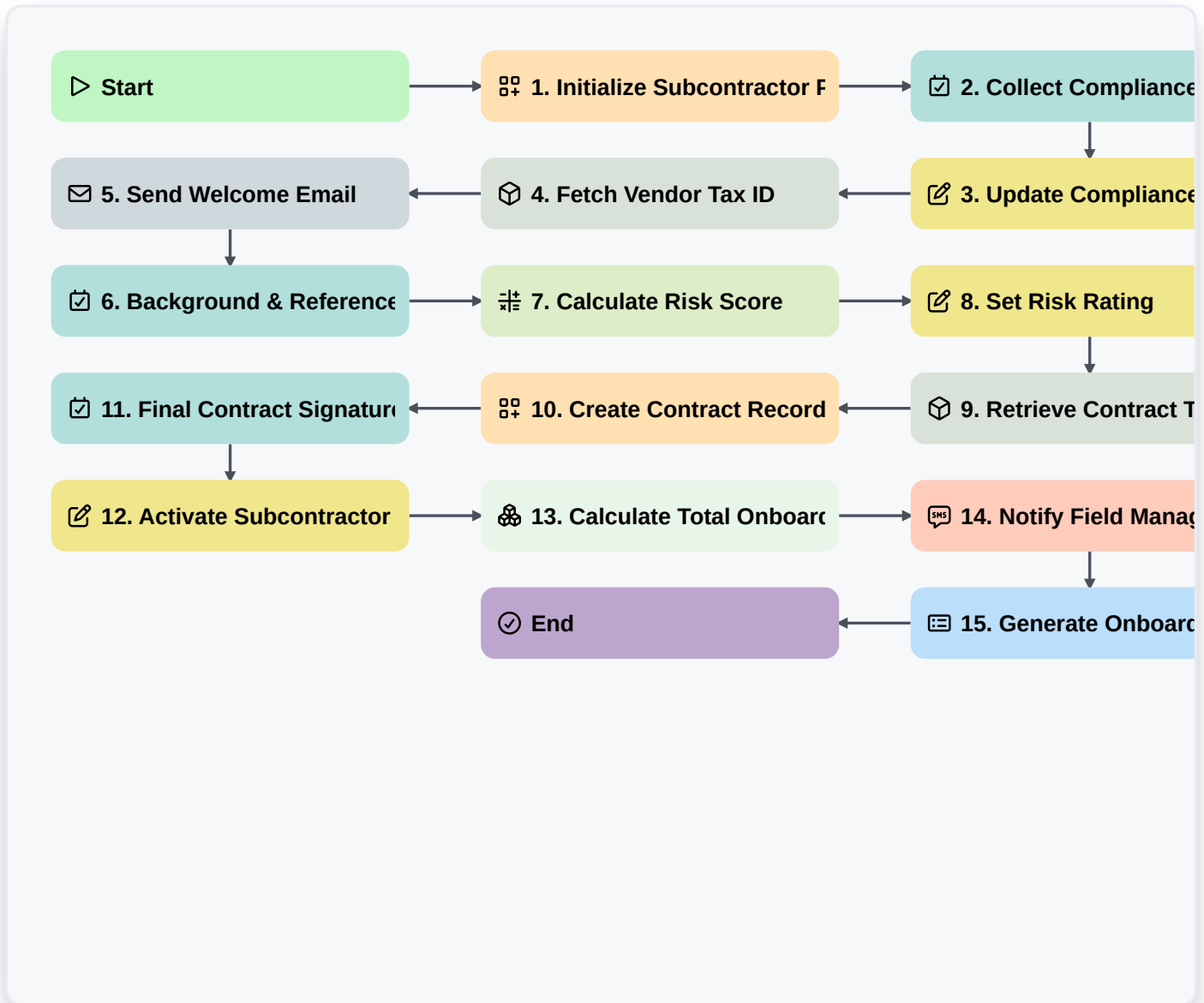


Subcontractor Onboarding And Management Process



▷ Start

Start of the Workflow/Process.

🗄️ 1. Initialize Subcontractor Profile

Create a new entry in the 'Subcontractors' data model to begin the onboarding record.

📁 2. Collect Compliance Documents

Assign a task to the Onboarding Coordinator to verify insurance, licenses, and tax documentation.

✍️ 3. Update Compliance Status

Update the 'Compliance Status' field in the Subcontractor entry to 'Verified' once documents are checked.

📦 4. Fetch Vendor Tax ID

Retrieve the Tax ID and company details from the submitted onboarding form.

✉️ 5. Send Welcome Email

Send a standardized welcome email to the Subcontractor containing the portal login instructions.



6. Background & Reference Check

Create a task for the Risk Management team to perform necessary background and reference checks.

7. Calculate Risk Score

Execute a formula based on compliance gaps, years in business, and reference ratings to generate a Risk Score.

8. Set Risk Rating

Update the 'Risk Rating' field in the Subcontractor data model based on the calculated score.

9. Retrieve Contract Templates

Fetch the relevant Master Service Agreement (MSA) template from the Data Model based on the service type.

10. Create Contract Record

Create a new entry in the 'Contracts' data model linked to the Subcontractor entry.

11. Final Contract Signature

Assign a task to the Subcontractor to sign the digital contract.

12. Activate Subcontractor

Update the 'Status' field to 'Active' once the signed contract is received.

13. Calculate Total Onboarded Cost

Sum the 'Onboarding Fees' or 'Setup Costs' from all active Subcontractor entries for budget tracking.

14. Notify Field Manager

Send an SMS to the Field Manager notifying them that a new subcontractor is ready for assignment.

15. Generate Onboarding Monthly Report

Create a report summarizing the number of new subcontractors onboarded and their average risk scores.

End

End of the Workflow/Process.