UPP / PRODUCTION RESOURCES

# Crew onboarding preparation checklist

Prepare the right startwork handoff and track readiness without putting identity documents or banking details in a shared checklist.

Mark completed items. Record an owner or reference; carry unresolved items into the action record.

**Project / production:** **Worker reference:**

**Role / department:** **Start date / reviewer:**

### 01 Prepare the engagement

| Done | Review item | Owner or reference |
|---|---|---|
| ☐ | Confirm the engaging company, role, dates, and actual work locations. | |
| ☐ | Route classification, rate, and agreement questions to the responsible reviewer. | |
| ☐ | Send the correct invitation and explain where the worker can get help. | |

### 02 Route required records

| Done | Review item | Owner or reference |
|---|---|---|
| ☐ | Identify the applicable identity, work-authorization, and tax-form workflow. | |
| ☐ | Direct payment details and sensitive records into the approved secure system. | |
| ☐ | Record review status and references without copying document or account numbers. | |

### 03 Confirm the next step

| Done | Review item | Owner or reference |
|---|---|---|
| ☐ | Assign follow-up for missing items and record the next review date. | |
| ☐ | Confirm the worker has call details, site instructions, and the right contact. | |
| ☐ | Ask the authorized reviewer to record readiness and any work restrictions. | |

### Open action and handoff

Action / reference:

Owner: Due: Reviewed by / date:

This is a preparation record, not an employment agreement or eligibility determination. Do not enter SSNs, SINs, bank details, or identity-document numbers.

Official sources, where applicable: Form I-9 | Form W-4 | TD1 personal tax credits returns | Québec source deductions return