

New Vendor Onboarding Checklist for Procurement

Implementing a **new vendor onboarding checklist** streamlines the procurement process by ensuring all necessary documents and compliance requirements are met. This checklist helps maintain consistency, reduces risks, and accelerates the integration of suppliers. Proper vendor onboarding ultimately supports efficient and transparent procurement operations.

Checklist

- Vendor application form completed and submitted
- Company registration certificate collected
- Tax identification number (TIN) or equivalent obtained
- W-9 or relevant tax forms (if applicable) submitted
- Proof of insurance (liability, workers' comp, etc.) provided
- Banking information for payments secured
- Non-disclosure agreement (NDA) signed (if required)
- Compliance with internal policies and code of conduct verified
- References and previous client feedback reviewed (if necessary)
- Supplier background and risk assessment completed
- Anti-bribery and anti-corruption declaration signed
- Sustainability/environmental certifications gathered (if needed)
- Contact and escalation details confirmed and recorded
- Supplier added to approved vendor list/system
- Onboarding and procurement training provided (if required)

Approval & Integration

- All documentation reviewed and approved by procurement
- Vendor profile created in procurement system
- Welcome and communications package sent to vendor
- First purchase order process initiated (as applicable)

Notes & Follow-Up

- Schedule periodic review of vendor compliance and performance
- Update records if there are any changes in vendor status or information
- Maintain open communication channels for ongoing relationship management