

Driver onboarding checklist (20 items)

Mark each item as completed. Collaborator and manager sign at the end.

Phase 1 — Week 1 (5 items)

- 1. Receive and read the mileage reimbursement policy
- 2. Receive the trip purpose checklist
- 3. Register vehicle in the system (plate, model, year)
- 4. Access to the log system (Clara/spreadsheet/internal app) granted
- 5. 5-question policy quiz passed

Phase 2 — Week 2 (5 items)

- 6. Hands-on demo with manager (30 min)
- 7. First trip logged with immediate review
- 8. Knows the 3 most common purposes for the role
- 9. Knows the monthly cap and submission deadline
- 10. Knows the approval flow and direct approver

Phase 3 — First month (6 items)

- 11. Daily logs consistent (no gaps)
- 12. First submission within deadline
- 13. Line-by-line review by manager
- 14. Feedback given and applied
- 15. Receipts attached correctly
- 16. First reimbursement paid without issues

Phase 4 — Quarterly (4 items)

- 17. Quarterly business-purpose review
- 18. Vehicle update if changed
- 19. Policy refresher (if changed)
- 20. Process satisfaction survey (internal NPS)

Signatures

Collaborator: _____ Date: __ / __ / ____

Direct manager: _____ Date: __ / __ / ____

