



PROVIDER ONBOARDING

Accoree Service Provider Onboarding Checklist & Guide

Everything you need to get approved, activated, and ready for work.



Introduction

Joining the Accoree network connects your company to high-value commercial clients that expect reliability, professionalism, and consistent performance. Before you can begin receiving work orders, we need to verify that your business, your team, and your operations are prepared to deliver safely and successfully.

This guide outlines exactly what you'll need to provide — from licenses and insurance to technician details, hours of operation, and service capabilities. When you complete this checklist, you'll move through onboarding faster and position yourself as a trusted, ready-to-work partner for national and regional clients.

01

Company Information, Contact Details & Service Capabilities

Your company profile should clearly communicate who you are and what you do. The core information you provide determines your eligibility, helps match you to the right service opportunities, and ensures you meet all compliance requirements. Supplying accurate, up-to-date details allows clients to understand your capabilities and ensures you're connected with the jobs that best fit your skills, coverage area, and operational strengths.

HAVE READY

- ☐ Legal business name and DBA (if applicable)
- ☐ Business address, phone number, and primary email
- ☐ Owner/operator name and contact information
- ☐ Main point of contact for scheduling or dispatch
- ☐ Business tax identification number (EIN or equivalent)
- ☐ Copy of the owner-operator's valid driver's license
- ☐ Company website or social profiles (if available)

TRADE CATEGORY & SUBTRADES (REQUIRED)

Provide all categories that accurately reflect your company’s service capabilities. This information determines the type of work you’re eligible to receive and helps confirm that you meet all required licensing and qualification standards for each category you select.

Select your primary trade category:

General Maintenance

Electrical

Plumbing

HVAC / Mechanical

Carpentry / Handyman

Landscaping & Grounds

Roofing

Painting

Cleaning / Janitorial

Fire & Life Safety

Security Systems

Pest Control

Specialty Services (specify)

List all applicable subtrades or specialties: (examples include)

Electrical → Lighting, Panel Upgrades, Low Voltage, Generators

Plumbing → Drain Cleaning, Sewer Jetting, Backflow, Water Heaters

HVAC → RTU repair, Refrigeration, Ductwork, Preventive Maintenance

Carpentry → Drywall, Doors, Flooring, Millwork

General Maintenance → Fixture repair, shelving, punch list work

Fire/Life Safety → Alarm systems, sprinklers, suppression, inspections
(Provide as many as apply.)

02

Operational Readiness

Demonstrate when and how you can respond, because clients rely on providers who offer clear timelines, defined coverage areas, and predictable service availability. The more clarity you provide about your operational readiness, the easier it is for clients to match you with the right opportunities and trust that you can deliver when it matters most.

HAVE READY

- ☐ Standard hours of operation
- ☐ After-hours and emergency service availability
- ☐ Standard hourly rate(s)
- ☐ Emergency / after-hours rate(s)
- ☐ Maximum travel radius or service distance from your base location
- ☐ Number of field technicians available by category or skill
- ☐ Description of service vehicles, tools, and specialty equipment

03

Insurance & Risk Coverage

Meet required safety and liability standards by maintaining proper insurance coverage that protects both your business and the client on every job. Make sure all policies list accurate coverage limits, carry current expiration dates, and reflect the correct legal business name on all documentation.

REQUIRED DOCUMENTS

- ☐ Active Certificate of Insurance (COI)
- ☐ General Liability policy
- ☐ Auto Liability (if company vehicles are used)
- ☐ Workers' Compensation (if required in your state)
- ☐ Umbrella or Excess Liability (if applicable)



04

Licenses & Certifications

Showing that your team is fully qualified to perform the work is essential for building trust with clients and ensuring compliance with industry and regulatory standards. Accurate, up-to-date licenses and certifications demonstrate that your technicians have the skills, training, and credentials required for the services you provide.

To keep your approvals active and avoid interruptions in work, organize your documentation by expiration date and renew certifications early. This prevents delays, maintains continuous compliance, and keeps you eligible for new opportunities.

REQUIRED DOCUMENTS

- ☐ Active business license
- ☐ Trade-specific licenses (plumbing, electrical, mechanical, etc.)
- ☐ Safety certifications (OSHA 10/30, first aid, specialized training)
- ☐ Manufacturer or industry certifications (if relevant)
- ☐ Valid driver's licenses for all field employees or subcontractors

05

Workforce Information

Detail who will represent your business in the field, because clients need confidence in the people arriving on their sites. Providing clear information about your technicians, including their names, roles, experience, and qualifications, helps clients verify that your team is trained, documented, and capable of performing the work safely and professionally.

The more transparent you are about your workforce, the easier it is for clients to trust your organization and continue sending opportunities your way.

PLEASE PROVIDE

Full list of technicians and/or subcontractors

Job titles and skill classifications

Trade category and subtrades for each technician

Years of experience

Copies of relevant certifications

Field supervisor or lead technician contact info

Eligibility documentation (must be legally authorized to work)





06

Financial & Tax Information

Financial and tax information ensures your business is set up to receive payments accurately and without delay. By providing completed tax forms, banking details for ACH or direct deposit, and any required business registration documents, you create a clean, verifiable financial profile that clients can trust.

This information helps prevent payment errors, supports proper tax reporting, and confirms that your company is operating legitimately and in good standing. Supplying these details upfront not only speeds up the approval process but also positions your business as organized, reliable, and ready for ongoing partnership.

REQUIRED DOCUMENTS

Completed W-9 (U.S.) or equivalent tax form

Bank details for ACH/direct deposit

Business registration or proof of good standing (if required)

Safety & Compliance Readiness

Show your commitment to safe, professional operations by providing the safety policies, training records, and documentation that demonstrate how your team works responsibly on every job site. Clients need assurance that the providers they partner with prioritize hazard awareness, proper procedures, and compliance with industry regulations.

While this information is not required, it is strongly recommended, as it signals that your organization takes risk management seriously. Supplying clear evidence of safety practices not only protects your team and the client's property but also strengthens your credibility, reduces liability concerns, and increases your eligibility for higher-value opportunities.

PLEASE PROVIDE

Written Health & Safety Plan (HASP)

OSHA logs or incident history

Safety training records for staff

Toolbox talk documentation (if available)

Proof of PPE usage or equipment maintenance logs



08

Final Review & Submission

Double-check before you submit to make sure nothing stands between you and approval. Taking a few extra minutes to review your information, documents, and details helps catch simple errors that can cause unnecessary delays like expired insurance, missing licenses, incorrect rates, or typos in your contact info.

Confirm that everything is current, complete, and consistent with your records. A clean, accurate submission moves through review faster, reduces back-and-forth, and shows clients you're organized, professional, and serious about the partnership from day one.

PLEASE VERIFY

- ☐ All uploaded documents are clear, current, and complete
- ☐ Subtrade and capability information is accurate
- ☐ Rate sheets and service hours are correct
- ☐ Safety and licensing documents match your trade category
- ☐ Contact details are up to date

TIPS FOR A SMOOTH APPROVAL

- ☐ Upload documents early to avoid delays.
- ☐ Keep digital copies of all licenses and insurance policies.
- ☐ Maintain consistent communication with your onboarding contact.
- ☐ Update your profile anytime your team or capabilities change.
- ☐ Be responsive — fast replies speed up the entire process.

ONCE YOU'RE APPROVED

You will become an active part of a verified, high-performance provider network, giving you exposure to clients who value consistency, skill, and professionalism. Staying compliant and keeping your information current helps you receive more opportunities, faster.

