<table>
<thead>
<tr>
<th>PMIWDC Onboarding Checklist</th>
<th>Access Link</th>
<th>Chair</th>
<th>Vice Chair</th>
<th>Board Member</th>
<th>Admin</th>
<th>Webmaster</th>
<th>Leadership</th>
<th>VPs</th>
<th>New Volunteer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Verify that Volunteer is an active member of PMI and PMIWDC</td>
<td></td>
<td>I</td>
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<td>R, A, C</td>
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<td>2  Assign primary mentor/team lead if needed.</td>
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<td>R, C</td>
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<tr>
<td>3  Shadow Associated Team Lead during transitioning period, e.g.: (Attend meetings with mentor, planning sessions)</td>
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<td>A</td>
<td>A</td>
<td>A</td>
<td>A</td>
<td>R</td>
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<tr>
<td>4  Request login to email, business cards, badge as applicable **Volunteer must provide how they want their name to be presented on business card (email to: <a href="mailto:admin@pmiwdc.org">admin@pmiwdc.org</a>)</td>
<td><a href="https://webmail.pmiwdc.org/">https://webmail.pmiwdc.org/</a></td>
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<td></td>
<td></td>
<td>A</td>
<td>R</td>
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<tr>
<td>5  Determine SharePoint Access Rights - Read/Write or Read Only &amp; inform volunteer</td>
<td>VP link: password:</td>
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<td>R</td>
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<tr>
<td>6  Request login to SharePoint (email to <a href="mailto:webmaster@pmiwdc.org">webmaster@pmiwdc.org</a>)</td>
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<td>I</td>
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<td>R</td>
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<tr>
<td>7  Setup Login to SharePoint and inform the volunteer</td>
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<td>A, R</td>
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<tr>
<td>8  Provide link to key documents and share point site, leadership guide, Strategic initiatives, current meeting minutes, standard templates, trip reimbursement, documents relating to the area volunteer will be working</td>
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<td>I, C</td>
<td>R</td>
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<tr>
<td>10 Direct volunteer to Template for pre-approval request for higher dollar expenditures (email: PMIWDC Finance team)</td>
<td></td>
<td>R</td>
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<td>A</td>
<td>R</td>
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<tr>
<td>11 Direct volunteer to standard templates including trip reimbursement, trip template. (email: PMIWDC Finance team)</td>
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<td>R</td>
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<td>(Finance)</td>
<td>I</td>
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<tr>
<td>12 Become familiar with PMI website content</td>
<td><a href="http://pmiwdc.org/">http://pmiwdc.org/</a></td>
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<td>R</td>
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<td>13 Become familiar with PMI Region 5 Website</td>
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<td>R</td>
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<td>14 Add volunteer to the respective email group as appropriate</td>
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<td>15 Read recommended documentation as recommended by leadership</td>
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<td>A</td>
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<td>A</td>
<td>R</td>
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<td>16 If transitioning to a new role with or without a team lead look up all the documentation regarding that area</td>
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<td>A</td>
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<td>17 Provide samples of Marketing brochure</td>
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<td>18 If board member or VP provide other accesses / promo codes as required</td>
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<td>19 Provide contact list for leadership team</td>
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<td>R</td>
<td>I</td>
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<td>20 Introduce to membership at meeting, and introduce to other volunteers</td>
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<td>R</td>
<td>C</td>
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<td>21 Obtain and review action plan from Leadership</td>
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<td>PMI Onboarding Checklist</td>
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<td>22 If assuming a role for a current volunteer complete transition</td>
<td>Chair A</td>
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<td>23 Depending on role obtain information about essential meetings</td>
<td>Vice Chair A</td>
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<td>24 Explore PMI global learning site</td>
<td>Board Member A</td>
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<td>25 Be familiar with PMI WDC Vision &amp; Goals</td>
<td>Admin A</td>
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<td>26 Sign Code of Ethics and Confidentiality Agreements</td>
<td>Webmaster R</td>
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<td>27 Understand fiduciary responsibility of chapter and department</td>
<td>Leadership VPs A</td>
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<td>(email: PMIWDC Finance team)</td>
<td>New Volunteer R</td>
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<td>28 Add Board members to PMI Global Component List</td>
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<td>29 Review responsibilities of Volunteer, including: (1) Guidance on endorsement on</td>
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<td>products, providers, and organizations. (2) Conflicts of Interest. (3) Promoting</td>
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<td>PMIWDC among other chapters. (4) Delegation of Authority. (5) Privileged</td>
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<td>information. (6) Financial responsibility.</td>
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<td>30 After defined period, assess volunteer (is he providing deliverables, a good fit</td>
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<td>31 Continuously recognize Volunteer with rewarding work and immediate feedback</td>
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</tbody>
</table>

**R = Responsible:** Those who do the work to achieve the task

**A = Accountable:** Those who are accountable for the completion of the deliverable

**C = Consulted:** Those whose opinions are sought

**I = Informed:** Those who are kept up-to-date on progress