

5-Day VA Onboarding Checklist

A first-week execution plan for moving from orientation to controlled independent work. Use the days as a sequence, not a rigid productivity deadline.

Before Day 1 ■ Choose one clear first responsibility ■ Prepare required accounts and permissions ■ Set the communication channel and check-in time ■ Gather the SOP, example, or source material ■ Decide who answers questions and reviews work

Day	Goal	Checklist
DAY 1	Kickoff & orientation	■ Explain the business, role, immediate priority, and key contacts. ■ Confirm tool access and where questions should be raised. ■ Review communication rules, working hours, approvals, and escalation. ■ Give one simple, low-risk starter task or documentation review. ■ End the day by checking what is still unclear.
DAY 2	System training & first real task	■ Walk through one core process or tool live. ■ Show the expected output and explain the definition of done. ■ Let the VA try the process with guidance. ■ Assign one recurring, low-risk task with written instructions. ■ Set the review point for Day 3.
DAY 3	Supervised practice & feedback	■ Let the VA complete the task with less step-by-step help. ■ Review the actual output against the agreed standard. ■ Give specific written feedback: what was right, what changes, why. ■ Update the instructions if the same question could recur. ■ Add a second similar task only if the first process is stable enough.
DAY 4	Independent work & communication rhythm	■ Let the VA handle the familiar task with normal autonomy. ■ Keep yourself available for exceptions instead of hovering. ■ Ask for a short end-of-day update: completed, blocked, next. ■ Check that task status and source files are being kept current. ■ Introduce another routine process only if capacity and clarity allow.
DAY 5	End-of-week review & next-week plan	■ Have the VA complete the week's core task from start to finish. ■ Review quality, communication, blockers, and unresolved questions. ■ Confirm what can continue next week without close supervision. ■ Choose the next responsibility to add or the process to retrain. ■ Schedule the next check-in and keep access/approval boundaries clear.

Week-one success is not “fully trained.” A better result is that the VA understands the first responsibility, knows where to ask questions, can follow the communication rhythm, and has at least one process moving through a clear review loop. Slow the sequence down when the role is more complex.