


BUILDER ONBOARDING CHECKLIST



1

SUBMISSION

- Submit your forms and session information under the Setup tab
- Explore [Builder Resources](#) 
- Schedule your **Initial Onboarding Call** with your Client Success Manager

2

INITIAL ONBOARDING CALL

- Review launch timeline and Builder expectations
- Determine Builder access levels and roles
- Determine an internal team review process & timeline
- View Builder [webinar recordings](#) 
- Enroll in [DocNetwork University: Introduction to Builder Series](#) 

Look for an email from your Implementation Specialist to schedule Consultation #1!

3

TEST ACCOUNT & BUILD

- Schedule **Consultation #1** with your Implementation Specialist
- Review your test account forms
- Set up your [BugHerd account](#) 
- Use BugHerd to document form changes

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CONSULTATION #1

- Review changes made to your forms (if applicable), and/or changes needed
- Review account complexities identified by your Implementation Specialist

As needed, use your Implementation Specialist's calendar link to schedule Consultation #2!

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CONSULTATION #2

- Use BugHerd to tag additional items for review
- Review additional form change and discuss any challenges encountered
- Discuss registration setup process*
*registration organizations only

As needed, use your Implementation Specialist's calendar link to schedule Consultation #3!

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CONSULTATION #3

- Review the [Self-launch checklist](#) 
- Review registration setup*
*registration organizations only
- Apply draftset and complete final review of forms from the participant view

Look for an email from your Implementation Specialist, agree to the Launch Authorization Terms & Conditions, and launch your account!