Sole Trader Check list

Qualifications and Mandatory Training

This is a broad list as every person is different.

If you are choosing to be a registered NDIS service provider, then you will have more things to do such as the application to NDIS and completing all the modules for the services that you require.

Take your time to build your business and understand that it takes time. Clients will come however you are to be prepared for them to come and that includes financially.

Item	Yes	No	N/A	Comments
ABN – sole trader				
Business Insurance				
Car Insurance				
NDIS online module				
Covid online module				
Hand Hygiene online Module				
Police Check				
Working with children				
Proda account for worker screener check				
Worker Screener Check				
First Aid and CPR (CPR to updated annually)				
Certificate 111 or IV in Disability				
Aphra Registration (as applicable)				
Other relevant qualifications				
Ongoing professional development				

Business Paperwork Check list

There will be more to this list for those who are choosing to be registered NDIS service providers

Item	Yes	No	N/A	Comment
Accountant				
Business Plan				
Business Goals and Actions (helps with planning)				
Financial Plan – budget for sick leave, holidays, tax, superannuation, emergencies, software, expenses				
Marketing Plan – how and where will your market				
Define your ideal client (be specific)				
Policies and Procedures for every part of your business.				
Service Agreement Template				
Welcome pack and email, booklet				
Invoice				
Timesheet template				
Incident Report				
Incident Register				
Feedback Form				
Complaints Register				
Risk Assessment				
Risk Register				
Cancelation Policy				
OHS Policy				
Code of Conduct Policy				
Emergency and Disaster Policy				
Emergency Plan for participants				
Confidentiality Policy				
Emergency Plan for staff				
Conflict of Interest				
HR paperwork if employing staff				
Conflict of Interest Register				
Progress notes/Document template or app				
Authority to Act as advocate form				
Line-item number and prices – Price Catalogue				
Price Guide Arrangement				
Care plan – for clients				
Client registration form - onboarding				
Tax form				
Superannuation paperwork				
Medication Chart for nurse				
Wound Management chart for nurses				
Meeting Agenda				
Minutes template for Meetings				
Management flow chart if a company				

Other relevant information

- Accountant
- Lawyer if employing other staff or unsure of the agreement you
- Know your scope of practice and work within that
- Pricing range
- Offer FREE meet and Greet
- Be clear on the role you do, your ideal client and where they are. What problem do you solve?
- Have positive communication with others who provide services to the participant including plan manager
- Be always approachable and professional.

There maybe other things that you require for your specific services.

A website is great to have
Facebook Page
Facebook Ad
Letterbox drops
Community centres
Google Ad
Business cards
Flyers