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| **Item** | **Detail** | **Evidence seen and copied?** |
| **Unique Taxpayer Reference Number (UTRN)** | A self-employed PA must be registered with HMRC and be responsible for paying their own Tax and National insurance.  The UTRN number is issued by HMRC when an individual registers as self-employed. The PA Noticeboard obtains evidence of this check so this step has been completed for you. | PAs registered and accredited on the PA Noticeboard have been checked ✓ |
| **Public Liability Insurance** | If you engage the services of a self-employed PA you must see evidence of their current public liability insurance and note the issuer, policy number and expiry date.  The PA Noticeboard obtains evidence of this check and makes a further check when due for renewal so this step has been completed for you. | PAs registered and accredited on the PA Noticeboard have been checked ✓ |
| **Car Insurance** | If the PA is providing transport as part of their contract, you should ensure they have the correct level of car insurance – to protect yourself if anything happens.  The PA Noticeboard obtains evidence of car insurance and makes a further check when due for renewal so this step has been completed for you. | PAs registered and accredited on the PA Noticeboard have been checked ✓ |
| **Supplies / tools to do the job (e.g. gloves, aprons, etc.)** | Your PA should provide all of the supplies / tools needed to carry out their service; you should gain confirmation this will happen and you should not be expected to provide these for them. |  |
| **Cover for absence, e.g. holidays & sickness** | If your PA is unable to provide their service for whatever reason, they are responsible for providing cover. The substitute worker should be trained in all of your requirements and able to fulfil the services provided under the contract at no additional cost to you.  When a formal partnership is set up where each PA takes on their own clients for personal care services (the partners do not employ any other workers under their formal business structure and agree collectively to cover each other's holiday and sickness). As a partnership they should be registered with CQC (more details below).  If you are requested to pay the substitute worker yourself, then all the checks detailed in this document also apply to them and you must seek confirmation of their self-employed status.  You should ensure you are clear how a self-employed PA will manage absences and that you meet any alternative PA arranged by them. You are not expected to pay holiday pay, sick pay or any other statutory obligation under employment law. |  |
| **Contract for services** | Your PA should provide a working agreement for both parties to sign. | PAs registered and accredited on the PA Noticeboard will provide an agreement, they are also available on the PA Noticeboard website ✓ |
| **Invoicing** | You should expect to receive an invoice for the service provided. The invoice should include the following:-   * The document must clearly display the word ‘invoice’ * A unique identification number (invoice number) * The company name, address and contact information * The name and address of the customer the invoice relates to * A clear description of what you’re charging for * The date the goods or service were provided (supply date) * The date of the invoice * Due date of payment * The amount(s) being charged * VAT amount if applicable * The total amount owed   **You should only make payment on receipt of an invoice** |  |
| **Training** | Your PA should source and fund all training relating to their work, e.g. Moving & Handling, Medication awareness, First Aid and any specialist skills.  Take copies of training certificates and ensure refreshers required are managed in a timely manner (including delegated health task training).  Free online training is available via the PA Noticeboard and the following mandatory training is completed by all accredited PAs:  First Aid, Health & Safety and PPE |  |
| **Disclosure and Barring Service check and references** | Ensure you request and check references before work commences.  The PA Noticeboard will organise an enhanced DBS (Disclosure and Barring Service) check for your PA. |  |
| **Care Quality Commission (CQC) registration** | A PA may need to register with CQC if they provide, or intend to provide, health or adult social care activities in England. This is a legal requirement under the Health and Social Care Act 2008. They must apply to be registered even if they do not intend to provide the services on a regular or permanent basis.   * If not doing regulated activity - no need to register * If doing regulated activity check the decision under 'Do you need to register to provide Personal Care' in the following web link:   [Scope of registration: Regulated activities - Care Quality Commission (cqc.org.uk)](https://www.cqc.org.uk/guidance-regulation/providers/scope-registration-regulated-activities#personal-care)  If PA is still unsure they can email CQC: [Enquiries@cqc.org.uk](mailto:Enquiries@cqc.org.uk)  Mark email for the attention of 'regional registration team managers', include postcode and information about the job role and why it is unclear on the decision tree. |  |