Participant Onboarding Checklist

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How to use this Checklist:

This checklist helps independent support workers **properly onboard new participants** while ensuring **clarity, compliance, and professionalism.** Each step is designed to streamline communication, confirm funding, support type, and **set clear expectations.**

Step 1: Initial Consultation

- [ ] Schedule an initial consultation with the participant, family, plan manager, or support coordinator.
- [ ] Discuss participant goals, needs, and challenges.
- [ ] Clarify support expectations (frequency, hours, types of assistance).
- [ ] Identify key preferences, routines, and support styles.
- [ ] Discuss boundaries, communication methods, and emergency protocols.

Tip: Use open-ended questions like, "What does a good day of support look like for you?"

Step 2: Confirm NDIS Funding & Service Suitability

- [ ] Verify whether the participant is self-managed or plan-managed.
- [ ] Confirm approved NDIS funding categories & line items for your services.
- [ ] Ensure the participant understands their budget and how your services align with it.
- [ ] Discuss the invoicing and payment process (e.g., plan manager contact details if applicable).
- [ ] If unsure, direct them to their NDIS plan manager or Local Area Coordinator (LAC).

Tip: Develop a good relationship with plan managers and coordinators!

Step 3: Gather essential Documentation

Collect or verify the participant's:

- [ ] NDIS number & plan review date
- [ ] Emergency contacts & key support team members
- [ ] Relevant medical, therapy, or behavior support plans
- [ ] Risk assessments or alerts (e.g., mobility, medication, safety concerns)
- [ ] Request any necessary background information (e.g., therapy reports, communication strategies).
- [ ] Understand any restrictions, safety plans, or mandatory reporting requirements.

Tip: Having clear documentation reduces risks and improves service quality!

Step 4: Create & Customise the Service Agreement

Use the **Service Agreement Template** provided and customise it for the participant.

Ensure it clearly outlines:

- [ ] Services provided (including NDIS line items)
- [ ] Hourly rates, invoicing schedule, and cancellation policy
- [ ] Agreement duration and review process
- [ ] Responsibilities of both worker & participant
- [ ] Send a draft copy for review and discuss any concerns.

Tip: A well-drafted agreement prevents misunderstandings and payment issues.

Step 5: Send & Review the Service Agreement

- [ ] Email or provide a printed copy of the agreement for participant review.
- [ ] Allow the participant (or their representative) time to ask questions or suggest changes.
- [ ] Ensure both parties review, sign, and keep a copy of the agreement.
- [ ] Store a signed copy securely in your records.

Important: Never begin services without a signed agreement.

Step 6: Set up Key Processes & Communication

- [ ] Confirm the participant's preferred communication method (email, text, call, messaging app).
- [ ] Agree on how you will track progress and provide updates (e.g., session notes, verbal check-ins).

- [ ] Set expectations for cancellations, rescheduling, and emergency contacts.
- [ ] Discuss reporting requirements for the participant's plan manager, support coordinator, or family.

Tip: Setting clear expectations now prevents miscommunication later.

Step 7: Schedule the First Session & Prepare for Success

- [ ] Confirm the first session date, time, and location.
- [ ] Ensure you have all necessary support plans & participant details.
- [ ] Prepare any materials, activities, or resources needed for the session.
- [ ] Send a session reminder to the participant and/or their support team.
- [ ] Follow up after the session to check in and gather feedback on the experience.

Tip: A positive first session builds confidence and trust!

Avoid these common Onboarding Mistakes

X No written agreement → Leads to misunderstandings and unpaid invoices.
X Not confirming funding type → Can result in delayed or denied payments.
X Skipping initial consultation → Leads to mismatched expectations & poor service fit.
X No clear policies → Leaves you vulnerable to last-minute cancellations & disputes.
X Lack of follow-up → Hurts trust and long-term client relationships.

Best Practices:

✓ Always explain your role, services, and expectations upfront.
✓ Be clear about pricing and invoicing policies from day one.
✓ Maintain regular communication and documentation.
✓ Regularly review and update service agreements to reflect any changes.

Follow-up plan after Onboarding

1-Week Check-In:

- [ ] Ask the participant how they feel about the service so far.
- [ ] Address any adjustments needed in support or scheduling.
- [ ] Provide any extra guidance on invoicing or documentation.

Ongoing Check-Ins:

- [ ] Keep communication open and regularly review progress.

- [ ] Ensure the participant remains satisfied with your support.
- [ ] Keep track of **NDIS plan review dates** to update service agreements as needed.

Final Reminder:

A strong onboarding process helps build **trust, professionalism, and long-term success.** Taking the time to get this right will set you apart from others in the industry!