

PA INDUCTION CHECKLIST

To complete this check list you should:

- go through the list with your PA
- ask the PA to initial the boxes on the right to confirm they have learnt and understood each point on the list

Store the completed sheet with the PA's other personnel documents

PA name:		
Start date:		
Things to discuss with/explain to your new PA		
1. Terms and conditions	PA's initials	Date
Employment contract: • we discussed every section (this will cover almost every aspect of the job) • I encouraged questions from the PA • I filled in any blanks • we both signed two copies (I have given a copy to the PA and I have also kept a copy for my own records) • General Data Protection Regulation (GDPR) Employee data privacy notice given		
2. Job description	PA's initials	Date
Purpose of the job		
Key themes of the job: independence, confidentiality etc.		
How to do each task: • safely • In the way that you want • how often		
Do you want your PA to know about Direct Payments, or is this not important?		
3. New employee paperwork	PA's initials	Date
Personnel sheet: • I have checked the PA's right to work in the UK • I have taken photocopies of relevant documents e.g. the PA's passport		

we have completed the rest of the personnel sheet Info sheets given to PA:		
• Tax and National Insurance info sheet • Health and Safety Law leaflet • Rules of Employment and Expectations		
P45 obtained or P46 completed and returned		
Other payroll paperwork completed		
Seen DBS certificate. Expiry date		
4. Work environment	PA's initials	Date
Explain about other PAs and people who support you		
Ways out: how to get you both out in a fire/emergency		
Location of toilet facilities		
Location of refreshments e.g. water, tea and coffee		
Location of cleaning products and toilet paper etc.		
Appliances e.g. washing machine (where relevant to the job):		
• location • how to operate, safety instructions		
Information about your pets		
Parking/bike-storage arrangements explained		
5. Working arrangements	PA's initials	Date
How to complete forms:		
• timesheet • holiday request • expenses request • sickness/return to work form		
What process to follow if the PA is sick and unable to come to work		
Rules on smoking whilst at work		
How the PA should respond if your children/partner ask them to do something		

Should the PA answer the phone? Answer the door? Anything else?		
How work is allocated: should they start doing the same tasks every day, ask you, read from a list?		
How you and your PA will discuss how things are going - regular supervision meetings?		
6. Health and safety	PA's initials	Date
Ensure that health and safety risk assessment is complete and that you have talked your PA through the contents of it. Key areas to discuss are:		
a) Manual handling		
b) Equipment e.g. hoists, kitchen appliances		
c) Fire safety e.g. exits, location of extinguishers/fire blankets		
d) Maintaining hygiene e.g. wearing gloves/aprons		
e) Food hygiene		
f) Driving		
g) First aid e.g. location of first aid box and accident reporting		
h) Working in the community		
7. Queries and grievances	PA's initials	Date
Explain how you would like your PA to bring questions and issues to you. Is anyone else helping you to make management decisions (eg a relative), or with handling the admin? If yes, what queries go to them and which ones go to you?		