

Short on time before your HSP Site Assessment & Training (SAT) visit? This practical checklist focuses on the critical priorities: practitioner credentials, insurance, client records, and key documentation. Use it to ensure you have the essentials in place and identify urgent gaps before your deadline.

Practitioner & Accreditation Details

- ☐ Check that all **Qualified Practitioners (QPs)** are correctly listed on the HSP portal.
- ☐ Make sure each QP's **Professional Body membership** is current.
- ☐ Review your **accreditation and site details** – update if anything has changed.

Insurance & Business Details

- ☐ Public Liability insurance certificate ($\geq$ \$20 million).
- ☐ Professional Indemnity insurance certificate ($\geq$ \$10 million).
- ☐ Workers' Compensation (if applicable).
- ☐ All insurance certificates saved and current. Store in your SAT Evidence Folder

Client Records & Evidence

- ☐ Review 5–10 recent client files for completeness: voucher, consent, quote, audiogram, fitting notes, and claim details.
- ☐ Ensure all client consent forms are signed.
- ☐ Secure storage & Back-up confirmed (physical and/or electronic).

Facility & Equipment

- ☐ Calibration certificates current (within 12 months).
- ☐ Ambient noise level certificate valid (within 3 years).
- ☐ Client Rights and Responsibilities displayed at reception.

Final Readiness Check

Tip: Allocate specific time slots in your calendar for each section of the checklist. This will help you stay organised and avoid last-minute rushes.