

Step-by-Step Quick Guide

Starting as a Safe, Quality Micro Provider

Becoming a Micro Provider is about more than compliance. It's about being safe, professional, legal, reliable and genuinely caring. This guide walks you through how to get there. Micro-providers are independent, self-employed individuals (sole traders) who offer paid-for support or care services, typically within their local community.

Services include everyday support (shopping, meal prep, companionship), home and lifestyle support (cleaning, pet care, garden maintenance), and specialised support (post-hospital discharge, mobility assistance).

They promote independence, reduce isolation, support hospital discharge, and create local jobs.

If you want to join our network of Portsmouth Professional Micro Providers, please ensure you read and agree with the [Portsmouth Code of Good Practice](#) as a set of standards that you are willing to work by. If these work for you follow the steps below.

STEP 1: Decide if Self-Employment Is Right for You

Before anything else, reflect honestly.

Ask yourself:

- Do I have the drive, motivation and determination to be self-employed?
- Can I manage financial peaks and troughs, or do I prefer a steady income?
- Am I willing to find my own work, promote myself and build relationships?
- Do I enjoy the services I want to offer?
- Do I genuinely care about people, dignity and independence?

Most successful Micro Providers are not in it for the money - they are in it because they care deeply about individualised, personalised support.

STEP 2: Be Confident and Competent in Your Services

You must:

- Only offer services you are experienced, trained and competent in
- Feel confident delivering those services safely

- Be able to evidence this through:
 - Training certificates
 - Experience
 - Ongoing learning
-

STEP 3: Understand Personal Care & CQC Requirements

Think carefully about your offer:

- Will you provide personal care now or in the future?
 - Helping with washing, dressing
 - Supporting with toileting
 - Feeding
 - Administering medication

Personal care is a regulated activity under CQC regulations.

Important:

As a sole trader or Micro Provider, you *may not* need CQC registration if:

- You are working **under the direction and control of your client** (or their legal representative)
- You are **not assessing care needs**
- The individual decides **what, how and when** care is delivered

✦ You must fully understand **how CQC regulations apply to you** in practice.

**We can help you further with understanding this in our programme*

STEP 4: Get Your Legal and Safety Basics in Place

These are **essential**.

✓ Enhanced DBS

- Must be enhanced
- Ideally within the last **3 years**
- Demonstrates trust and safety

**You will need to apply for this through an umbrella company*

✓ **Public Liability Insurance**

- Must cover *all* services you intend to provide
- Check carefully with your insurer
- Update if services change

✓ **Register with HMRC**

- Register as a **sole trader**
- Receive your **UTR number**

✓ **Confirm Self-Employment Status**

- Complete the **CEST tool** on the HMRC website
- Print and keep the certificate for your records

[Check employment status for tax - GOV.UK](#)

*we can support with completing this if required

STEP 5: Set Up Your Business Practically

Think about your professional setup:

- Will you open a separate business bank account?
 - Many providers do
 - Some accounts are free; others charge a fee
 - Many allow invoicing directly from the app
 - Will you have:
 - A separate business phone number?
 - A separate email address?
 - How will you manage tax?
 - Complete your Self-Assessment yourself, or
 - Use an accountant
-

STEP 6: Put Written Agreements in Place

You should have clear documents in place from the start.

Terms of Service Agreement

This should cover:

- Start date
- Trial period (if applicable)
- Notice periods (both sides)
- Cancellation policies
- Rates and payment terms

Templates can be adapted for your business.

We can provide you with templates, free to adapt.

STEP 7: Set Up Invoicing

Your invoice should:

- Be issued according to your agreement (sessional, weekly or monthly)
 - Be **itemised**
 - Show:
 - Dates worked
 - Hours delivered
 - Services provided
 - Total amount due
-

STEP 8: Create Essential Policies

Policies show professionalism and protect both you and your client.

At a minimum consider:

- **Health & Safety Policy**
- **Lone Working Policy**
 - Someone should always know where you are

- Especially important for first visits
 - **Safeguarding Policy**
 - What you will do if you are concerned
 - You should also have safeguarding training
 - **Complaints Policy**
 - How a client can raise a concern
 - How it will be handled
 - **GDPR Policy.** How will you handle sensitive data and keep it safe?
 - Register with ICO
-

STEP 9: Build Your Professional Portfolio

Your portfolio should demonstrate that you are:

- ✓ Safe
- ✓ Legal
- ✓ Professional

Include:

- DBS certificate
- Insurance certificate
- UTR number
- Training certificates
- Policies
- Terms of Service
- Invoicing examples
- References
- Training certificates

This portfolio grows with you as you add training and experience.

STEP 10: Register with the Portsmouth Micro Provider Programme

Once core requirements are met, you can register

Core Requirements:

- Enhanced DBS
- Public liability insurance
- UTR number
- Understanding of CQC regulations
- Competence and confidence in services offered

You will be asked to agree to the:

Portsmouth Code of Good Practice

A commitment to:

- Quality services
- Safety
- Legal compliance
- Professional standards

Some elements are mandatory before joining; others can be worked towards.

STEP 11: Grow With Support

Once registered, support includes:

- Promotion of your services
 - Connections with social care teams
 - Visibility of requests for support
 - Attendance at community events
 - Opportunities to share your story and build your reputation
 - Join our Portsmouth Professional Micro Provider Facebook page
-

Final Message

As you work your way through the list if you get stuck you can join our workshops or webinars to get support and ask questions. Complete the [enquiry form](#).

If you are:

- ✓ Caring
- ✓ Passionate
- ✓ Competent
- ✓ Willing to work professionally and safely

Then **we would love to have you** as part of the Micro Provider community.