

Project readiness

Before a commitment

Sample planning checklist. A completed checklist does not provide legal approval. Use fictional project information in the demonstration.

☐ 01 Project definition

Record the state and actual worksite, duties and hazards, planned dates, headcount and host-client identity.

Owner: _____ Evidence / open action: _____

☐ 02 Employment and immigration

Name the legal employer, petitioner and counsel. Obtain assessment of the actual worker/project facts and the required authorizations.

Owner: _____ Evidence / open action: _____

☐ 03 Partner acceptance

Obtain written acceptance of the contracting chain, state, duties, class codes and service scope. Record limits and expiry dates.

Owner: _____ Evidence / open action: _____

☐ 04 Site safety and worker support

Agree supervision, training, PPE and incident responsibilities. Identify worker support, travel, accommodation and emergency contacts.

Owner: _____ Evidence / open action: _____

Continue on page 2 for commercial, payroll and release checks.

Project readiness

Before mobilisation

Sample planning checklist. A completed checklist does not provide legal approval. Use fictional project information in the demonstration.

☐ 05 Commercial terms and funding

Approve itemised costs, AmChex scope and fee, client credit, deposits, payment dates and funding capacity. Test late payment and cancellation.

Owner: _____ Evidence / open action: _____

☐ 06 Payroll and administration

Name time approvers and payroll/tax owners. Confirm deadlines, correction procedures, records and secure data handling.

Owner: _____ Evidence / open action: _____

☐ 07 Contracts and insurance

Review the contracts together. Confirm registrations/licences, policy scope, exclusions and responsibility for retained risks.

Owner: _____ Evidence / open action: _____

☐ 08 Release and changes

Require named release approval after specialist acceptance. Reassess changes to duties, site, employer, dates or worker eligibility.

Owner: _____ Evidence / open action: _____

Try the project enquiry example. Use fictional details only.