

Personal Assistant Management

Fourth Edition



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Who is The Central Iowa Center for Independent Living?

The Central Iowa Center for Independent Living (CICIL) is a non-profit corporation serving people with disabilities in central Iowa. CICIL is a non-residential, community-based, consumer-controlled and managed program helping people with disabilities live independently within their own communities and make their own choices concerning their lives. CICIL provides the following four services: independent living skills training, peer support, advocacy services and self-advocacy training, and information and referral. CICIL has established an Internet web page located at <http://www.raccoon.com/~cicil/>. This service provides links to a number of excellent resources. From our web site, you can send us e-mail messages and CICIL will respond to you either by e-mail, phone, or conventional mail. CICIL's mission statement is to empower individuals with disabilities to control their lives.

What is Independent living?

Independent living is control over one's life based on choices that minimize reliance on others in making decisions and in performing everyday activities. This includes managing one's own affairs, participating in day to day life in the community, fulfilling a range of social roles, and making decisions that minimize psychological or physical dependence on others. Ultimately, Independence is an idea that must be defined personally by each individual.

Independent living is the belief that all persons, regardless of disability, have the right and responsibility to control and direct their own lives, and to fully participate as equal members of society. Independent living can be any service which assists a person with a disability to have more control over their own life. Independent living is the concept that anyone with a disability can increase their level of independence if they have a voice in society plus the right skills and are part of a network of others with disabilities. Increasing independence means that persons with disabilities decrease their level of dependence on family, friends and community and rely more on themselves; building self-esteem, confidence, and pride along the way. Support services and training programs give a person with a disability the support to achieve self-sufficiency and lead productive lives. This approach follows the philosophy of self-reliance and self-determination.

What are Personal Assistance Services?

The Rehabilitation Act Amendments of 1992 describes the term Personal Assistance Services to mean "a range of services, provided by one or more persons, designed to assist an individual with a disability to perform daily living activities on or off the job that the individual would typically perform if the individual did not have a disability. Such services shall be designed to increase the individual's control in life and ability to perform everyday activities on or off the job. These include the performance of personal activities, household activities, parenting activities, and protection of self."

What is a personal assistant?

A personal assistant or attendant is an individual hired by a person with a disability to assist with daily activities that they cannot perform themselves. These might include, but are not limited to, personal care, transfers from a wheelchair, bathing, bowel/bladder care, cleaning, meal preparation or laundry. These tasks can range from assistance in getting up each morning, to housekeeping and running errands. Assistants allow people with disabilities to live in a less restrictive environment at home. They allow the person with a disability to control their own lives and activities. This promotes freedom for the person with a disability in pursuing an independent lifestyle. The assistance an attendant provides enables people to live independently and to pursue outside activities such as school or work. Personal assistance services might mean the difference between living at home and entering a nursing home.

The person with the disability is the employer of their personal assistant. The person with the disability hires, trains, supervises, disciplines and if necessary, fires the personal assistant. You as the employer have the responsibility for deciding what you need help with and how you want a task done. The more organized you are, the better you will be able to use your assistant's time and talents. Assistive services are a tool of independent living. You have a right to use that tool to determine your lifestyle, set up your living environment and decide how your assistant will be involved in your life.

Studies have shown that persons with disabilities who use personal care assistants that they manage have better health outcomes, with fewer hospitalizations and fewer complications. They also experience greater life satisfaction and significantly lower costs. Members of this sample who manage their own caregivers spend less money on their home care, despite the fact that they use more hours of paid care and fewer hours of unpaid or volunteer care each day. Managing a personal assistant shows you have supervisory skills and demonstrates to an employer your abilities in that area.



Introduction

This manual was created from the literature from 22 centers for independent living from 14 states. More than 600 pages of information have been condensed into this and the provider manual. Much of the material in this manual is gleaned from personal experience by persons with disabilities who are currently using personal assistance services in a variety of situations. It is intended as a guide for persons with disabilities to assist in managing your personal assistance services. It is NOT intended to answer all of the questions that you may have, but will help establish a framework for approaching the process. It is a tool to develop the skills you will need to further the efficient functioning of you and your personal care assistant. This manual is a work in progress as I incorporate the many valuable suggestions from you the consumer. I am happy to receive your suggestions.

This manual does not tell you exactly how to train and manage an assistant--each situation is different. It does not tell you when your routine should take place, how much assistant care you should use, or what duties you should have your assistant perform. These are decisions YOU must.

What are they called?

There are a wide variety of terms chosen by various agencies to designate the person providing personal assistance:

- reader/driver/guide
- personal care assistant,
- attendant,
- support care-giver,
- disabilities assistant, or
- personal services attendant.

Some are uncomfortable with the term attendant as they feel it comes from a medical model that referred to someone in charge of a sick person. However, attendant also means someone who waits on another. This curriculum generally refers to this person as an assistant instead of using an acronym for personal care attendant (PCA) or personal assistant (PA). No disrespect is meant, and as always in a consumer-driven program you are of course free to call your employee whatever you wish. No matter what you call them, they serve a vital function that can help to assure independent living.



Paying Attendants

Many programs pay for attendant care. Each has different eligibility criteria, application processes, and employer expectations. The following resources may help ease the financial burden of paying for your assistant:

1. Department of Human Services Programs/Waivers,
2. Department of Vocational Rehabilitation,
3. Department of Labor (workers' compensation)
4. Department of Veterans Affairs,
5. Private insurance benefits,
6. Medicare or Medicaid,
7. programs and services under the Older Americans Act,
8. State sponsored social services funded by the Social Services Block Grant, or
9. Supplemental Security Income payments.

Personal Care Assistant Job Description

Before you begin to interview prospective personal care assistants, it is a good idea to make out a description that covers all the tasks that you expect the assistant to perform. The more specific you are in defining job duties, the fewer problems you will have later with an employee whose understanding of the job may be different from your expectations. It also is an important tool to use during interviews to clearly explain job duties to applicants. It helps to prevent future misunderstandings between you and your personal assistant because all the tasks have been written down and agreed to before the personal assistant begins work.

The daily schedule will aid you in organizing the assistant's time so that all needed tasks can be completed during their work time. If one item on the schedule takes longer than expected, you and your personal assistant can look at the schedule and decide which tasks can be put off or rearranged. The schedule can be posted so that you do not have to explain what the assistant's duties are each day.

The agreement between employer and personal assistant is really the basis of a contract between you and the person that you decide to hire. The agreement ensures that you both clearly understand work hours, salary, job duties, and any other arrangements. The agreement establishes a good working relationship when you decide to hire your personal assistant.

It is very important to remember that you are an employer and that your primary relationship with your assistant is a business one. It is always nice to be able to enjoy your assistant as a friend, however, your work relationship should be the most important thing.

Personal Assistance Self-Assessment

The following questions can be used as guidelines to help aid you in determining what your service needs are. Think about your daily activities and those tasks that you require assistance with. Later you can tally how often you need these services, what time of day and how long each should take. The more preparation you put into identifying your areas of need, the easier it will be to communicate those needs to an assistant. Time spent now will pay off in the future.

Since personal care routines vary so much from one person to the next, each consumer must create a special package of checklists to meet their personal care needs. Estimate how much control you have over the following areas without an assistant and how much assistance you want. Do you need minimum, moderate, or intensive assistance with these activities?

A self-assessment can help you set priorities. You may have to revise our expectations to meet the level of expertise of the provider or the amount of money you have available for a personal assistant.

Research has shown that a system of checklists has worked well in other situations where people manage people. It can help you in training an assistant and in supervising that assistant. Checklists give you and the assistant a visual picture of what needs to be done. You might consider enlarging your checklists and posting them where the assistant can see them while performing your routine. They can be posted on the back of closet and cabinet doors, which can then be opened only during routines. Studies have found that posting detailed checklists can significantly cut down the time it takes to train your assistant. The checklists can then be put away until the next time you need to train a new assistant.

1. **Overview of disability** What parts of your life is affected by your disability? Describe your disability briefly, staying away from jargon. Give a brief medical history with current medical information that the assistant needs to know about to ensure your health and safety. You may have to educate the applicant about your particular disability and dispel myths concerning your disability.
2. **Endurance** Does your disability cause you to tire easily? Could your assistant handle activities that tire you so you can save your energy for other more important tasks? Describe the ways an assistant might lessen endurance issues.
3. **Strength/Coordination** Do you have limited strength in handling objects? Would it increase your safety and efficiency to have your assistant handle tasks requiring good eye-hand coordination? Describe the ways an assistant might assist you with strength and coordination issues.
4. **Transportation/Travel** Do you need someone to provide transportation to work,

- school, shopping, community affairs, or doctor's appointments? How often do you require transportation? Would you expect the driver to use their own vehicle or would you provide one? Describe how you would use transportation services.
5. **Work/Training** Do you require assistance at work to deal with issues such as getting ready for work, clerical assistance, job coaching or job accommodations? Describe the services an assistant could provide at work.
 6. **Mobility Assistance** Can you get around your home, neighborhood and community easily and safely? Do you need assistance negotiating stairs or curbs? Describe the ways an assistant might provide mobility assistance.
 7. **Communication** Do you require assistance using the phone or communicating with others?
 8. **Dressing** What parts of your body do you require assistance with? Do you require assistance matching clothes? Do you use special equipment to assist you in dressing? Describe the ways an assistant might assist you in dressing.
 9. **Eating** Can you feed yourself? Do you require assistance cutting meat? Do you require assistance in serving the food, or using utensils? Describe the ways an assistant might assist you in eating.
 10. **Diet** Is your diet affected by your disability? Is the amount of salt, sugar, etc. in your diet restricted? Are there medical consequences if your diet is not followed closely? List any food allergies or dietary restrictions.
 11. **Hair Care/Grooming** Can you shampoo your own hair? Can you shave yourself? Can you comb your hair? Can you do your own nails? Describe the ways an assistant might assist you in general grooming.
 12. **Medication** Are there any medications you must take regularly? Does your assistant need to have any special knowledge to assist you if you become ill or have a reaction to your medication? Describe the ways an assistant might help monitor your medication or medical supplies.
 13. **Bladder/Bowel Care** Do you have control of bladder and/or bowel functions? Do you use a bed pan or catheter? Do you use suppositories? Describe the ways an assistant might assist you with your bladder/bowel care.
 14. **Bathing** Do you require assistance getting in and out of the bath/shower? Can you bathe all parts of your body? Describe the ways an assistant might assist you in bathing.
 15. **Hygiene/Skin Care** Can you brush your teeth or care for your dentures? Can you cleanse yourself after using the bathroom? Can you take care of your needs during your menstrual cycle? Do you have skin problems or sores that require attention? Describe the ways an assistant might assist in your daily hygiene.
 16. **Equipment Set up** Do you use equipment or adaptive aids for dressing, bathing, feeding, transfers, etc.? Do you need help to set up or use these devices? Do you use any technical/electrical equipment, such as a computer or closed circuit tv, that your assistant could set up or provide maintenance for? Describe the equipment you use and how an assistant could assist you with that equipment.

17. **Transfers** Can you get from one surface to another without assistance? Do you need assistance getting into bed? Do you use special equipment or require assistance getting into or out of a vehicle? Describe the ways an assistant might assist you with transfers.
18. **Exercise** Do you have exercises intended to maintain your range of motion? Describe the ways an assistant might provide assistance with your exercise program.
19. **Domestic Assistance** Do you need assistance in maintaining your clothing or home? Do you need assistance with housekeeping duties such as laundry or cleaning? Do you need assistance reaching surfaces above wheelchair height? Describe the ways an assistant might provide assistance in domestic duties.
20. **Cooking/Kitchen** Can you cook at the stove or microwave? Can you heat already prepared foods? Do you need items replaced in specific places where they can be easily reached? Can you wash heavy pots? Describe the ways an assistant might provide assistance in cooking and/or kitchen clean up.
21. **Memory** Does your disability or medication affect your memory? Can your assistant remind you to check your schedule or take medication? Describe the ways an assistant might assist you with memory issues.
22. **Social Activities** Do you have any community activities that may require some kind of assistance, such as negotiating stairs or curbs, public restrooms, etc.? List any social or community activities you may have including recreation, meetings, church, medical appointments, etc. Do you require transportation or escort services for any of these activities? Describe any assistance your assistant could provide in community or social activities.
23. **Paperwork** Do you need assistance with paying bills or handling banking or other paperwork? Do you need assistance with print material? Do you require assistance with managing your money or financial records? Describe the activities where an assistant might assist with correspondence or paperwork.
24. **Mental Health** Do you have mental health issues that an assistant might help you with? Would you benefit from someone to remind you to take your medication, get up in the morning, praise appropriate behaviors, provide companionship for social situations, or assist with other mental health issues?
25. **Personality/Social Traits** Is it important to you that your assistant is:
 - the gender as you?
 - is of your same religious affiliation?,
 - is close to your own age?
 - is always on time?
 - is outgoing?
 - likes children or pets?
 Describe the personal attributes you desire in a personal care assistant.
26. **Other duties as assigned** Do you require assistance with pets or service animals? Do you require assistance with house maintenance, lawn care or snow shoveling? Describe any other activities where an assistant might assist you in activities of daily living.

Emergency Procedures

Are there any potential medical emergencies that you can anticipate that your assistant should be prepared for? You should alert your assistant to any conditions you are susceptible to and how to treat them. Educate your assistant on what medication(s) you are allergic to.

Consider the following situations and determine what kind of action you want your assistant to take--phone calls to be made, where the appropriate numbers are located, medical procedures to follow, equipment to be checked, etc. Substitute other emergency situations that might come up with your particular disability.

What should your assistant do for you if you have a seizure?

What should your assistant do if your catheter becomes plugged?

What should your assistant do if you have an insulin reaction?

What should your assistant do if the battery in your wheelchair is dead?

Under what circumstances should your assistant call your doctor?

What are the emergency evacuation routes for your home/apartment?

Important Phone Numbers

As an employer you are responsible for having a plan to deal with foreseeable emergencies and having that information available to your assistant. Locate the names and phone numbers of the following people or agencies. This information should be kept in a place that is easily accessible to both you and your assistant.

Doctor's Name _____ Phone # _____

Doctor's Name _____ Phone # _____

Vet's Name _____ Phone # _____

(for those with service animals)

Police Phone number _____

Fire Department Phone number _____

Building Manager Name _____ Phone # _____

Cab Company Phone number _____

Back-up Personal Assistant _____ Phone # _____

Family member(s) _____ Phone # _____

_____ Phone # _____

Friend _____ Phone # _____

Schedules

There are many ways to make schedules. Job duties can be arranged in various forms to fill your specific needs. These schedules may seem like a lot of paperwork, but they contribute to the continued success of your employment. They allow you to cover all the needed areas of assistance, and keep track of how many hours your assistant works each pay period. Careful preplanning can maximize your assistive services.

Consider how often tasks need to be done -- daily, several times a week, only once per week, or those that only require occasional attention. Consider how long each task will take. Similar kinds of activities can be grouped together. Tasks that require longer periods of time can be scheduled on alternate days to allow enough time for each without rushing. Activities can be listed on the appropriate day(s) of the week. Some arrange these activities in a grid while others arrange tasks by service areas. Lastly, a simple narrative style allows for an informal description of duties.

Task List

This can either be used to show prospective assistants the routines they will be performing or after hiring, to train your new assistant in daily care.

Time: weekdays: 7 to 9 a.m., weekends 9 a.m. to noon, evenings: 5 to 8 p.m.

Medication: List specific medications and what they should be taken with if needed.

Exercise: Assist with walker three times a week and exerciser once or twice a week.

Meal preparation: Prepare breakfast and supper Mon - Fri.

Housework: Wash dishes and clean up kitchen after each meal.

Transportation: Take to work Mon - Fri, shopping W & Sat, other errands as needed

Hygiene: Bathe every other day. Wash and dry, wash hair in kitchen sink every day.

Transfers: Assist me in moving from bed into my wheelchair, from wheelchair to toilet, and from chair to tub.

Grooming: Dress and undress, comb hair, shave, put on makeup, nail care, clean glasses, prepare toothbrush and washcloth.

Housework: Make bed every day, wash dishes and clean up kitchen after each meal, and other minimal house care as needed.

Wheelchair: check battery, recharge as directed.

Daily Schedule Grid

Tasks	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Personal Care: Dressing							
Bathing							
Transfers							
Hygiene							
Toileting							
Eating							
Domestic Care: Cooking							
Cleaning							
Laundry							
Shopping							
Exercise							
Transportation							
Equipment Set up							
Paperwork/Reading							
Total hours							

Service Area Chart

Service Area	Type	How often	Schedule	How long	Comments
dressing	lay out clothing, help with zippers, etc.	twice daily	8 am, 9 pm	20 min. each	minimal assistance required
meals	plan menu, prepare all	3 x daily	8 am, noon, 6 pm	30 min each	prepare, serve, cleanup
exercise	range of motion: legs and arms, back & neck	3 x daily	before each meal	15 min each	

Narrative Schedule

I broke my neck in a traffic accident 30 years ago and have little movement below my shoulders. I usually use an electric wheelchair which I control unaided, but need assistance getting in and out. I need to take medication at regular intervals throughout the day, but it is in pill form and requires no special training to administer.

I need assistance to get out of bed and into my wheelchair using a sling and overhead hoist. For all meals, assistance is needed with preparing food, cleaning up, and feeding.

I brush my own teeth but need assistance with putting toothpaste onto the brush. I shave, using an electric razor with some assistance. I deal with my mail in the morning. I need the envelopes opened and the correspondence removed but I read my mail. I use my computer to print letters, envelopes, and checks. I need assistance preparing items for signing and sealing envelopes and, at times, with changing floppy discs and general assistance with books and papers for projects I am working on.

I like to go out in my van visiting places of interest as often as the mood takes me. I like to visit my local pub, and sometimes to travel further afield, and need assistance with drinking!

How and Where to Find a Personal Assistant

Look at the resources around you and determine how to reach the kind of applicant you are looking for. Consider where they are likely to live, what newspapers they read, whether they might see posters or job notices, and whether they might consult a disability or employment agency. A student might look on campus, a person who lives in a suburb might look in a neighborhood shopper, etc. Good Luck!

Tell everyone you know that you are looking for a personal assistant. The more people you tell, the more likely you are to get qualified applicants.

How to advertise is as important as where to advertise.

- ▶ Give a brief description of the duties (without being too technical),
- ▶ a telephone number where you can be reached,
- ▶ the number of hours required, and
- ▶ list any needed experience or qualifications (driver's license, medical certification, etc.),

Do not include your address in the ad to avoid having people show up at all hours to check on the job. If you offer any job benefits, emphasize that in the first line of your ad. For example, if you are paying above minimum wage, say so. You should also try to attract attention to your ad, and invite the reader to apply. Put your ad in *Part Time*, *Health Care*, *Household*, *Domestic Help Wanted*, or *Personals* (or equivalent sections your local newspaper or shopper uses). Following this section are several examples of classified ads.

1. Agencies for persons with disabilities

If you live in an area that is served by an independent living center, they may offer information and referral services. This usually involves giving you the names and phone numbers of potential personal care assistants. Some of these referrals will have experience as assistants. However, it is up to you to screen applicants and train the assistant you hire to perform your own care routine.

2. Classified ads in newspapers (local & college, neighborhood shoppers)

Many persons with disabilities feel that placing classified ads is the best way to recruit potential assistants. Contact your local newspapers and compare prices. Some newspapers have discounts for running ads longer and at particular times. In writing your ad, carefully consider what to include. Newspaper space is usually sold by the line, so keep your message short and to the point. Put your ad in *Part Time*, *Health Care*, *Household* or *Domestic Help wanted*.

3. Bulletin boards (apartments, laundromats, shopping malls, grocery stores, city hall, college dorms, libraries, YMCA/YWCAs, etc.)
Posting ads on bulletin boards is a great, free way to recruit assistants. Be sure you write or type the ad clearly, and make sure that the lettering is visible from far away. Place the ad on the board at eye level, so it is easier for people to see. Similar to the ads that follow, a poster could be made for placement on bulletin boards.
4. Colleges and universities
Personal care assistive work is often well suited to college students' schedules. If you plan to have a live-in assistant, the offer of housing in exchange for work may be a good job incentive. College newspapers can help you to reach a large number of potential assistants for very little money. Take advantage of the numerous bulletin boards on campuses.. Colleges that train health care professionals (occupational or physical therapists, nurses, etc.) can be a potential source of applicants. Often these students are looking for practical experience. Finally, call the college placement or student employment office and ask them to post your job opportunity.
5. Local employment office (Workforce Development, Manpower)
Many people who are out of work check for available jobs at an employment office. Call them and ask to list your job opportunity.
6. Senior Citizen groups
Some people with disabilities have reported finding assistants through local agencies that find jobs for retired senior citizens. These agencies differ from city to city, so you may have to call your local Council on Aging, Association of Retired Persons, or other senior citizen group to locate the appropriate agency in your area. A senior citizen may be looking for a way to supplement a pension check and thus be interested in part-time work.
7. Word of mouth
You may be able to get referrals from friends, relatives or other disabled peers. Your peers who have used assistants may be able to make recommendations.
8. Other places to advertise
 - Work wanted ads: Check out the work wanted ads--there may be a potential assistant among them. If people take the trouble to place an ad, at least you know they are willing to work.
 - Newsletters: from hospitals & civic organizations
 - Local cable public access
 - Church bulletins: Church and community groups may also be a potential source of employees. If you are involved with a church, call your minister or rabbi to find out how you can post an ad.

- Other community groups (social, political, volunteer or civic) may also have a pool of potential applicants.
- Internet chat groups or free posting sites
- Support groups or associations

Sample Ads:

<p>Female wheelchair student in dorm seeks help with personal needs. Immediate need for live-in non-smoker. Call Chris @123-4567 for an appointment.</p>	<p>Blind man wishes to hire reader/driver for paperwork and errands. Flexible schedule. Must have own transportation. Call 321-4567.</p>	<p>Excellent position for student includes room and board. Disabled male needs assistant for personal care mornings & evenings. Call Elvis @ 333-4567.</p>	
<p>Want to hire mature part-time assistant for disabled young female for personal care and light housekeeping 3 hours per day. Call Pat @ 936-3785</p>	<p>Need extra money? Become a personal care assistant for female with a disability needing assistance with light housekeeping. Call Mona @ 123-4555.</p>	<p>Free Room and Board Assistant for disabled female to help with personal care and light housekeeping. 5 hrs. per day. Call Cher @ 123-8888</p>	
<p>The following are ads that are should not be used--they focus on the undesirable attributes of the position, use jargon and are unnecessarily limiting.</p>			
<p>Immediate need for person to care for DD adult. Free immunizations as man is hepatitis B carrier. Call Fred @ 333-4545</p>	<p>Share your home with hyperactive 15-year-old boy with traumatic brain injury. Training in handling aggressive behavior provided. Call 123- 4567</p>	<p>Minimum wage position, no benefits. Evenings and weekends required. Includes bathing and catheterization. Call 123- 4567</p>	<p>Round the clock caregivers needed for non-verbal wheelchair-bound MR male. Overnight stays required. Call 123-7890.</p>

How to Screen Applicants

As the employer, YOU are in charge of screening applicants. All applicants should be thoroughly screened before you hire them. This is a very important phase of the process that can help you to avoid problems later.

You will want to identify the best candidates through telephone screening. Many people who inquire about the job will have no idea what they are applying for. Some applicants will not be interested in the job once it is explained to them. There is no need to go into a detailed job description on the phone. Telephone screening is not an interview, but an effective way to screen anyone who lacks the skills, experience, motivation, stability and maturity to do the job. 25-50% of applicants will not show up for the interview.

Give a brief description of the job duties, being sure to mention if the job includes bowel and bladder care and bathing and feeding if these are job requirements. If the person sounds interested get their name and phone number. Keep notes that you can refer to later, if you schedule an interview. If you want, you can get other information at this time such as any relevant job experience, or if they have reliable transportation. There is no point in continuing the discussion if the caller cannot meet your basic requirements.

Thank all applicants for their interest. Even if the person is unsuitable for the job now, they may be useful for backups later. You might even suggest that if they know someone else looking for a job to refer that person to you.

For security reasons, you may not want to schedule interviews in your home. An independent living center might be able to offer you a room to meet with prospective employees. Other places include private reading rooms in your local library (call ahead for availability), empty offices on a local college campus or a fast-food restaurant. It may also be prudent to have a family member or friend present.

Telephone Script

The following is a sample script of how a person with a disability might handle an initial phone screening.

Phone rings

Chris: Hello

Pat: (**softly**) Hi. This is Pat Smith. I saw your ad in the paper and I'm interested in the position.

Chris: Oh, that's great. Can you speak up a bit? It's hard for me to hear you.

Pat: Sure, is that better?

Chris: Yes, that's fine. Do you know anything about assistive care?

Pat: Well, kind of. I have a friend who uses a wheelchair, and I've helped her several times when her regular assistant couldn't be there.

Chris: I need someone for six hours a day, two in the morning and four in the evening. If I can get someone to work for the whole six hours, I'd prefer to hire just one person. But I could split the position, especially on weekends. What hours would you be available?

Pat: Well, I can work either days or evenings, but I'm not sure about both. I don't mind switching from one week to the next, and I'd prefer having every other weekend off.

Chris: Well, that's possible. Let me tell you about what I need. In the morning my assistant would need to help me get up, bathe me, dress me and give me breakfast. This routine involves bowel and bladder care, would you be comfortable with that?

Pat: I can handle that.

Chris: Also in the morning, I need my reading and computer set up, so I can do my work.

Pat: I see. What about in the evening?

Chris: I need my computer shut down and my work put away. Dinner has to be made, served and the kitchen cleaned up. I need to be undressed and helped to bed. Once a week we would do shopping and there is some cleaning. That's the general idea. Do you think you're interested?

Pat: Yes, I think I am. I might be able to work both shifts, but I'd like to think about it.

Chris: Give me your name and address, slowly. I can't write, so I put it on my computer. We'll schedule an interview later this week. Thanks for calling. I'll talk to you later this week.

Pat: OK



Personal Assistant Application

This application is NOT for employment with the center. The information from this form will be shared with people with disabilities who are seeking assistants. The person with a disability is your employer and will do all screening, hiring, disciplining, and firing.

Last Name _____ First Name _____ Maiden Name if applicable _____		Date _____					
Address _____ City, State, Zip _____		Sex [M] [F] Over 18? [Y] [N]					
Phone number _____ Best time to call _____		Smoker? [Y] [N]					
Check all duties you are willing to perform:							
Housekeeping _____ Laundry _____ Mending _____ Driving _____ Shopping _____ Food Preparation _____ Feeding _____	Dressing _____ Bathing _____ Skin Care _____ Transfers _____ Grooming _____ Oral Hygiene _____ Bowel/Bladder Care _____		Reading _____ Exercise _____ Child Care _____ Yard Work _____ Other _____				
Assistant availability (check all that apply) part-time _____ full-time _____ days _____ evenings _____ weekends _____ on-call _____ live-in _____ temporary _____ emergency _____						Wage per hour \$ _____ you require	
Assistant hours available							
	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
6 am to noon							
noon - 6 pm							
6 - midnight							
midnight - 6 am							

Are you willing to work for: Males? _____ Females? _____	Do you have reliable transportation to get to the job? ____ Do you have a valid Driver's License? _____ Do you have auto insurance? _____ How far are you willing to travel? _____
--	---

Education and training

Name of school, college, or university	Dates of attendance	Address	Diploma, certificate or degree

Please list three references (employers, volunteer work, school)--only one may be a family member or friend.

Name	Address	Phone Number	Relationship
------	---------	--------------	--------------

Name	Address	Phone Number	Relationship
------	---------	--------------	--------------

Name	Address	Phone Number	Relationship
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List any skills, education and/or certificates which would qualify you for the position of personal care assistant.

List any specific disabilities that you have experience with (blind, deaf, paraplegia, Alzheimer's, etc.)

List any physical or health limitations (allergies, weight-lifting limitations, etc.) that might prevent you from performing the duties of the position.

Have you ever been convicted of a crime? If so please explain.

Work History

Name and Address of Employer	Duties	Employed
Supervisor: Phone #	Reason for leaving:	From: To:
Supervisor: Phone #	Reason for leaving:	From: To:
Supervisor: Phone #	Reason for leaving:	From: To:

I hereby certify that all statements made in this application are true to the best of my knowledge and that I have made no omissions of pertinent information. I consent that my employer may obtain information from any person or organization which I listed above as a reference. I understand that the Central Iowa Center for Independent Living is NOT an employer or an employment agency. Salary, employment hours and other conditions of employment are to be negotiated between the assistant and the employer (the person with a disability).

Applicant Signature _____ Date _____

How to interview an applicant

The next task in the process of finding and hiring an assistant is to go over the information on each applicant and select those most qualified. These applicants can then be invited to a face-to-face interview, one at a time. If possible, schedule as many qualified applicants for personal interviews as you can. Do not schedule interviews so close together that you have one applicant waiting while you are still interviewing another. If the interviews are too close together, it can be mentally and physically exhausting. It may become confusing, so take notes, have someone assist you, or tape record interviews so you can keep applicants straight.

When inviting applicants for a personal interview, give directions with landmarks (the green building three doors up from McDonald's). Tell them if it's necessary to ring the bell several times to allow you time to get to the door or if they need to be buzzed into the building. Ask them to bring the names and addresses of two work references and a personal reference and any additional required materials such as their Social Security number or driver's license.

For security reasons, you may not want to interview applicants in your home. An independent living center might be able to offer you a room to meet with prospective employees. Other places include private reading rooms in your local library (call ahead for availability), empty offices on a local college campus or a fast-food restaurant. It may also be prudent to have a family member or friend present.

It is not recommended that you hire at the end of the first interview. Ask the applicant to call back at a pre-arranged time. This is their first test of responsibility. If they don't call back at the set time, then they are probably not responsible enough to meet your needs.

An interview allows you to assess the skills of the potential assistant, to inform the candidate of your specific needs, and to assess how your personalities may work together. Don't be afraid to ask probing questions--the assistant will be in your home, performing intimate tasks, so you need to ask important questions.

Interview Questions

If you have difficulty writing, consider taping the interview.

Why are you applying for a position as a personal assistant?

Do you have any experience with disabled and/or elderly individuals?

Tell me about your previous jobs

How long did you work there?

What part of the job did you like the most?

the least?

If hired, how long would you plan to hold this position? _

Are there any duties of a personal assistant that you are uncomfortable with or unwilling to do? _____

What hours are you available? _____

Do you have any other responsibilities that would interfere with being an assistant?

Do you have experience in cleaning? _____ preparing food? _____
laundry? _____ grocery shopping? _____

Could you provide transportation to take me to work, doctor's appointments, etc.?

Do you have a valid driver's license? _____

Do you have any allergies to pets? (If you have pets) _____

Are you a citizen of the United States? _____
(If not, make a copy of their green card.)

If hired, when could you start? _____

What would you do if you had problems performing any of the duties I require?

How did you get along with your past employer(s)?

Can you transfer someone from a wheelchair into a car or onto a bed?



How to Select an Assistant

The decision to hire one applicant over another is made entirely by you, the employer, so take some time to review each application. You exercise final control over which applicants are competent to provide you personal care. When selecting personal care assistants, do not expect a long-term relationship, but do expect dependable care.

Describe to yourself precisely the type of individual you want as an assistant. Factors can include age, sex, occupation or student status, desirable personal traits, and whether you require experience. Evaluate how each candidate meets your expectations. Sometimes you don't have a wide range of choices. You may have less-than-perfect candidates. What minimum requirements are you willing to settle for? Is it more important for you that the applicant has previous experience, or can you train them? Do you need someone to start immediately, or could you continue to search for an assistant? These are issues you need to consider carefully. Give yourself the time you need to prioritize your thoughts. Make good choices--the consequences are important.

Make sure you check all the applicants' references. Sometimes information gathered in a reference check will verify the impressions you received in the interview. A reference check will give you the benefit of others' perceptions of the individual. Use the reference check form to contact previous employers about dependability, performance, and other job-related skills.

Be cautious if the person has no work experience or does not list any work-related references. The applicant may have listed many personal references, but these people may not know very much about the applicants' work performance.

Given today's job market, an assistant may not necessarily meet your expectations of what a "perfect" employee should be. Personal care assistance is difficult and undervalued by society. Wages and benefits have traditionally been low, with no room for advancement.

When looking for an assistant, you may not have the luxury of finding someone knowledgeable about your particular disability. Do not disregard a person with limited experience who is genuinely interested. Lack of experience can sometimes be favorable, since the assistant may be more open minded. In contrast, a person with prior experience may have preconceived notions about how to handle your daily cares, assuming you want things done exactly like the last person they worked for. Hiring an inexperienced person allows you to train them specifically to your

needs. The training period may be longer but the end result can be more desirable.

If you receive no qualified applicants, you may have to reconsider your job description. Are there some aspects of the job that you could change? Fewer hours, more pay, perks or relaxed dress code. Evaluate why you did not like the candidate. You do not have to approve of the way they dress, their lifestyle, boyfriend, religion, or hair color to value their services as means to achieve your independence. Keep looking until you find someone who meets your needs.

When you have decided be sure to call the other applicants and tell them you have hired someone else. You may wish to ask qualified applicants if they would be interested in working as an emergency back-up. It's a good idea to keep their applications on file, because it may save you time in the future.

What impression did you receive during the interview? Some aspects of the interview may raise red flags. Were they guarded or hesitant in answering certain questions or were their replies open and sincere? What was the candidate's tone of voice--pleasant or condescending? Did the candidate state answers in a confident straight-forward way or did they seem to tell you what they thought you wanted to hear? Did the candidate make you feel comfortable that they could handle all aspects of the position?

Emergency Assistants

No matter how dependable your assistant is, there will be times when they will have to miss work. It is highly unlikely that one assistant will be available to work 365 days per year. Even when you have an employee that you are satisfied with, it is a good idea to be prepared for the time when your regular assistant wants to take a vacation, is ill, has a family emergency, or transportation or weather problems. By coming up with creative solutions to problems, anticipating changes in schedule, and planning ahead you can avert disasters. Putting aside a vacation day for emergencies is a good idea. Having alternative plans made ahead of time can pay off.

Developing an emergency back-up system allows you to remain in control. Keep the names and phone numbers of people you can call upon to fill in for your assistant. (See the form that follows.) Back-up assistants may be:

- ▶ former assistants,
- ▶ applicants who were not hired but seem qualified,
- ▶ family members,
- ▶ friends,
- ▶ neighbors, or
- ▶ co-workers.

By being prepared, you never have to hire a personal assistant out of desperation. Keep your list of backups current, periodically checking to see if the individuals are still available. These backups might come in once or twice to familiarize themselves with your routine.

Some consumers employ more than one assistant at a time. You may want to hire one for mornings, one for afternoons and one for evenings. This arrangement gives you a built-in backup system with three people who know your routine. If one assistant is unable to work, the other may be able to trade shifts or fill in.

You may have to skip non-essential activities to get basic needs met. Having a list of alternate assistants also allows you to terminate an assistant should it be necessary without the fear of being unable to find a replacement immediately.

Agencies like visiting nurses and home health associations can also be called upon, but their services are likely to be expensive. In addition you may want to cultivate relationships with restaurants and grocery stores, who might deliver groceries or food in an emergency. You may not want to use these services on a regular basis due to cost, but in an emergency they may be essential.

Emergency Back-up List

Name	Address	Phone	Experience	Hours available	Comments
Jane Doe	1234 Oak	243-1256	driver, shopping, meal prep	am only	own car, son in kindergarten

Compensation

Taxes

An employer must generally withhold income taxes, pay social security and Medicare taxes, and pay unemployment tax on wages paid to an employee, but not to independent contractors. Health aides are considered your employee.

You are liable for taxes if:

- the worker must follow your instructions,
- you control the details of how the work was done,
- you provide the training, or
- you set the hours and schedule.

A contract employee is an independent contractor if:

- you pay them by the job (not by the hour),
- you do not provide benefits,
- the relationship is for a short period of time (not indefinitely), or
- they work for more than one person, (not just you).

If you employ a personal assistant you should verify that your household insurance covers household employees in case of an accident. You also have a legal responsibility to pay taxes for household employees under certain circumstances. As of 1996, if the caregiver pays more than \$1,000 to a household employee in a calendar year, you are required to withhold Social Security taxes of 7.65% and file with the Internal Revenue Service annually. The employee is required to pay an additional 7.65%. Employers may report the worker's wages and tax liabilities on their annual 1040 form. For information on paying federal taxes for household employees, call (800) TAX-FORM and ask for Publication 926 which explains specifically about household employees. The employer will need a W-2 form to file at the end of the year and a copy of the form should also go to the employee. A W-3 form is also required if an employer has more than one household employee and is filing more than one W-2 form.

Pay Rates

Pay rates vary from consumer to consumer. For a guideline of competitive rates, see your local independent living center or talk to peers who hire assistants. Some consumers give a raise for satisfactory performance or annually on an anniversary date. Some give bonus pay or paid time off for perfect attendance. Some pay for the assistant to attend a training workshop.

Some consumers pay a varying rate depending on the task, the experience or skill level of the employee, the time of day, or the event. They might pay a differential for evening work, or for more difficult tasks. Others pay by the job, which encourages assistants to not perform tasks slowly to prolong the job. Those who hire drivers generally pay a mileage rate only while they are in the car. (Portal-to-portal only) Mileage rates vary, as

do hourly rates. Don't be afraid to negotiate pay rates.

Perks

Perks are benefits or special consideration that you give, usually in place of money, that help make the job more attractive or desirable. Consider what kinds of perks you can offer an assistant. Perks can be incentives for good employees to stay in your employ longer.

Consider what kinds of perks you can offer:

- a meal during work day
- flexibility of work hours
- use of your vehicle
- their birthday off, or letting them leave a few hours early
- reimbursement for transportation (gas or cab fare), or
- tuition for training or certification classes

Think about those things you can realistically afford or those which will not keep you from getting a task completed that is really important to you.

Payment may be in cash, barter or a combination of these, depending on the resources you have available to you. Some disabled persons use creative methods of payment to afford the assistive services they require. These options include trading room and board, or some individual service or product that you can supply.

Some persons with disabilities cover assistant fees during travel by splitting an assistance during conferences or out-of-town trips. Wages can be negotiated in special instances to not include an hourly rate or be prorated during unusual circumstances.

Some assistants may be happy that you show a personal interest in their life--a treat on their birthday or a card on Mother's Day. Don't forget that everyone loves to hear praise. "I don't know how I'd get along without you!"

Legal/Insurance Issues

Any personal assistant coming into your home should be insured against:

- any harm they may cause to you or to your belongings
- any harm the personal assistant may cause to your property
- any harm that may happen to them while they are working for you

Call your insurance agent to make sure you have coverage on your house and car if your personal assistant uses it to transport your loved one.

Employment Contract

This is a legally binding document. Be sure you understand everything in this contract before you sign it.

The assistant will perform the following services for the person with a disability.

Activities include, but are not limited to:

(Housekeeping) _____ (Transfers) _____ (Transportation) _____

Assistant will be supervised by and is wholly responsible to the person with a disability. The person with a disability will not expect the assistant to stay past the agreed-upon time _____ except in emergencies.

Assistant will respect the confidentiality of the person with a disability.

Assistant will complete duties by the agreed-upon time.

Assistant will be on time.

Assistant will work on (Mon Tues Wed Thurs Fri Sat Sun) from _____ to _____. The person with a disability will pay the assistant an hourly wage of \$_____ or a weekly rate of \$_____. Payment will be _____ (monthly, weekly).

Salary does **not** include paid vacation or sick leave.

Weekly hours will total _____ but are not to exceed _____.

Room and board (are) (are not) included. Utilities (are) (are not) included. Laundry (is) (is not) included. Long-distance phone calls are **not** included.

Smoking (is) (is not) acceptable.

Transportation with or for the person with a disability will be reimbursed at the rate of \$_____ per mile if the assistant uses their own vehicle.

In an emergency, the person with a disability and the assistant will notify the other as soon _____ as possible.

_____ number of absences and/or tardies will result in termination.

Assistant will be notified _____ times of unacceptable behavior before being terminated, unless such behavior endangers the person with a disability's health or safety, in which _____ case the assistant will be terminated without notice.

Each party will give two weeks notice before terminating this contract.

The employee is working as an independent contractor, and is solely responsible for keeping adequate records and making tax and other payments related to contract. Assistant acknowledges that no money will be withheld by the employer for payment of assistant's local, state, or federal tax obligation.

Signature of the person with a disability _____ Date _____

Signature of the assistant _____ Date _____

Time Sheet

Pay Period _____ to _____

Day	Date	Tasks Completed	Total hours
Sun			
Mon			
Tues			
Wed			
Thurs			
Fri			
Sat			
Total hours for the first week _____			
Sun			
Sun			
Mon			
Tues			
Wed			
Thurs			
Fri			
Sat			
Total hours for the second week _____			
Grand Total of hours for two week period _____			

Signature _____ Signature _____
Employer Assistant

How to Train an Assistant

The training program is a critical component in personal care management. It is crucial that you acknowledge the responsibilities you have in this relationship, including being organized. The contract, checklists and feedback training are all there for your protection. These tools may seem like a lot of paperwork, but they all contribute to your continued success in hiring, training and managing reliable, conscientious assistants. Even if the individual you hire does not stay in your employ, this working relationship will give you valuable skills that you can use to hire other personal care assistants.

Try to create an environment in which the best traits of the personal assistant will flourish, a work setting which is conducive to a productive work relationship. It may not be easy to establish good communication skills, but time invested now will pay off in an assistant who is motivated to work for you. A happy assistant will stay with you longer and do a better job. It is your job to supervise--not command.

Think of yourself as the owner of a small business. You are a supervisor of one or more workers, and a manager of scarce time and money resources. Personal care management may seem complicated, but with some planning and perseverance you can do it. Other persons with disabilities effectively hire and manage personal assistants and you can too.

Be ready to communicate job activities to your assistant along with the time of day specific tasks are to be completed. Everyone learns differently so do not rely on only one method of interaction with your employee. Do not end up on the floor because you assume your assistant knows how to do a transfer.

First Day Orientation

Give a tour of the house in which you explain where the supplies are kept, how to operate appliances, assistive aids, the heating/air conditioning, locks, etc. Declare parts of the house off limits that are not involved in your daily care.

You may want to tape record descriptions of your routines to train assistants. Be brief, but put the steps in correct order. Make sure the assistant knows what materials are needed and when and where the job will be performed.

If possible, schedule time for your new assistant to observe specific procedures before your previous assistant leaves. It helps greatly if your new assistant can watch the procedure the first time without the pressure of performing. A three-step process of 'Watch One, Try One, Solo One' is usually successful. You explain it, the new aide tries the routine (with assistance from the experienced aide, if

needed), and then the new aide goes solo with your coaching. Periodically during the training, take time to stop and ask the assistant questions to assess their understanding of the procedures. Do not expect an assistant to understand perfectly how to perform routines the first time. Repetition and practice are necessary before you can work as a team. Errors during training are usually due to your assistant's unfamiliarity with your personal care routine. If possible, make a video of your routines being correctly performed for use in training future assistants.

Investing time and effort in the teaching and coaching of a new assistant can pay off in the long run. Training a new assistant, even someone with experience, will take a minimum of two to six weeks.

Setting up a good working relationship with your assistant starts with making your expectations clearly understood from the beginning. The training period is the time to lay important ground rules for the behaviors you want and the tone you want the relationship to take. The process of training someone else involves patience, and the ability to break tasks down into small easily understood units that can be communicated to another person.

Have the assistant review the checklists and ask questions about any duties they are unsure of. Checklists cannot provide all the details about how a particular task should be performed. It is your responsibility to give clear directions with both verbal and written instructions to make sure that the assistant knows exactly how you want the job done.

Importance of Routines

An important part of your assistant's job may be to return equipment or furniture to places where they can be easily reached, or ensuring that pathways remain uncluttered. Help your employee realize that if furniture is moved without your knowledge, it may mean that you are no longer able to transfer into that chair without help. If furniture or equipment's positions in your home or office help determine the degree of independence you experience, make it clear to your assistant from the beginning that they must be careful.

Evaluations

Setting up a schedule of regular evaluations gives you an opportunity to reward good performance and to improve on poor performance. A two-day trial period lets both of you know if the situation is going to work out. The first evaluation can be done at two days, then six weeks, six months, and then annually. During an evaluation you can also ask for assistant input on what parts of the job they like or dislike, and what suggestions they have to improve their service.

Assistant Evaluation Form

Name of Assistant _____ Date _____

- 1. arrives for work when scheduled
almost always 1 2 3 4 5 almost never

- 2. follows directions
almost always 1 2 3 4 5 almost never

- 3. performs routines accurately
almost always 1 2 3 4 5 almost never

- 4. maintains open communication with employer
almost always 1 2 3 4 5 almost never

- 5. treats consumer with courtesy and respect
almost always 1 2 3 4 5 almost never

- 6. respects consumer's choices and preferences
almost always 1 2 3 4 5 almost never

- 7. maintains confidentiality of consumer's information
almost always 1 2 3 4 5 almost never

- 8. is conscientious in performing routines
almost always 1 2 3 4 5 almost never

- 9. responds well to constructive criticism
almost always 1 2 3 4 5 almost never

Comments: _____

How to Manage Your Assistant

Handling Conflict

Personal Care Assistants who quit usually say that lack of communication was their primary reason for leaving. It is important to share your reactions to your assistant's behaviors. By remaining silent and masking feelings both may be unaware of the effect their actions have on the other. Petty irritations and misunderstandings destroy what could be a productive working relationship. Should you have a difficulty with your assistant, every effort should be made to discuss the problem. Give the assistant the opportunity to react to feedback about their work performance. Before small irritations build up into angry explosions, talk about them as soon as possible. Compromise and negotiation are important management skills. Help your assistant realize the importance of their job, and that you value their skills.

Following are some suggestions for clearing the air:

1. Describe the other person's actions, don't label, accuse or insult. Avoid making it a personal issue.
2. Define the conflict as a mutual problem to be solved, not as a win/lose struggle.
3. Be specific in defining the conflict and give possible solutions that consider both sides.
4. Talk to your assistant about how you feel, and listen actively to their feelings. Let your assistant know that you respect their feelings. You are allowed to make mistakes, and so are they.
5. Discipline tactfully. You want to maintain a constructive dialogue rather than communication that causes resentment and defensiveness. Tactful discipline is fair, private, without anger or accusations.

Listening skills

- Listen consciously *without interrupting*.
- Don't think of what you are going to say next while you are listening to the other person. If your thoughts are about what you want to say next, you are not really listening to the one who is speaking with you.
- Be open and willing to share your own feelings, emotions and viewpoints.
- Hold discussions in a quiet space at a time when your assistant is most capable of communicating. Acknowledge the receiver's feelings and viewpoints.
- Provide truthful, accurate information to the receiver. Don't beat around the bush trying to spare them. Half truths or making promises that you do not intend to complete serve no one.
- It is up to you to modify your own listening behavior, not the other person.

If an assistant forgets to do something or does it unsatisfactorily, take the initiative to clarify it. A person who makes mistakes sometimes believes that they were acting correctly. The problem might have occurred because the instructions were unclear or misunderstood. Open communication and clear instructions are key to successful personal care management.

A good or bad relationship with your assistant depends to an extent on the mix of values, habits, and personalities of both you and your assistant. Conflict can arise if your values don't mix with those of your assistant. Decide before you hire if you can put up with a smoker (if you don't), someone who drinks socially (if you are a teetotaler), someone who curses (if you feel strongly about foul language), or someone with strong religious or political beliefs (that don't match yours). By setting limits on certain social behaviors you can forestall problems and work toward a more effective and longer lasting working relationship with your employee.

Feedback/Constructive Criticism

The most important part of managing assistants is providing feedback--both praise and constructive criticism. Research has shown that job performance improves and remains high when employees receive positive feedback on jobs they perform well. The training period gives you an opportunity to solve small problems before they become too big.

Feedback makes the assistant more aware of what they do and how they do it. Constructive feedback can be provided by following these guidelines:

1. Give feedback as soon as possible after the problem occurs. Prompt feedback is essential--let your assistant know how they are doing immediately after an activity.
2. Be specific Explain specifically what parts of the task were done well, what needs improvement, and how to improve their performance.
3. Don't bring up incidents from the past. Deal with each issue as it occurs.
4. Give feedback to provide information, not to criticize. Keep comments short and to the point.
5. Every time you give a person accurate feedback, you have an opportunity to build trust.
6. In preparing to give feedback, stop and reflect on the content of the feedback. Do you really understand the situation?
7. Balance praise and criticism. When you are giving criticism, don't forget that the employee is often working hard and making many valuable contributions. Mention them first.
8. Focus on the performance, not the person or the personality. Rehearse your message, repeat it to yourself at least once before delivering it.

Positive Reinforcement

If you like the way a meal was prepared or if a task was especially well done, be sure to thank your assistant. Honest appreciation of services rendered is appreciated by everyone. The more specific the praise, the greater the impact. Examples of positive reinforcement would include:

“You did a really great job of _____ today.”

“You did such a good job at _____, it will make my day go easier.”

“I really appreciate all your hard work.”

It can be difficult to give negative feedback, especially if you have to give this feedback to someone you depend on. Try hard to think about the consequences of not giving feedback. It may mean that you continue to have your needs unmet. Honest criticism in an even tone can help your assistant to better serve you.

No one learns much by hearing “You did a really bad job today.” If the assistant performs only one part of a task incorrectly, it is a good idea to mention first what was done correctly. “You did a good job on my bath today. Next time use more shampoo.” or “The kitchen looks great. Don’t forget the pots on the stove.” Point out positive aspects as well as areas that need improvement.

Unrealistic expectations

A person with a disability was complaining about their assistant not being a low-fat cook, not cleaning the antique furniture properly, and not being a spotless housekeeper. While it may be realistic to expect the assistant to keep you in toilet paper, it is not reasonable to expect them to polish your silver. An assistant is not a maid, a nutritionist, a doctor, or a spouse. No assistant can be expected to perform your routines perfectly every time.

Warnings

Try to agree on a solution to any problem that will resolve the conflict and maintain a good working relationship with your assistant. If that is not possible, it may be necessary to issue your assistant a warning. The assistant should be notified that there is a problem with their performance within a specific time-frame to correct the problem. While feedback can be used to handle most situations, there may be times when the assistant needs to be corrected more firmly. If the assistant continually performs a task incorrectly that they should know how to do, or when they are testing you to see what you will let them get away with, a warning may be the only alternative. Describe the problem and your expectations. Consequences for unmet expectations might include a verbal warning on the first offense, a written warning on the second offense, and termination on the third offense.

A verbal warning might be: "You've been late twice this week. I expect you to be on time tomorrow. If not, I'll have to dock your pay." A written warning can be as simple as: On this date (assistant's name) received a written warning about (describe unsatisfactory behavior). Give the consequences of failure, sign and date.

What Would You Do If?

The following is provided as an example of a problem that may come up in your relationship with your assistant. Possible solutions are given that are suggestions. It is up to you to make your relationship with your assistant as open and trusting as you can, by whatever means are at your disposal. People who are treated honestly and openly will often respond in kind.

Situation: A disabled employer needs their assistant to stay an extra hour to help cook dinner. Cooking was not a duty agreed upon in the initial job interview.

Solution 1: Employer does not ask the assistant to stay, but eats cold cereal for dinner. If this is a passive response, the employer may feel resentful and take it out on the assistant. However, if this does not bother the employer, it might be an adequate or temporary solution.

Solution 2: Employer blows up and demands that the assistant stay to prepare the meal. In the outburst the employer brings up grievances from the past. This will probably cause the assistant to become angry and humiliated.

Solution 3: The employer states that although cooking had not been agreed upon, this service is needed from time to time. A discussion is initiated to renegotiate the original work agreement and hours. The employer asks that the assistant stay the additional hour to cook dinner on that day and offers extra pay or cab fare. The assistant is thus allowed to make the decision based on their needs. There is no cutoff in communication and no hidden grievances.

What would you do if . . . ? The goal is to interact with your assistant fairly while still getting your needs met. Standing up for your rights as an employer takes practice.

- ▶ Assistant refuses to dress the person with a disability in the outfit of choice, claiming it is too much trouble.
- ▶ A person with a disability wants to go to bed later than their assistant who shares the apartment.

In any relationship it is important to assess the possible consequences of your actions. Sometimes you may choose to ignore a comment or action because the end result is not important. Perhaps you decide that the torn jeans your assistant arrives in are not as important as the fact that she arrived on time. You do not have to

approve of your assistant's lifestyle, boyfriend, religion, or hair color to value their services as means to achieve your independence.

If an employee objects to doing certain chores you may be able through negotiation to trade one task for another, change schedules or swap duties with another personal assistant. Both parties should come out of the negotiation feeling it was fairly handled. Everyone may not get everything they want, but if both feel that they were treated fairly, this may lead to an acceptable solution.

Ending the relationship

Specialists in employee management urge you to never fire an assistant in anger. However, if the assistant's behavior endangers your health or safety, the assistant should of course be terminated without notice. Otherwise, be sure that you have thought out the reasons for dismissal and what backup arrangements can be put in place before you initiate a termination. If you are concerned about your safety, you may wish to have someone present when you dismiss the employee. Collect all keys and change locks if you feel in danger.

Reasons for dismissal might include:

- drug or alcohol abuse,
- physical abuse,
- sexual harassment,
- general misconduct: breaking house rules such as no smoking, unauthorized phone use, etc.
- poor performance: repeated warnings about incorrect procedures, excessive tardiness, or absenteeism.

You have the responsibility to give the assistant two weeks notice of your plans to terminate their services. If you have given consistent feedback about problems all along, termination should not come as a surprise.

Questions to ask yourself when thinking about termination include:

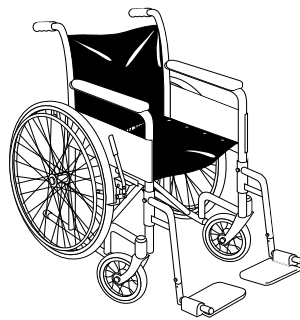
- ✓ Does your assistant follow your directions?
- ✓ Does your assistant interfere with your daily activities?
- ✓ Do they run your life?
- ✓ Would you be relieved if they were replaced?
- ✓ Does your assistant consistently show up late or not show up at all without calling?

Due to long hours and low pay, you will probably be hiring and training new workers regularly. Make it clear to all newly hired assistants that you expect at least two weeks notice if they decide to quit. Make sure the assistant who is leaving has

returned all keys (house, vehicle, mail box). Under the right circumstances, the assistant who is leaving may be willing to work as a backup or provide training for your next employee. Don't take a resignation personally. Your assistant may be just ready to move on.

Ending the relationship with your assistant can be the opportunity to improve your assistant management skills by evaluating what went right and wrong. When an assistant resigns, conduct an exit interview to determine what the assistant felt was good and bad about the position, and to solicit recommendations on how to make improvements. This may help you to recognize and correct problems before they cause irreparable damage in your next working relationship.

Once you hire an assistant, you never know how long they will stay with you. There is no benchmark that represents an official guide to assistant longevity. Many aides are in transition from one time of life to another. The successful management of your personal care is an ongoing process that will usually be in a state of change. Don't get discouraged when things don't work out. Assistant management is a delicate balance of authority, responsibility, and friendship that must be fine tuned over time as people and conditions change. The bottom line must be your safety, physical and mental health, and your independence.



Safety and Security Issues

A good assistant can substantially increase your independence. However, not all assistants are honest. There are a lot of disincentives to working as an assistant such as low pay, few hours, no benefits, and few opportunities for career advancement. In some cases, persons with disabilities are viewed as easy prey. This is especially true in situations where assistants are handling your money, using your vehicle, or buying and/or dispensing medication. While there is no way to absolutely ensure that you won't become a victim of theft by your assistant, here are a few common sense steps you can take to minimize the risk:

1. **Screen assistants thoroughly.** Never hire someone until you have had an opportunity to check their references. If they have worked for other consumers, it's a good idea to call those consumers to see if they had any problems with the assistant. Call the Iowa Division of Criminal Investigation (515) 281-5138 to access Iowa criminal background information. The Dependent Adult Abuse Info number is 800-532-3213.
2. **Never leave valuables lying around.** The most commonly stolen items are jewelry and money. Always lock your valuables in a safe place. Most consumers suggested keeping your money with you at all times. Money can be carried on the front of your chair so you can watch how much the assistant removes for requested purchases. Keep your money, checkbook, keys, credit card, medications and other valuables in a hidden place or lock them up if necessary.
3. **Keep track of your medication.** Always keep your medication locked up when you don't need it. Keep track of how much medication was ordered and how much you use. You can mark on the calendar when you should be out. One alternative is to have your pharmacy deliver your medication rather than letting your assistant pick it up. Or, only buy the amount of medication you'll need for a two-week period. A lower amount of medication is easier to track. Mail order is another way to keep medications under your control.
4. **Avoid letting your assistant write checks or withdraw money for you.** One of the easiest ways for assistants to steal money is to forge checks. Never give assistants access to your checkbook or bank cards when you are not around. If you must let them write a check, give them one at a time, and make sure they bring back a receipt for the amount of purchase. Better yet, have things like groceries delivered, or go to the store with your assistant. Finally never get a joint checking account with your assistant, because legally they can withdraw money from your account without your knowledge and not have to pay it back. Use direct deposit or automatic payments to reduce the amount of exposure to your accounts by the assistant. Direct deposit minimizes your assistant's contact with your money. One consumer suggestion was to have a special errand purse with only the amount of money needed for purchase.

The assistant then purchased the item and left the receipt in the purse.

5. **Never give your credit card to your assistant to use.** A credit card is one of the simplest ways an assistant can abscond with your funds. Your assistant can make purchases, sign your name and be in the next state before your bill comes and you realize what has happened. Remember, your credit card is like cash--keep it protected!
6. **Avoid letting your assistant use your property for their personal use.** Some survey respondents reported that their personal property was the means through which the assistant cost them money. This can include the use of your phone, vehicle, or property. If you have a live-in assistant, make sure you set up guidelines about long-distance phone calls, the use of your vehicle for the assistant's personal trips, sharing of food, etc.
7. **Be sure to get your keys back when an assistant quits or is fired.** Many people with disabilities must provide their assistant with a key to their home. When an assistant leaves your employ, make sure they turn in their keys **before** they receive their last paycheck. If they don't, have your locks changed immediately. Have all issued keys stamped with DO NOT DUPLICATE on them if possible. Keep track of vehicle keys and make sure they are returned every time.
8. **Maintain a watchful eye on your property.** From the first day, let your assistant know that you will be keeping track of medication, vehicle mileage, phone calls, etc. Let them know that you will be auditing the checkbook. Parts of the house that are not involved in your daily care should be declared off limits. In your contract with your assistant, make it clear what will happen if they are caught stealing. Running your assistive services in an organized, business-like fashion may deter assistant theft. Know your neighbors and decide which ones can be relied upon in an emergency. Open an account with the cab company so you do not need to entrust your assistant with cash.
9. **Have a friend or family member drop by unannounced.** If your assistant knows they may be monitored at a moment's notice, you may remove temptation from their path.

With these suggestions you may be able to avoid assistant theft. However, if you think you are a crime victim, confront the assistant to get their side of the story. Perhaps the item is only misplaced or out of sight. If it is clear that they took something, call the police. If you are afraid that the assistant will harm you, let the police know. Some employers of assistants said that they let petty theft go on because they were afraid they would not be able to find a new assistant. Do not remain in an abusive relationship with a person YOU employ.

Rights of the Person with a Disability

The person with a disability has the right to:

- be treated with courtesy, dignity and respect.
- interview, screen and select an assistant appropriate to your needs.
- select and assign the specific duties with which you need assistance.
- train assistants to assist you by using methods which are safe, efficient and that you prefer.
- schedule assistants on a schedule that enables you to meet your educational, career and other responsibilities.
- maintain control over the quality and dependability of assistance which you receive.
- receive the respect due as an individual who is fully capable of recognizing your needs, making decisions, and managing the physical assistance your individual body requires.
- decide what course of action and goals are most appropriate for you.
- privacy from your assistants for your personal beliefs, relationships, values, and activities regardless of the required physical presence of the assistant.
- have personal, financial, and medical information kept private.
- security of your living quarters, personal possessions, food, medications and financial assets.
- live life with the degree of independence you choose, and
- hire, discipline, and fire assistants who do not respect these rights.

Rights of the Assistant

The assistant has the right to:

- receive accurate and pertinent information about your medical condition as it relates to your care.
- receive a well-defined set of duties and schedule and appropriate advance notice of additional duties or schedule changes.
- receive clear step-by-step instructions for accomplishing duties.
- be instructed in the methods that are organized logically and are time and effort-efficient.
- be provided proper equipment and supplies which are appropriate for performing assigned duties.
- perform duties in a pleasant and sanitary working environment which has an efficient physical layout.
- refuse to perform certain duties such as any immoral or illegal task.
- receive, respect, confidentiality, and dignity as a person with specific personal beliefs, relationships, values, and activities.
- receive both appreciation and monetary remuneration commensurate with the extent and quality of duties performed
- make genuine mistakes, and to be treated with respect and dignity when mistakes occur or other corrections are necessary,
- have a workplace free of sexual harassment, and
- resign with appropriate advance notice.

We wish to thank the many consumers and providers of personal assistance services for their suggestions, input, and insight that have added important information to this latest edition. The following centers for independent living provided literature about personal assistive services:

Access to Independence, Madison, WI
Center for Independent Living in Central Florida, Winter Park, Florida
Fox River Valley Center for Independent Living, Elgin, IL
Grand Rapids Center for Independent Living, Grand Rapids, MI
Independence Associates Center for Independent Living, Brockton, MA
Independence Associates, Inc., Taunton, MA
Independent Living Center of the Hudson Valley, Inc., Hudson, NY
Independent Living Center of Mobile, Mobile, AL
Independent Living Resource Center, Albuquerque, NM
Independent Living Resource Center, Santa Barbara, CA
Independent Living Services of Northern California, Chico and Redding, CA
League of Human Dignity, Omaha, NE
LIFE Center for Independent Living, Bloomington, IL
Long Island Center for Independent Living, Inc., Levittown, NY
Metropolitan Center for Independent Living, St. Paul, MN
The Research Center on Independent Living, University of Kansas, Lawrence, KS
Southwest Louisiana Independence Center, Lake Charles, LA
Springfield Center for Independent Living, Springfield, IL
Three Rivers Center for Independent Living, Pittsburgh, PA
Walton Options for Independent Living, Inc., Augusta, GA
Westside Center for Independent Living, Inc., Los Angeles, CA
Wyoming Independent Living Rehabilitation, Casper, WY

Also paraphrased are:

“1998 Instructions for Household Employers”, Internal Revenue Service
A Do-It-Yourself Guide to Self-Assessment For Persons With Disabilities, by Ross Cowman and Bob Watson,
Gateshead Personal Assistance Pilot Project, Gateshead Council on Disability, London, England,
Web Site: <http://www.independentliving.org>
“The Art and Science of PCA Management” by Tony Young, *Mainstream*, Sept. 1986
“The Care and Feeding of Personal Service Assistants” by William Rush, *On the Level*, newsletter of the
League of Human Dignity, Lincoln, NE, July-August 1999
“Employer’s Supplemental Tax Guide” Publication 15-A, Jan. 1999, Internal Revenue Service
Hiring Home Caregivers by D.H. Susik
Independent Living with Attendant Care: A Guide for The Person with a Disability by Mary Ann Board, et. al.,
Institute for Rehabilitation and Research, Houston, TX
“Managing Your Own Care” by Alfred DeFraff, *Accent on Living*, Fall 1989.
“Personal Assistance Services Guide” by Marilyn Hammond, et.al., Utah Assistive Technology Program
“Self-Managed Versus Agency-Provided Personal Assistance Care” by Jane Prince, Scott Manley and Gale
Whiteneck, American Congress of Rehabilitation Medicine and the American Academy of Physical
Medicine and Rehabilitation
RainmakerThinking, Inc., Web Site:
http://www.workforceonline.com/archive/article/000/22/63.xci?topicname=management_fundamentals

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PAS Training Evaluation

Date _____ Location _____

	Poor	Fair	Average	Good	Excellent
	1	2	3	4	5
Content					
Preparation and Knowledge of Presenter	1	2	3	4	5
Presentation Style	1	2	3	4	5
Quality of handouts	1	2	3	4	5
Overall value of workshop	1	2	3	4	5

Did this presentation meet your expectations? Yes ___ No ___

Which parts of the presentation were most useful?

What did you feel was lacking or inadequate in this presentation?

Other comments: