

TAKING CHARGE

A Hands-on Guide
to Personal Assistance
Services (PAS)



Ohio Developmental
Disabilities Council

www.ddc.ohio.gov

It is the mission of the Ohio Developmental Disabilities Council to create change that improves independence, productivity and inclusion for people with developmental disabilities and their families in community life.

Throughout this book, the following acronyms are used:

PA = Personal Assistant

PAS = Personal Assistant Services

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This manual is a product of the Ohio Developmental Disabilities Council. Revisions are based upon known changes in PAS systems and community resources available to PAS consumers and their families. It is meant to be a starting place for information and tools to help with decision-making regarding PAS issues.

In the 10 years since the last revision, much has changed with regards to rules and regulations and technology. Most of all, there is an understanding and acceptance of the fact that individuals needing PAS should have input into how their needs are met. In updating this manual, the following individuals and organizations need to be acknowledged for their insight, suggestions and input:

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Introduction

Working with a personal assistant (PA for short) is probably one of the scariest things you can do. The thought of becoming an employer and hiring someone yourself or having to work with home health agencies and their red tape can be overwhelming. You are inviting a stranger into your home and, depending on your situation, giving another person access to your body, your money, your possessions, and intimate knowledge of your personal life.

There are so many things to consider:

- **What kind of help is available?**
- **Where do I find the help?**
- **How do I pay for it?**
- **Where do I begin?**
- **Am I safe?**

HINT: Your circumstances are unique! Write in the margins of the manual, underline or highlight useful sections, and cross out others that are of no use to you. In other words, make it your own personal guide to PAS management.

This manual is designed as a resource guide, to make the process of setting up your own PA support system as easy and painless as possible. It is filled with hints, points to ponder, and tidbits of information. It is our wish information and checklists included in this manual will help you in your search for a personal assistance services (PAS) provider, whether it be an employee of an agency, a privately hired individual, or a family member. We do not profess to have all the answers but hope the following pages will help you raise necessary questions to ensure your needs are being met.

Many of the examples we give are based on services available in Ohio, at the time of writing or revising this manual. Check to see whether comparable services exist in your state. Checklists, suggested job descriptions, sample want ads, and other examples included in this manual may be copied and adapted to meet your own individual needs. Government and agency forms and regulations change from time to time, so it is important to contact the IRS, or office in your state department or other appropriate agency to make sure that you have the most recent information.

And please remember: Even though you may hear stories about problems working with a PA, there are many, many success stories as well. We hope that, with the help of this manual, your PA experiences will be positive and rewarding! GOOD LUCK!!!!

What Are Personal Assistance Services?

According to the World Institute on Disability (WID), personal assistance services (PAS) are:

Those services provided to assist people in carrying out tasks they would typically perform for themselves if a disability were not present.

The scope of “Traditional” PAS is broad. PAS are supports a person needs to maintain their independence. PAS include activities such as:

- bathing, dressing, help with toileting, and transferring between the bed and wheelchair or wheelchair and car
- housecleaning, doing laundry, shopping, and driving the person
- childcare related tasks such as diapering, dressing or feeding
- helping an individual manage their money
- interpreting for someone who’s speech or behaviors may be hard to understand.

Many people with disabilities use personal assistance services. This includes not only people with physical disabilities but also those who have age-related disabilities, behavior-related disabilities, vision loss, hearing loss, brain injury, intellectual and developmental disabilities, or a need for mental health services.

PAS improves the lives of people of all ages and allows for independence and inclusion in their community. Here are a few examples:





- A person who has a learning disability or vision loss may need someone to read to them.
- A person who is deaf may need a sign language interpreter to communicate.
- A person who has a disability involving the loss of cognitive or memory-related abilities may need verbal coaching or help adapting their environment to do daily tasks.
- A child with a physical disability may need help with toileting or note-taking at school.
- An older adult who does not drive may need someone to shop and run errands.
- A child or adult with a disability that affects behavior may need assistance with re-direction, maintaining a schedule, or problem solving.

In this manual, we will use the term personal assistant or sometimes employee. Personal assistants are also called home health aides, attendants, direct-care workers, helpers, caregivers, and home care workers. It can depend on the funding source for the service. Many of these terms have a medical or clinical meaning that some persons with disabilities find distasteful or even offensive.

Your Notes

Meet Six Ohioans Who Use PAS

- ▶ **Bob**, 32, lives in Columbus. He has a spinal cord injury due to a car accident when he was 23. Bob uses a motorized scooter. He gets assistance in preparing meals, cutting food, cleaning, vacuuming, washing dishes, dressing, using the toilet, and bathing.

With PAS, Bob has been working steadily at a major accounting firm; he expects to become a full partner within a few years. Without PAS, Bob might have to live in a nursing home and be unable to work.

“ Assistants are needed at home and at work. They could play a dual role of personal assistant and job assistant.”

- ▶ **Maria**, a Utica resident who is now 22 years old, was born deaf. She was raised within the Deaf community, where she learned American Sign Language (ASL). When she was 17, an acute illness greatly impacted her vision. Since then, María has used tactile (touch) signing to talk to her family, friends and PA. She has begun to learn Braille and makes extensive use of a computer and other devices. She keeps up with the latest in technology. She plans to earn her bachelor's degree within the year.

She uses the services of a personal assistant to read and explain materials that are not printed in Braille or are not able to be read by the reader on her computer. Her PA also helps to navigate or get around unfamiliar places and to communicate with people she meets in the community, such as teachers and store clerks. Maria is in the process of getting her first service animal to further her ability to remain independent.

“ I don't need a lot of help, but I need somebody with a flexible schedule who can be with me when I need them.”

With PAS, María participates fully and independently in her community. Without PAS, María would have to rely on friends for favors, especially basic interpretation, and her schedule would be based on her friends' free time. It would be hard to keep up with literature in her field. Simply getting to a job interview would be difficult.



▶ **David**, from Marietta, is 51 years old. He was born with a significant intellectual disability. A paid personal assistant (who happens to have a physical disability) lives with him in an apartment near the downtown area. The personal assistant pays the bills after David reviews them and reminds David almost every day to do certain housekeeping and self-care tasks. The PA also helps David to deal with changes in his routine, such as periodic adjustments in the bus or work schedule. At his part-time janitorial job, David is considered very reliable and is well respected by his employer and co-workers.

With PAS, David enjoys the responsibility and dignity of being a full citizen of his community. Without PAS, David might not be able to work or participate in his community, which would lead to his living in isolation.

“ We are working people who want to control our own lives.

▶ **Carla** is 42 years old and lives in Kent. She has been diagnosed as having schizophrenia, which is controlled for the most part with medication. Due to the nature of her disability, Carla's needs may vary from day to day. For example, one day she may need one-on-one help with scheduling her day and appointments, problem solving issues that may arise, getting around the community, paying bills, keeping her money safe and so on ... At other times, she only needs someone to drop by for a few minutes each day to touch base to make sure she is alright.

With PAS, Carla takes care of her home and does volunteer work for several community organizations. Without PAS, Carla might well end up in a more restrictive living environment, not because her medications are not working as they should, but because she no longer has access to the basic, dependable services that help keep her anchored and focused.

“ We all have a responsibility to make the ADA (Americans with Disabilities Act) real, to say: *This is my right. I want you to respect my right.*

▶ **Joe**, now 78 years old, has lived in Marion for 53 years with his wife, Mary. Two years ago, Joe had a stroke, from which he is still recovering. He receives assistance mainly in dressing (fastening buttons and zippers) and in walking across the room or up the stairs. Getting around town is fairly easy if someone else drives the car and provides an arm on which to lean.

With PAS, Joe lives with the people he loves, in the home he and his family built, surrounded by the evidence and memories of his life. Without PAS, Joe might be sharing a room with a stranger, in a nursing home many miles away, and permitted to keep with him only a few personal belongings.

▶ **Jeanette** is 34 years old and enjoys living in her own apartment. She had lived in a nursing home until a few years ago. She is having trouble with high turnover of both agency and independent provider staff. This is the fourth agency she has worked with in the past year. The current agency has threatened to drop her as well, due to unrealistic expectations and how she treats her aides. Jeanette has never managed staff before and needs help learning skills to better manage her caregivers.

“ Sometimes people are thrown into situations they have never been in before. All that is needed is access to information and supports to help build needed skills. Knowledge is power!

With the help of the local center for independent living and her copy of the Taking Charge: A Hands-On Guide to Personal Assistance Services, Jeanette is learning to become a better manager of her care. PAS providers are saying they are noticing a difference and the work environment is much better.

NOTE: Each of these stories is a composite that represent multiple real circumstances rather than a particular individual. The quotations, however, are the words of actual persons.



Getting Started

You may need help to live independently, but that does not mean you have to live in a nursing home! Educate yourself, identify resources and explore your options. You should make decisions based on facts rather than feelings or perceptions. TAKE CONTROL!

Do not let fear of the unknown or pressures from others keep you from moving ahead.

Sometimes your family, friends and doctors may feel a nursing home is your only option. These kind-hearted people mean well but may not realize that you have options. They may have a vision of what is the safest environment for you that is different from your vision of yourself.

Finding a personal assistant may seem difficult. Personal assistants can be found in many ways. Sometimes funding sources decide where your PA comes from. For example, some funding sources require your PAS be provided through an approved home health agency. Others allow you to hire private individuals, including friends or family members. Do your homework to determine the flexibility of your funding source and your rights and responsibilities.

FOR YOUR INFORMATION:

The Olmstead Decision: a 1999 Supreme Court decision requires states to provide services, programs and activities “in the most integrated setting appropriate to the needs of qualified individuals with disabilities.”



Remember: There are many good, caring and reliable personal assistance providers out there! You just need to find the right match for your needs. You are offering people more than a flexible, interesting part-time or full-time job. You are offering them an opportunity to grow personally and professionally. Personal assistants can see the world through your eyes. This is a great gift and learning opportunity.

Determining What You Need

The first step in your search for a PA is deciding what type of help you are looking for. Be very realistic about your needs, preferences and priorities. Here are a few questions you may want to ask yourself:

- What do I need help with? How many hours will my care take?
- Do I prefer a male or female? Someone of a particular cultural background or age range? Does it matter? Does it depend on the type of work that particular person maybe doing for me?

PLEASE NOTE: *When hiring a PA, avoid discrimination. (See page 28 for more information.)*

- Have I considered the pros and cons of hiring a friend or family member?
- How much control do I want to assume over the management of my assistant?
- Do my PAs need to be bonded? (See information on bonding, page 42.)
- What professional qualifications am I looking for? Do I want someone who has worked with persons with disabilities, or would I rather hire someone with little or no experience whom I can train myself? Would I prefer a person who has completed a training program, such as a State Tested Nursing Assistant or Certified Home Health Aide?
- What personal qualities or habits am I looking to find or to avoid? How do I feel about an aide who smokes?
- What are my priorities or most important, how flexible can I be if I do not find exactly what I want?
- Where is the money going to come from to pay for these services, and how much control do I have over how it is allocated or spent?
- Do I really need a person to meet all my needs or can I use technology or a service animal?

By answering these questions:

- You will have a more realistic idea of your needs, priorities and flexibility. (See Needs Checklist in Appendix M).



- You will avoid setting yourself up for failures and bad experiences.
- And you will increase your chances of finding someone who meets your most important needs and who works well with you.

Who Will Pay?

It would be nice to be able to tell you that all people who use PAS are receiving all the services they need. One reason why some are not is money. Either funding or money for services is not available, or the individual does not know where to begin to look for it. Funding sources do exist and are worth checking into. Some may have restrictions based on factors such as how much income you have, how old you are, and where you live.

WAIVER: *Permission to be exempted from a rule or regulation. Under the rules of the federal Medicaid program, all states must offer certain mandatory services. An individual state may also offer certain optional services if it chooses to do so. If a state wants to offer a service that is not listed as mandatory or optional, it must apply for a waiver of the Medicaid regulations.*

Medicaid and Medicaid Waivers are one of the largest funders of PAS. If you are eligible to have Medicaid pay for care in a nursing facility, it may be possible to receive PAS in your home, through Medicaid or a Medicaid Waiver. In Ohio, waivers are currently available through the Ohio Departments of Job and Family Services, Aging and Developmental Disabilities. **Waivers vary in terms of design and services.** Medicaid waivers may also be available if you have both Medicare

and Medicaid and are receiving services through a managed care organization. Since states must reapply for waiver certification periodically, waivers may change from time to time in terms of services provided.



Over the past several years, **much has changed about how Medicaid-funded PAS can be provided.** In the past, all Medicaid-funded PAS services needed to be provided by a home health agency. This is no longer true.

On a national level, Medicaid is urging states to expand consumer-directed PAS options. This allows consumers in some states to use Medicaid funds to pay for **individuals they can hire and train themselves** to provide PAS. If you are interested in this option, contact the state agency responsible for oversight of the waiver programs to see what PAS options are available.

Other possible sources of funding and support are:

- children’s services programs (remember that schools are required to provide PAS to qualifying children while they are in school),
- area agencies on aging,
- private insurance,
- state vocational rehabilitation agencies and their various programs,
- county boards of mental health, and
- county boards of developmental disabilities.

Departments or Offices of Veterans’ Affairs frequently offer PAS (“home care”) for veterans who have service-connected disabilities. Sometimes disability-specific agencies will have funding available for respite care. If they do not offer funding for PAS, they may know of sources you have not tapped into yet. Organizations connected with a particular religion are another possible source. It is possible your funding will come from several sources.

Personal Assistance Services do not always have to cost money. Some people use the barter system. For example, if you have skills in a particular area, such as math or reading, you may be able to tutor or read mail for someone in exchange for help with shopping. You may offer room and board in exchange for assistance. A note of caution when offering room and board in exchange for PAS: make sure your PA has time off . . . this is not a 24/7 arrangement.

NOTE: A list of phone numbers can be found near the end of this manual, just before the Appendices.

Do not be afraid to be creative! Some of the best matches come out of meeting each other's needs.

You may be denied funding or services from a particular group. If this happens, there is usually an appeal process. Sometimes it seems agencies automatically deny requests the first time around. Others prioritize requests by income levels, diagnosis, geographic area and the level of care you need. If you appeal a decision, it may be reversed in your favor. Also remember that government systems and services of community-based organizations change from time to time, and programs are added periodically. **What you do not qualify for today, you may qualify for at a later date. Be persistent. Do not forget the adage: "It never hurts to ask," "All they can do is say no (and they might even say yes)," and "You'll never know unless you try."**



Your Notes

Making Some Decisions

Deciding Between Hiring Someone from an Agency and Hiring a Private Individual

There is disagreement among persons with disabilities of all ages, about the benefits of using personal assistants who work for an agency versus those that are hired by the consumer. At the heart of the controversy is a trade-off between quality assurance and consumer choice. **This is an individual choice that involves how much control an individual wants, types of services needed and funding requirements.**



Home health aides hired by home health agencies have passed competency tests given by the agency. A National Home Health Aide certificate is available to individuals who have received training from an approved site. They must also pass the certification exam. All agency and certified home health aides must complete in-service training each year. PLEASE NOTE: At this time, Ohio currently does not have a Home Health Aide certification process nor do they recognize the National certification.

Depending on who is paying for the service, non-agency PAs can be friends, some family members, or people responding to your want ads.

If you are in a position to choose, consider both alternatives and make a decision based on your needs. In some cases, if you are required to use a home health agency, it may be possible to find a PA yourself and have that person hired by an agency. The chart on pages 14-15 lists some comparisons.

Consider your options carefully when making your decision. Think about what is best for you. Ultimately, whether you work with an agency or a private individual (or a combination of both) depends on you, your funding source, your priorities, comfort levels and management skills.



Deciding What is Non-Negotiable

Your life is your responsibility. Whether you work with a private individual whom you pay yourself, a home health agency, or even a volunteer, it is important that you take control of your situation.

- Learn what your rights and responsibilities are with the personal assistance provider(s) and funding source(s).
- Be an advocate on behalf of yourself.
- Know which community organizations in your area can advocate on your behalf.
- Understand your responsibilities as an employer/manager of your care.
- Most important of all, do not compromise on anything that significantly disrupts your life or puts you in an unsafe situation. For example:

If you need to get up at 5:00 a.m. so that you can get to work on time and your PA cannot get there until 7:00 a.m., find someone else. The same goes if your PA is always late or does not even show up to work.

You are the only one who can ensure that your needs are being met. Do not surrender control of your life to your PA. No matter where the funding comes from, you should be in charge of your life.

A well-known Ohio self-advocate shared, “ **it’s his responsibility to know what he needs assistance with and how to explain to someone the “mechanics” of how to help him. If he can do that, then providers usually don’t take control. It’s when people are passive in explaining what they need and HOW they need it done, that providers take over because they aren’t getting any direction from the individual.**”

Your Notes

Agency vs Non-Agency

The chart below highlights some difference between agency and non-agency providers.

AGENCY	PRIVATE INDIVIDUAL or INDEPENDENT PROVIDER
<p>Most agency PAs come with credentials and may have restrictions or limitations on who can provide services.</p>	<p>It is up to you to determine the credentials or experience levels needed. Some people do not want a PA with credentials and prefer to train them to meet specific needs Some funding sources may have minimum age and training requirements.</p>
<p>Some government and insurance funded programs may require you use an agency.</p>	<p>Some government and insurance funded programs allow you to hire an independent provider. If you are paying the PA yourself, you can hire anyone you want.</p>
<p>Agencies are required to provide backup.</p>	<p>You are responsible for finding backup help.</p>
<p>The agency handles employer responsibilities such as hiring, firing, scheduling and paying taxes.</p>	<p>In a private pay situation, you are required to handle employer responsibilities. You may hire a fiscal intermediary or someone to handle the paperwork and taxes. When using an independent provider, they may be responsible for their taxes or a funding source may have other procedures for addressing tax issues.</p>



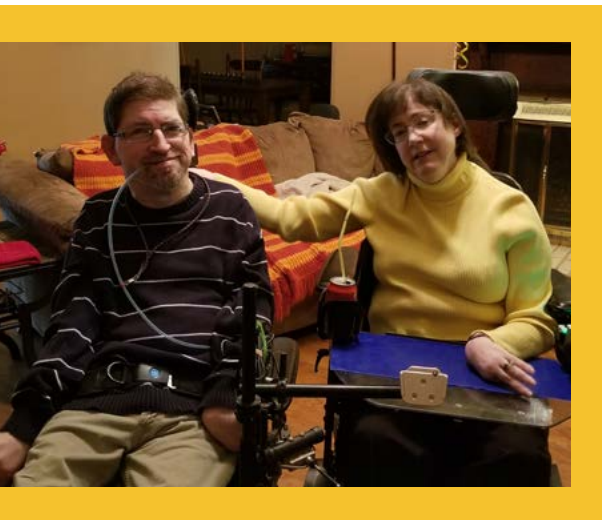
AGENCY	PRIVATE INDIVIDUAL or INDEPENDENT PROVIDER
<p>Agencies often provide services in blocks of two, three or four hours with a minimum of two hours at a time.</p>	<p>You can hire a PA for the exact amount of time you need.</p>
<p>Agencies have regulations restricting the type of work a PA is allowed to do.</p>	<p>Private individuals may have more freedom in terms of the types of jobs they are able to do.</p> <p>Independent providers may have the same restrictions as agencies in terms of what they are able to do, depending on the funding source.</p>
<p>Because PAs often work with several individuals, agencies may find it necessary to limit the times which your favorite PA is able to work.</p>	<p>You may have more flexibility in scheduling. It is up to you and the PA.</p>
<p>Agency PAs are often required to wear uniforms or scrubs.</p>	<p>You can decide how your PA dresses for work. For example: if your PA comes to your worksite, you may not want them in a uniform.</p>
<p>Agencies charge a higher rate if you have to pay them directly.</p>	<p>Private individuals and independent providers may charge less. Some funding sources have fixed pay rates even for independent providers.</p>
<p>If you work with a regional or national agency, you may be able to schedule services in another area of the state/country if you travel or move.</p>	<p>You are responsible for finding your own PA if you travel or move.</p>

Gaining Control

Working with a Home Health Agency

Choosing to work with a home health agency should not automatically mean giving up control of your life. Granted, you will be part of a larger system, with its own set of rules and regulations, but try to make the system work for you.

First of all, how do you find an agency? Your doctor may recommend one associated with a hospital. You can search the internet or if your community has one, look in the yellow classified section of your phone book or community resource guide. Your best bet is to talk with someone whose opinion you trust, such as a friend, nurse, social worker, or religious or spiritual counselor. You may also want to check with your local Long-Term Care Ombudsman office; an association of agencies or organizations such as United Way, Community Shares, or National Voluntary Health Agencies; or a disability-specific group or social service agency.



Disability-specific agencies and groups may be able to give you names of people who have experience with different home health agencies. These individuals may be able to offer valuable insight and advice.

Feel free to **interview several agencies** to see whether you would feel comfortable working with them. Do not forget to ask for references. When you check with people who gave those references, ask whether the agency responds to their needs and whether they feel part of the planning process.

The first person you talk to at an agency will be an **intake worker**, who will take your medical and insurance information and may be able to tell whether you are eligible for any other services. The intake worker will also give you a good idea of what you can expect from that agency. If you do not fully understand what services the agency offers, ask the intake worker to put the information in writing or to send you a brochure.



Soon afterwards, you will be visited by a **home health nurse** to put together your care plan.

This plan will let the home health aides (personal assistants) know what they need to do for you. It is important for you to have a lot of input during this interview. It is an opportunity to make sure your needs are known and planned for!

Let the nurse know what you need and why. Nurses are not mind-readers and may not always know what is best for you. Of course, some of what you want, such as a certain number of hours or particular times of day, may not be available because of funding or staffing restrictions. Be prepared to negotiate and possibly compromise.

Your Notes

Throughout this process, pay attention to how you are treated. Are you listened to? Are you treated with respect and dignity? You should be.

Get to know the **staffing coordinator** in charge of scheduling your assistants. Positive communication is a must! If you make your likes, dislikes and needs known, the staffing coordinator will have an easier time finding the right match. Do not assume your staffing coordinator has all the information from the intake interview. It may help to keep a notebook with the names of your staffing coordinator, home health aide (personal assistant), and nurse. Other information, such as the best times to call and grievance procedures, should also be kept in the notebook. Please note that staffing coordinators change often so keep up with agency staff changes.

Often, people call staffing coordinators only to complain. If you like your PA, or you appreciate what a staff person is doing to help you, let the coordinator know. The job of a staffing coordinator is extremely demanding, and a kind word goes a long way.

If you take the time to develop a good working relationship with staff, you will increase your chances of having positive experiences with the agency.

DEALING WITH DISAGREEMENTS:

1. *Calm discussion*
2. *Grievance procedure*
3. *Long-Term Care Ombudsman*

What happens if you just cannot agree with your PA or coordinator? This can be a uncomfortable situation. It happens from time to time. The first step is to try talking out the situation in a calm manner.

Keep records of what was said, who said it, and what happened as a result of your conversation. If the issue is not solved by talking to the aide or coordinator, follow the agency's grievance procedure. Again, keep records of your actions.

If you feel that you have tried to be reasonable and the agency is still not providing services you are entitled to, call your state's Long-Term Care Ombudsman office. Its purpose is to handle and resolve complaints about home health agencies, group homes, adult day care centers, and nursing homes.

The reality is that at some point you might feel the need to change agencies, either because you cannot get the services you need or because you do not like working with the staff currently available. Do not be shy about interviewing a prospective agency just as you would interview a potential employee. But **be careful about firing one agency before lining another one up** and do not bad-mouth one agency to another! You would be surprised how long the gossip grapevine is among home health aides! What you say one day may come back to haunt you later.

Your Notes



Working with an Independent Provider and “Private Pay” PA

The next few pages talk about finding, hiring, training and working with an individual PA that is, someone you find and supervise yourself rather than using a home health agency for services.

There are two types of non-agency staff you may work with. A “private pay” personal assistant is one that you have hire and fire authority or power over. You pay wages, taxes and control what is done and how it is done. You also supply the materials needed for the job.

The other type of non-agency provider is an **independent provider**. At the time of this manual revision, some funding sources in Ohio allow the use of independent providers. Please review IRS Publication 926 (<https://www.irs.gov/pub/irs-prior/p926--2021.pdf>) on “Employment Taxes for Household Employers” which explains in detail the difference between an employee and an independent provider. Sometimes independent providers are called independent contractors.

The first step in hiring your own PA is to make a list of exactly what you expect from a PA. In this step, you are doing for yourself what the home health nurse in an agency would help you do. Sample want ads, job descriptions, and interview checklists can help you decide what is important to you. Several examples are included as Appendices. Feel free to change them to fit your needs.

After you have decided what you are looking for, it is time to start looking. There are a variety of ways and places to advertise your position. Some cost money, but many are free.

Talk to friends or others in similar situations to find what advertising methods work well for them and why. What works in one area may not in another area. If you do not have people to help with ideas, try calling the Center for Independent Living in your area or a local disability-related support group. You will find that people will usually be glad to share their experiences and point you in the right direction.

- Use words that are understood by the general public.
- Include a method for responding to the ad

Want Ads

Print or electronic newspapers/newsletters are another way of advertising. Some communities have weekly papers that offer ads at low or no cost. Daily papers that reach a larger audience tend to charge more than weekly papers.

Along with electronic media formats such as <https://ohiomeansjobs.com> and “Craig’s List,” most print newspapers also have internet-based formats as well.

SUGGESTION: *If people have difficulty hearing or understanding your speech, consider faxing or emailing your want ad, rather than phoning it in. Some want ads are done through the paper’s website.*

Others have had success with social media such as Facebook. Social service agencies and centers for Independent Living may be sources of names as well. An ad can often be run in their newsletters. Some people have also found success with church bulletins and college newspapers.

Use what is most comfortable for you.



TIPS: When advertising in a daily paper, you may want to think about running the ad Friday through Sunday. Job hunters typically look at ads on those days.

If you run an ad in the General Announcements section and get little response, try putting it in another section, such as Medical, Social Services or Domestic Help. There are no hard-and-fast rules about which is the best section.

If possible, your ad should include a general idea of the job duties, whether experience is required, pay scale, area of town, and gender preference. (NOTE: Some papers may have restrictions on specifying gender.)

SUGGESTION: *Newspaper want ads are usually alphabetized. Try starting your ad with a word or phrase that begins with the letter A, such as Aide or Attendant wanted. This way your ad is one of the first to be listed.*



SAFETY TIP: Use a post office or newspaper mailbox for responses. If you use internet-based formats, consider getting an email address specifically for that purpose. Do not give out your home address or personal email.

A Word or Two About Language

There are two schools of thought about words used in referring to the position we are calling Personal Assistant.

According to one approach, you should keep it simple. Individuals involved with disability issues will know what a personal assistant is, but anyone else reading the ad may think that you are looking for a secretary. Most people understand the words home health aide or attendant. **So, pick words your readers already know.** By including additional information, you will hopefully screen out people who are inappropriate.

The other way of thinking holds that you get what you ask for. You may want to hire a personal assistant so that you can live a more independent, active life. If, however, you advertise for a home health aide or a caregiver, you may find that your job applicants are more prepared to take care of you as a “patient” than to work with you or see you as an employer or supervisor.

The words you choose are up to you. For example: one person learned their lesson about choosing words carefully when they advertised a job opening for “Service Coordinator” (which was the actual job title) rather than a “Social Worker” (which is what they were looking for). They had egg on their face when they received countless resumes and phone calls from auto mechanics who had experience in service stations!!!

NOTE: The sample want ads in the Appendix all use “person first” language, that is, language that puts the person before the disability (person with a disability,

SUGGESTION: *Focus more on the actual tasks to be performed than on the job title: Adult w/ disability needs help w/ bathing, dressing, eating, etc. Early morning. Shaker Heights area. Pay negotiable. 555-4467.*

child with cerebral palsy). Because “person first” language usually requires more words, some individuals choose not to use it in order to cut back on the cost of a want ad.

Bulletin Boards

Bulletin boards are another option. Since you are not limited by cost or number of words, you can write a more detailed description of your position. You can find bulletin boards at colleges, places of worship, libraries, hospitals, drug stores and supermarkets. Picture the types of people you might be interested in hiring and think about where they would go in their everyday life. If there is a bulletin board at that location, post your notice. Consider it fishing, with your ad as the bait!



Do not forget electronic bulletin boards and computerized databases. Two and four-year colleges have them, as do state Departments of Labor. There is usually no cost, and your listing will be there until you cancel it or the database is updated.

Word of Mouth

Word of mouth is a wonderful way to find help. Talk to your friends, relatives, current and past employees, members of your house of worship, and anyone else you can think of. Describe what you are looking for.

Sometimes it helps to be specific about the

type of person who may be able to meet your needs. **For example**, suppose you need a driver to take you to morning meetings or to get your mom, who has had a stroke, to her morning doctor’s appointments. You can ask your “network” whether they know of people, such as parents at home with school-age kids, who would like to earn extra money during the day while their children are in school. **It helps to “paint a picture” of who might be available to help you.**



Other Resources

Some high schools and colleges offer credit for work or volunteer experience. Depending on your educational background, it might even be possible to make your PA position an internship and you would be the supervisor. It does not hurt to check.

Another consideration is for a cooperative. Cooperatives have been used for sharing PA providers or PAS backups.

Helpful Community Connections and Natural Supports

The communities we live in are filled with natural supports designed to help everyone who lives there. A trusted teller at the bank (for example, if you have trouble reading or handling money), a reliable taxi service (especially if you do not drive), a helpful neighbor, church parish nurses, good paramedic services, maid services, good friends, and flexible community recreation programs are all examples of services already in place. They do not have to be contracted, case-managed, or sometimes even paid for. However, natural supports are critical to people with disabilities who are seeking full lives in their communities. Keep names and contact information of helpful people and services such as these in a reference file.

If you are unsure of where to turn for help, you can always start with your local center for independent living, area agency on aging or County Board of Developmental Disabilities. Their staff have a wealth of information and experience.

We mention natural supports in this manual because they are often the solution when a personal assistant can provide some, but not all of what you need. If a potential assistant can do everything but drive, some existing transportation service may hold the answer. If you really like your PAs, trust them, find them easy to work with, but know that they cannot cook at all, community cooking classes or Meals on Wheels might be an option. When you can find coverage for every day but Sunday, a combination of church volunteers and family members may fill the gap.

Using natural supports often calls for creativity, flexibility, and sometimes a spirit of adventure. They may just be able to make the difference in making personal assistance services work!



A Note About Our Four-footed Personal Assistants

We would be remiss if we didn't mention benefits some people experience with service animals. Service animals may come to you already trained with basic commands and then learn new commands tailored to your needs. Others are able to be trained by you. Services that animals may help with are dressing, getting mail, opening doors, signaling for help, letting a person know if a seizure is about to happen and so much more. Service animals can go pretty much wherever you go and they usually work for hugs and food!

Technology

Technology is constantly changing and can be a great help in maintaining independence and communication with others. Technology can be used to open house doors, answer phones, call for help, turn on lights, turn on computers and TVs all through voice activation, a click of a button or apps on phones. Devices such as Alexa have proven invaluable for many. For information about technology, consider contacting places such as centers for independent living, the Ohio Developmental Disabilities Council and Assistive Technology of Ohio. Contact information for these agencies is listed in the Resource Section of this manual.

Your Notes



The Hiring Process

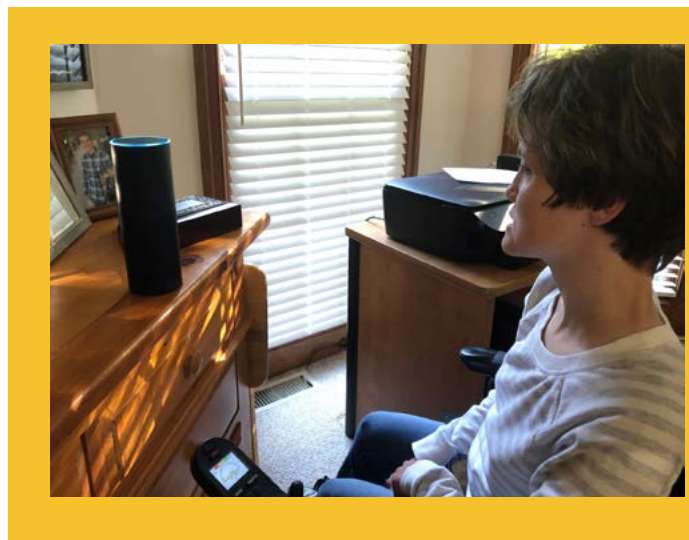
Now that you have several people who sound absolutely wonderful, what do you do? At this point, you have the option of scheduling a face-to-face interview or conducting an initial phone interview. In either case, have a list of questions ready. A sample interview sheet is included in the Appendix section, as well as a list of other questions you may want to consider personalizing. A job description should be available to be read over the phone and/ or handed out in the meeting. Job descriptions should list the main components of the job. They should be easily understood. When describing job duties, try to use specific action verbs such as: bathes, cleans, lifts, transfers. **Be realistic about the qualifications you need in your PAs.** If they need to be able to lift 80 pounds in order to transfer you safely, do not accept anyone who cannot.

Phone Interviews

Initial phone interviews are wonderful because they allow you to pre-screen candidates and save lots of time. A percentage of your callers will have a problem with some part of the job: The hours are too long, too short, too early, too late; the pay is too low; they do or do not want taxes withheld.

Some people think that if you have a disability, the state will pay for any amount of support you need, at any rate of pay you or they set! If you explain the scope of pay and work to them such as: you have limited funds, or you need to get up at 6:00 a.m. so that you can get to work by 9:00, they may have a better understanding of the importance of the work. On the other hand, they may hang up on you! If that is the case don't be discouraged. Count your blessings, because you would not want to work with them anyway!

Whatever you do, **do not let the caller talk you into increasing or decreasing the hours, raising the pay rate, or making any changes you feel are unsafe or do not meet your needs.** However, if you constantly get the same comment that the pay is too low or the hours too long, you may want to reconsider those



items. For example: You may not have anyone interested in working 10-hour days, seven days a week. What you want to do in this case is to divide your work shifts among several people rather than looking for one person to do everything. The bottom line is you know what you need and can afford. You should work with those parameters to best have your needs met.

As you talk with the potential PA, ask yourself, “Is this someone who sounds like he or she can handle the work I am asking them to do?” and “Is this someone I would get along with?” If so, schedule an interview.

Give all applicants clear directions to your meeting site and mention anything you want them to bring, such as references, a valid driver’s license, and proof of insurance (if they will be driving you in their vehicle). Be sure to keep each applicant’s name and phone number in case you need to change the time.

SUGGESTION: *Consider carefully where you will want to hold face-to-face interviews. Meeting in your home gives applicants a clear idea of there they would be working much of the time. Meeting in a neutral location, such as a public park (in good weather), a library or quiet restaurant, helps to protect your privacy.*

Face-to-Face Interviews

The face-to-face interview is an opportunity for you and your potential employees to get to know each other. During this meeting, give them a copy of the job description and have them fill out an application. Sample job descriptions are available in the Appendix section.

Explain in detail what the job involves, the hours, and how much

they will be paid. You may want to tell about your disability and how it affects you. Be sure to talk about the details. Do not gloss over the details because you think that it might scare them off. Worse yet, do not assume because they helped another person at one point, they automatically understand what you need or are talking about.

It is helpful to ask applicants about previous jobs and life experiences. In discussing past jobs, ask what they liked least and best about each one. This



information will give you a sense of who the person is. It is also important to ask about goals and expectations for the future. If the person is planning on leaving in a year to enter graduate school or to start a family, you need to know so that you can plan ahead.

SUGGESTION: *If either you or the applicant have doubts, or if your needs for assistance are complex, consider having the applicant observe your routines before an offer of employment is made.*

Be careful of falling into the trap of stereotyping people. Young people do not always change jobs frequently! Not all newlyweds rush to start a family! Older persons are not all close-minded, sticks-in-the-mud! People from other cultures do not automatically consider disability to be a pitiable, shameful condition! Get the idea?

While it is aggravating, do not be discouraged if people do not show up for face-to-face interviews. You can expect about half not to appear!

Do not be afraid to ask for examples of how applicants would handle or have handled situations that you feel are important: “What would you do if you dropped me during a transfer?” “Give me an example of how you had handled problem situation.”

the interview. Be sure to have another person present just in case their transfer skills are not what they should be!

This is a good time to show potential employees the area they would be working in. If part of the job is driving, consider having applicants take you for a spin around the block. Can they drive a stick shift, a big van, or drive long distances if the job requires it?

SUGGESTION: *If you are nervous or unsure of your interviewing skills, ask a trusted friend or family member to sit in on the interview with you.*

Discrimination in Hiring

According to the Equal Employment Opportunity Commission and the Americans with Disabilities Act, questions about religious beliefs, gender, race or ethnicity, national origin, health, disabilities, sexual orientation, veteran status and age are considered discriminatory.

Individual states have their own regulations based on smaller numbers of employees. In Ohio, for example, the Civil Rights Commission enforces state laws that prohibit discrimination by employers based on the number of employees.

NOTE: *Non-discrimination practices should be used no matter how many employees you have.*

But what do you do if you are a woman with a staff of five PAs and do not feel comfortable with a man bathing you? Or if you are a male needing help with toileting at work or school and would rather your PA be another male? These are legitimate questions and concerns, and you have a right to ask for a waiver of the regulation. To apply for a waiver in Ohio, contact

the Civil Rights Commission and ask for a Bona Fide Occupational Qualification (BFOQ). You will have an opportunity to explain your particular situation. The laws in Ohio do not apply to employers of fewer than four employees.

Reference Checks

Always, ALWAYS check applicant's references! It does not matter that the person gave a better interview than anyone you have ever seen! It does not matter that you liked him or her and think you would get along great together! It does not matter you already know the person through friends, work or school! You cannot or should not make a sound decision without input from others who have known the applicant longer or in different ways.

Use both written and phone references. People will be more willing to give you more accurate information over the phone than in writing. You also have the opportunity to sense any reservations they may have. If you hear reservations or hesitations, be sure to address these issues.



If you get one bad reference and three good ones, try to determine which source has more credibility. One employer, for example, may have a personal grudge against a former employee (ie: maybe they didn't like the way they wore their hair or the number of earrings in their ears). Ultimately, you have to trust your gut feelings, and the accuracy of these feelings will improve over time.

Ask the person for the names of three to five people who will give professional and character references. This includes people they have cared for, even if it is an elderly or ill family member. By asking for more than you actually need, you are assured of two to three usable references. Persons providing references may be out ill or on vacation when you call. If applicants have not worked for a while, ask them whether they have done any babysitting, taken any classes, or served on any committees. If parents are willing to trust this person with their child, that is a good recommendation. Likewise, a professor or committee chair can tell you whether someone had good attendance and completed tasks properly and on time.

Some companies will ask for a written release before telling you anything about the employee. A sample release form is included in the Appendix. Others may have a policy not to give out any information other than dates of employment.

When checking references, briefly verify what applicants told you about their dates of employment and job title. Determine whether their job performance was satisfactory. If an applicant no longer works for a particular employer, ask about eligibility to rehire. Ask questions that will tell you specifically what you need to know.

SUGGESTION: Ask questions that require more than yes or no answer. These questions will begin with words like: “Tell me about ...” or “How did you ...”

For example:

- What can you tell me about his or her attendance?
- Can you describe his or her job performance?
- The ability and willingness to follow directions is important to me. What can you tell me about his or her ability to listen and follow directions?
- How responsible is he or she? Give me an example.
- Give an example of his or her ability to handle tense or emergency situations.
- How did he or she get along with others? Can you give me an example?
- Give me an example of how he or she handled constructive criticism.
- Did you trust him or her? Why or why not?
- Would you consider rehiring him or her? Why or why not?

Successful reference-checking is mainly a question of balancing information you obtain. Weigh employment references (including babysitting and classes) more heavily than personal references. Naturally a close relative or best friend will have only good things to say, but sometimes you can tell a lot about people by the company they keep.

If the person giving the reference is reluctant to give you “yes” or “no” answers, you can ask them to rate their answers on a scale of 1-5. For example: On a scale of 1-5 with 5 being the highest rating, how would you rate their attendance? If the person providing the reference gives a low rating, feel free to ask for more information or examples.

SUGGESTION: Consider an introductory period, such as 60 or 90 days. If an applicant's performance is satisfactory at the end of this period, you can hire him or her permanently.

Even if all the references look good and you think that you have finally found the right person, you never know until the last minute whether the person will end up working for you. You may call to offer the job only to find out that your favorite applicant has taken another job or is no longer interested. Do not take it personally. Keep a sense of humor and do some more interviewing.



Paperwork

The first time your PA comes to work, have him or her fill out paperwork needed for payroll (information on taxes and forms needed are covered elsewhere in this manual). Make sure the PA understands which taxes are being withheld, when the pay period ends, and when paydays are scheduled.

SUGGESTION: *Paying one week in arrears (one week after the end of a pay period) gives you time to do the necessary paperwork and withhold taxes.*

Many public funded providers (Medicaid and waivers, etc.) use electronic documentation called Electronic Visit Verification (EVV). There is still some controversy over EVV from advocates but it is doubtful EVV is going away.

If you are paying your PA privately or with your own money, do yourself a favor by

insisting your PA log in at the beginning and log out at the end of each shift. It is too easy to forget when your PA arrived and left, especially if you have a varied schedule or several employees. By keeping time logs (also called time sheets), you have a paper trail that shows tardiness, absences, as well as good attendance. This can be useful information to have when you do employee evaluations. **No matter how busy you or your PA are, do not allow your PA to fill out time logs in advance.** A sample time log has been included as Appendix N.

SUGGESTION: *To avoid disagreement over accuracy of time sheets, both you and your employee should sign or initial the sheet at the end of a shift.*

Your Notes

Management Issues 101

Supervising your PA is unlike working with any other type of employee because most traditional employer-employee relationships do not involve such close personal contact. Sometimes roles become confused as good friendships develop. Sometimes the PA may forget and need to be reminded who the decision-maker is in your relationship. **It is important that you stay in control.** You should be able to prioritize and problem-solve issues if it becomes necessary to do so.

Supervising does not mean dictating. It means helping your employees work to the best of their ability. Respect and good communication between you and your employees cannot be stressed enough. If you find yourself changing agencies often or you are constantly having to hire new caregivers, the issue might not be them but you. That may be a hard thing to admit but if you realize you might be the problem, you can begin to make changes in your expectations and management style.

There are many resources available through your local library and the internet on how to supervise staff. The majority of these materials agree on several points:

- Make sure that your employees understand what is expected of them.
- Respect them as people and for the role they play in your life.
- Let them know how valuable they are to you.
- Praise them when they are doing well.
- Be fair and honest in your dealings with them.
- If you need to discipline, address the issue calmly and as soon after the occurrence as possible. Listen to their side. Resolve the issue, document it, and then let it go.
- Be open to suggestions. Make employees an active part of solving any problems that may arise. They may come up with creative solutions you never even thought of!



Communication is Key to Success!

Good communication is vital. **Make sure you are communicating what you mean to communicate so that there are no mixed messages.**

Here are two communication exercises to try with your PA:

1 Give your PA a piece of paper and a pencil. Ask them to draw a circle one inch wide. Then ask them to draw a circle the size of a quarter. You will find out quickly how they perceive things. Are the two circles the same or different sizes. HINT: A quarter is about an inch

What may be small to you may not be small to someone else. If you ask them to get your blue shirt are you talking about the dark blue, light blue or the blue striped shirt. Think about what you are saying when you tell your PA to put your wallet “over there.” Where is “over there?” Unless you are perfectly clear in your communication, you may never find your wallet!

2 Write down directions on how to make a peanut butter and jelly sandwich. Ask your PA to make the sandwich according to your written directions. You can read the directions to your PA. They have to follow your exact directions.

It’s interesting to see what happens, especially if you forget to have the PA get a knife or something to spread the peanut butter! If you are able to make a sandwich, have your PA write the instructions so you can switch roles.

When you are talking with people, look them in the eye. Watch their reaction to what you say. Are you sure they understand what it is you are talking about? If not, say it another way, using words that are easily understood. Give examples where you can.

If your speech is hard for some to understand, let them know you understand the difficulty. Encourage them to ask you to repeat what you said if they do not understand. You might consider having pen and paper handy to jot notes back and forth if needed. Friends, family or

SUGGESTION: *If you and your PA are unable to resolve a dispute, consider bringing in a third party to mediate. The third party could be a trusted friend, or staff from a center for independent living, department of aging or county board of developmental disabilities.*

another PA may be helpful as an interpreter until a new employee learns your speech patterns or communication techniques.

A variety of obstacles get in the way of good communication, both the ability to express thoughts and to listen. Mental and physical stress, not feeling well,

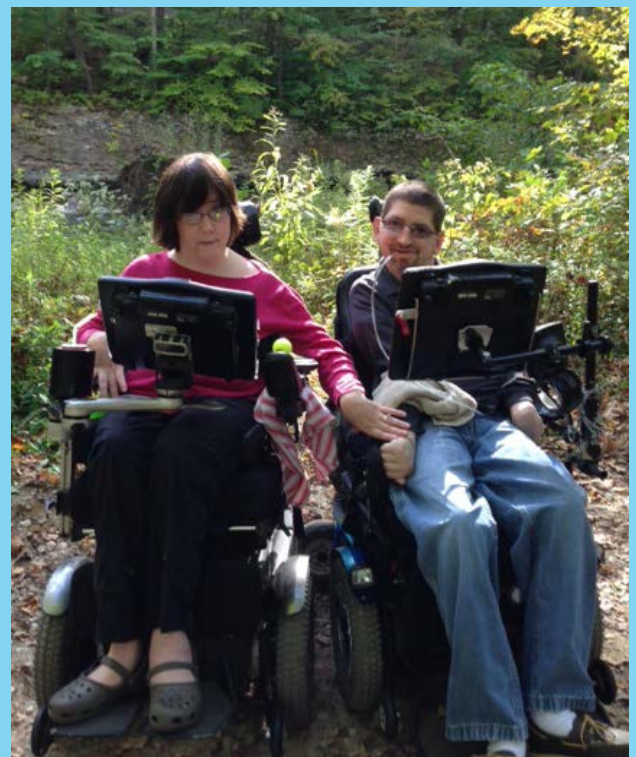
medication side effects, and fatigue have an impact. If you are excited or anxious about something happening in your personal life or you are worried about getting the leak in your car fixed, it is hard to follow a list of instructions that others are giving you right now, much less remember what it was they wanted ten minutes ago. The same is true for PAs. If you see that your PA is distracted, give a gentle reminder that you need his or her undivided attention.

By treating your employees with respect and fairness and by showing them a willingness to listen, you will lessen the chances of high staff turnover. You will have created a wonderful, fulfilling work environment that promotes loyalty and trust.

Scheduling

All too often, we tend to overuse PAs we like to work with. When thinking about scheduling, how often do you think in terms of having one person work six/seven days per week or long shifts. If you have a live-in PA, do you expect them to be available 24/7? Remember your employees are people with private lives outside of work.

A good rule of thumb is to make sure that you have more help





than you really need. For example, you may need someone for two hours in the morning and three in the evening, seven days a week. Your current PA is great to work with and willing to work both shifts. A match made in heaven, right? What happens if he or she gets sick on Friday night and cannot even get out of bed on Saturday morning? It might be a better idea to hire a second or even a third person to split the shifts or days with your first employee. In this way you have a better chance of having backup help to cover emergencies and vacations.

Back-up and Planning for Emergencies

Most funding sources require you to have backup plans. While this sounds simple, **you should spend time thinking about what a good plan looks like for you and how to put it together.** Once you set it up, it is a good idea to test out your backup plan occasionally. Many people automatically think their friends or family are the backup. In theory, this is right but is it realistic? Let's say, there is a snow storm and you cannot get out of your house. Can your PAs get in? Are the roads clear so they can drive to your house? What if they can't? What do you do and who can you call for help?

While we are talking about backup, let's talk a little about **planning ahead and preparing for an emergency.** Backup planning is part of preparing for an emergency. Another part is thinking about what you would need if you could not leave your home for an extended period of time, i.e., to go grocery shopping or to the bank. In that case, do you have an extra supply of food or water to hold you over for a few days? What about medication and incontinence supplies? If you have animals, do they have enough food? It is a good idea to have extra, easy

Your Notes

to fix meals on hand or even made ahead and in your freezer. Do you have extra cash available? When thinking how you would plan for an emergency, consider what you would do if the power went out for a few days, snow emergencies where someone could not get to you, water main breaks where you are without water, etc. This is not meant to scare you but to make you think ahead so you can be prepared. You can find more information on planning for a disaster or emergency at www.ready.gov.

Training

At first, it may seem awkward to train someone to assist you, but it will eventually become easier. You will have an easier time if you have a good understanding of what you need and how you want to have it done. **You probably have more experience in training others than you realize.** You may have instructed your parents or family members in how to help meet your needs. Remember the time you were away from home, maybe at camp or in the hospital, and had to explain to total strangers how to work with you?

SUGGESTION: *Your PA should be paid for the training period.*

Everyone has unique teaching and learning styles. Some prefer to work alone with their new PA. **Others find it easier to have the new employee watch another person working with them.** You may find that a combination of both styles works best.

SUGGESTION: *For the sake of your own sanity, try not to have too many people start during the same week.*

It is helpful to start training a new employee when there are no time limitations. Expect new PAs to be nervous and everything to take longer. Be patient while they are learning your routines, likes and dislikes. Encourage questions and try to reassure them when they forget or make mistakes. Sometimes a written checklist helps.

The training process can be mentally and physically exhausting. It can also be a lot of fun as you get to know this new person in your life. You will notice vast improvements from one day to the next as you develop your working relationship.

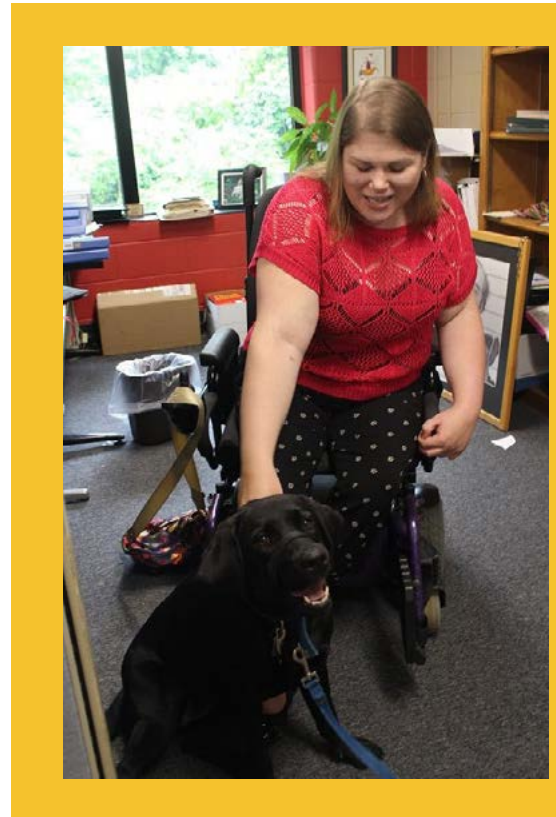


If you notice your PA has a problem learning a particular task, skill, or sequence of tasks, try breaking it down into smaller steps. Once they have mastered one step, you can begin adding others. Have patience and keep your sense of humor!

Working Agreements

Working agreements, or contracts, help promote professionalism and underscore the importance of the work being done for you. **They also serve as a guideline for discussion of responsibilities and duties.** Sample contracts and working agreements have been included in the Appendix.

Although contracts do not have to be lengthy documents, they should specify work hours and duties, salaries and benefits, and days off. In the case of a live-in PA, consider adding sections to cover the personal use of specific rooms, individual and common food, household expenses such as utilities, use of the phone, and overnight guests. Both parties should have input into development of the contract. Both parties should then sign the document. Remember: Contracts are sets of agreements. If a particular agreement no longer works, change it to suit your needs.



Your Notes

Taxes

Personal assistants (non-agency) are considered household employees or domestic workers under the federal definition. They are usually not considered independent contractors, however, at the time of this manual revision, **some Ohio funding sources do recognize independent contractors.**

The mere mention of being responsible for employer taxes is enough to make the strongest of us all cringe in fear! “What if I make a mistake?” “What if I use the wrong form?” “Will Uncle Sam throw me in jail if I goof up?” The keys to surviving the tax mess are not to panic, to understand your responsibilities as an employer, and to develop an organized record-keeping system.

As an employer, you are responsible for making sure the employee is eligible to legally work within the United States and for withholding Social Security (FICA) and Medicare taxes from employee wages if appropriate.

You may also be responsible for payment of federal and state unemployment taxes and workers’ compensation taxes. Worker’s Compensation is a form of insurance that provides payment if your PA is injured on the job. The withholding of federal and state income taxes is optional; however, the withholding of city income taxes may be mandatory. Check with your city tax department.

NOTE: *If you are not sure if your potential employee can legally work in the United States, call the U.S. Citizenship and Immigration at (800) 357-2099.*

The federal government has tried to simplify the reporting process for employers of domestic help over the past several years. Rules have changed so that you report payments once a year, on Schedule H, when you file your year end income tax return (Form 1040 or Form 1040A). You file only if you pay cash wages of \$1,400 or more to any one employee during the calendar year.

You also have an option of paying estimated taxes on a quarterly basis if it is easier for you. You can estimate the tax you will owe and then make payments quarterly (every three months). Making quarterly payments, using the 1040-ES Payment Voucher, is also easier on the pocketbook than paying one large lump sum at the end of the year. The 1040-ES Payment Voucher (available through the



IRS) comes in coupon form, listing dates when payments are due. Making these payments is not the same as filing a return; you still have to send in Schedule H at the end of the tax year. (The IRS will apply penalties if these estimated payments add up to a lot less than the total tax that is due when you file your return.) **Information current as of 2020.**

SUGGESTION: Set up a separate bank account to put money you withhold each payday. Otherwise, you may find yourself with a huge tax bill at the end of the year and no money to pay it!

In a nutshell, you need to take the following steps:

- ✓ Get a copy of **IRS Publication 926, “Household Employer’s Tax Guide”**. This publication, as well as other IRS tax forms, are available on the web at www.irs.gov or by calling (800) 829-3676.
- ✓ Get the Social Security number of your employees.
- ✓ **Have your PAs fill out a Form I-9**, which verifies that they are U. S. citizens or resident aliens who have the proper documents to work in the United States. These forms may be obtained from the U.S. Citizenship and Immigration Services of the Department of Homeland Security.
- ✓ **File Form SS-4** with the IRS to get your federal Employer Identification Number (EIN). You can get the form by calling the Internal Revenue Service (IRS). The IRS representative may even take the information over the phone. While you have the IRS on the phone, you may want to consider asking for Publication 926, Employment Taxes for Household Employers.
- ✓ **Report the hiring of your PA (in Ohio, on New Hire Reporting Form 7048)**. As of October 1, 1997, federal law requires all employers to report (1) the hiring of any new employee or (2) the return to work of any employee who has been laid off, furloughed, separated, granted a leave without pay or terminated from employment. This form must be filed within 20 calendar days with the Ohio New Hire Reporting Center. You can file this report electronically if that is easier for you. The email address and phone number for the Center is included in the reference list towards the back of the manual.

Tax forms are sometimes available at your local library or post office. They may also be found online at www.irs.gov or by calling 1-800-TAXFORMS.

- ✓ **Contact the Bureau of Workers' Compensation to request the proper forms you will need to use.** Pay the 15.3% combined Social Security and Medicare tax to the IRS. In most cases, you take 7.65% from your employee's paycheck and match it with 7.65% of your money.
- ✓ If your **PA is paid more than \$1,000 per calendar quarter**, you will need to save an extra 6.2% of the first \$ 7,000 of each employee's annual wages to go for federal unemployment taxes. Please note that you will receive a credit on your federal unemployment taxes if you pay your state taxes (at the rate of 2.7% of the first \$ 9,000 of each employee's annual wages) on time. This credit may reduce your federal unemployment tax to as low as 0.8%. In Ohio, state tax forms may be obtained from the Ohio Job and Family Services or online.
- ✓ **Have your PA fill out a Form W-4 if they want you to withhold state, federal and city income taxes. Keep this form on file.** According to IRS Publication 926, Employment Taxes for Household Employers, you do not have to withhold federal income tax unless the employee asks you to and you agree. It is suggested that a PA who does not want these taxes withheld should put in writing that you are not liable for withholding them. Check with your local city income tax office, because you may be responsible for local city and school taxes even if you do not pay state and federal taxes.
- ✓ **Attach Schedule H to your Form 1040 or Form 1040A federal income tax return.** If you do not file a Form 1040 or 1040A (for example, because you have no income that is taxable), you still need to send in Schedule H. (Even if you have no taxable income, it is a good idea to file a Form 1040A with Schedule H.)
- ✓ If you use Form 941 to pay taxes (Social Security and Medicare) you need to fill out Schedule R (Form 940) quarterly. If you fill out this form do not fill out Schedule H.
- ✓ **File a year-end Form W-2** and give a copy to your PA by January 31 of each year.

HINT: In Ohio, if you pay Ohio Unemployment taxes, you will reduce your Federal Unemployment of 6.4% to 0.8% – a savings of 5.6%.



TIPS: Tax forms are sometimes available at your local library or post office. They may also be found online at www.irs.gov or by calling 1-800-TAXFORMS.

By applying for an **Employer Identification Number**, you are putting your name in “the system,” and you **should automatically receive the forms you need**. If not, the IRS is only a toll-free phone call away! Be assured the IRS and other departments of taxation are more than happy to send you the latest forms and to answer any questions you may have.

If you are totally confused after talking with the IRS, check with a local Center for Independent Living or an accountant who understands household employee taxes. They may have had experience in dealing with employer taxes. It may also help to talk with someone who is already working with a PA and paying employer taxes. Your funding source may have names of fiscal intermediaries who may be able to help you (for a small fee) with all your payroll and employer reporting responsibilities if you would rather let someone else handle the finances.

Remember: It is your responsibility to make sure you are up to date on the reporting requirements and using the most current forms, as they change from time to time.

**For information on Ohio tax responsibilities contact:
Ohio Department of Job and Family Services at (614) 466-2319 or www.ohio.gov**

Your Notes

Protect Yourself

The next few paragraphs deal with steps you should consider taking to protect yourself as much as possible from risks you may face as an employer. Sometimes these steps are time consuming, but it is better to take time early in the game rather than to pay dearly later.

Background Checks

Home health agencies are required to do background checks on all their employees. **If you are interested in doing a check on your “private pay” PA, you can by contacting the Bureau of Criminal Investigation (BCI) through the State Attorney General’s office.** You can also ask your potential PA to bring you a copy of a recent background check.

Checks may also be available through your local police department or through other community agencies. Some county websites make criminal case dockets available if you want to do a quick check on your own. **Be aware that these websites may not contain complete information,** especially when it comes to misdemeanors or felonies conducted in other states or cities. Most checks involve a small cost and paperwork. Depending on the type of background check you do, it may take from two weeks to two months to get results back.

In Ohio, if your potential employee is a STNA (State Tested Nurse Aide), **you can call the STNA Registry to see if they are in good standing.** That number is (800) 582-5908. The information is also available through the Ohio Department of Health’s website (<http://www.odh.ohio.gov/>). You will need their Social Security number to access the registry.

Bonding

Bonding is a form of insurance that guards against a financial loss caused by the PA such as theft or embezzlement. Although bonding insurance is typically provided to agencies, private individuals may also be bonded. For more information, call your insurance agent or the Ohio Department of Insurance (800-686-1526 or www.insurance.ohio.gov).

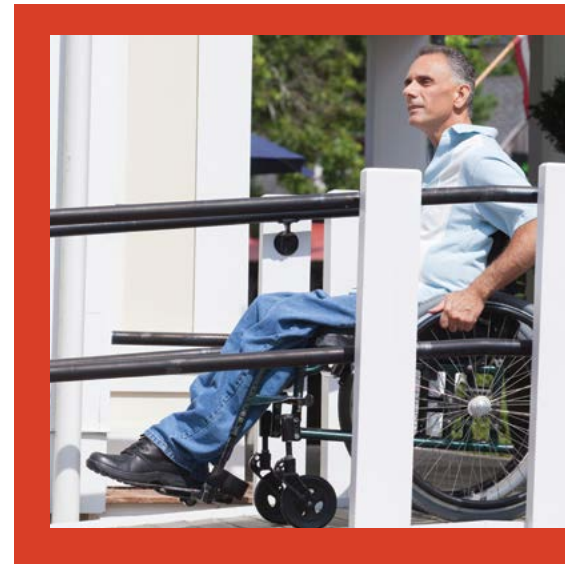


Employer Taxes

Although it **may be tempting to pay “under the table”** to avoid what seems like reams of paperwork, not to mention the additional costs involved, do not do it. **It is illegal and the consequences can be expensive.** What would happen if your employee were hurt on the job? What if you wanted to use your PA as a tax deduction? What if someone reported you to Social Security or your PA claimed that you never paid them? It is not worth the penalties you would be paying in the long run to save a little time and energy in the short run.

Drivers

If your PA is going to be driving you in their vehicle, **ask to see proof of paid insurance.** Check for proof of insurance every six months. Also get a copy of their current driver’s license. Decide from the beginning who will be responsible for maintenance costs. Will you be paying for mileage, gas or repairs? Will your PA? Or will you split the costs in some way?



If your PA is going to be driving your vehicle, report them to your insurance agent. Please note: the insurance company may run a check on their driving record to see whether they are eligible for coverage. The insurance company will be looking for any tickets and warrants. Insurance rates and coverage availability

may be affected by a person’s age and driving record. Discuss this issue with your insurance representative before you begin hiring so you will know what to look out for. Do not be surprised if the insurance company requires the driver to be at least 26 years old. Other questions/issues which should also be addressed in your working agreement:

Your Notes

- Who pays if the PA gets a speeding or parking ticket during the course of the workday? (the answer to this question should be that the PA pays for any costs due to illegal actions, i.e. speeding)
- Can the PA use your vehicle for personal use during non-work hours?
- If so, do you need to be notified when and where your vehicle is being taken?
- Will the PA keep a vehicle key at all times?
- Does the PA need to turn in gas and repair receipts?

Firing

Nobody likes to fire an employee. Unfortunately, you may find yourself in a situation where you have no choice.



The time to plan for this possibility is before you run into trouble. Always have enough regular employees, backup employees and friends so the loss of one person, for whatever reason, will not cause your whole support system to fall apart. People will come and go, and you will need to replace them. By maintaining a large enough network, you can choose to be a little picky about who works for you.

If your PA is doing something that you feel is incorrect or annoying, gently explain how you would like it done instead. Sometimes it is just a matter of explaining the reason why you need something done a particular way. Listen with an open mind to your employee's suggestions as well.

For more serious problems, you may want to schedule a meeting with your employee, preferably at the end of the shift. Explain in a non-accusatory, factual way what his or her behavior is and why it is unacceptable. You can invite an explanation by making an observation or asking a neutral, open-ended question, such as "I notice that you've been late a lot this past week. Is there something I should know about?" Try to discuss the matter calmly and plan together how to



improve the situation. You may issue a warning that if the problem continues, it may lead to dismissal. If the problem is serious enough, you may want to put the warning in writing and have the employee sign it.

Some problems can be documented (for example, calling in sick a lot or often showing up late). In such cases, write down in a notebook the dates and what happened. Later, if you do have to fire the person and he or she files for unemployment compensation, this log may be able to show that you were justified in letting your employee go.

If you feel your safety or property is in danger, act immediately. If possible, alert your other PA providers so they can cover the hours of the person you are letting go. That way you can concentrate on what you have to do, rather than on who is going to put you to bed.

If you have good relationships with your other employees, as well as a strong network of friends, people may even encourage you to fire someone who is not working out. They may also be glad to fill in until someone else is hired.

Depending on the situation, you may want to give your employee notice of the dismissal in person, or you may choose to handle the matter over the phone. If you fire an employee in person, consider doing so at the end of a shift rather than at the beginning. The person you are firing may be upset. You may feel more comfortable if you have a friend or family member nearby. If you feel threatened in any way, you can call the police.

Whether you fire your employee in person or by phone, always follow up with a letter and keep copies of your correspondence.

Get back any keys or personal property you may have given the PA. Consider changing your locks and security codes. You will also need to take the person off your insurance policy if they drive for you. If you owe the PA a final paycheck, have it ready or specify when it will be mailed.

SUGGESTION: *Any correspondence at this point should be sent Certified Mail, asking to have the individual sign for receipt of the letter.*

Here is an example: “your final check will be mailed within 24 hours as long as all keys and property have been returned.”

If your employee files for unemployment compensation, you will be mailed a notice of the claim. Your employee must list all

employers, both current and past, when filing the application. Be sure to respond to this notice, even if the employee has not worked for you for a while. If you do not respond, the Bureau will automatically rule in favor of the ex-employee. When writing your response, be factual and give examples of your reasons for the dismissal. If a reason severely affected your life or safety, state that fact in detail. For example, if your PA was frequently late in getting you out of bed in the morning, you could say, “My former employee was let go because he or she was an hour late three times a week. I was therefore continually late for work. If the situation had continued, I would have been fired.”

SUGGESTION: Make a written record (“paper trail”) of important information, such as payroll, job duties, disciplinary actions, and so forth. When in doubt, write it out!

Your Notes



Reducing the Stress Level

Working with a PA can be a freeing, yet stressful, experience. Along with the flexibility and control you gain over your life, you also end up with a huge amount of responsibility. At any time, someone can call and say, “I can’t work tonight,” and you are the one who has to do something about it. There are some steps you can take to make the process easier on yourself:

Go with the flow!

Sometimes things happen and getting all upset does not make it any easier. Do what you can to resolve the problem. Do not spend time and energy worrying when the same time and energy could be spent resolving the issue.

Prioritize.

If you have lots to do and know that you cannot possibly get to it all, make a mental or written list of what is most important. Then tackle your list one item at a time starting from the highest priority.

Plan ahead.

Periodically ask yourself whether you have enough assistants. If not, do something about it right then; do not wait for a crisis. Have a contingency or backup plan.

Delegate!

Delegating does not mean giving up control. It simply means taking a look at your PA’s strengths and interests and using them to make life easier. For example, if you hate doing payroll, teach a PA to do it if he or she has a knack for numbers. You can then review it before you sign checks.

Use the Five-Year Rule.

When something bothers you about someone or something, ask yourself: How important is it? Will it matter five years from now?



Take time out for yourself.

Treat yourself! Be good to yourself! You do not even have to spend lots of money. Maybe it is enough to get out of the house and enjoy the outdoors or to splurge on a double chocolate ice cream cone. Listen to your favorite music. Read a good book.

Eat regular meals and get a good night's sleep.

You will feel much less overwhelmed if you can stick to your routines and take care of your basic needs.

Try visualization and go on a mental trip.

Imagine yourself in a better time or place. Do you have a favorite memory? Close your eyes and relive it all over again.

Talk to someone.

You are not alone. If you can't visit in person, there is always the phone, email, social media and Zoom calls. Find someone you trust to help you problem solve issues or decrease loneliness. One of the worst feelings is that you are totally isolated. Don't let this happen to you!

Take three deep breaths.

It really does work!

Your Notes

Dream and Reality

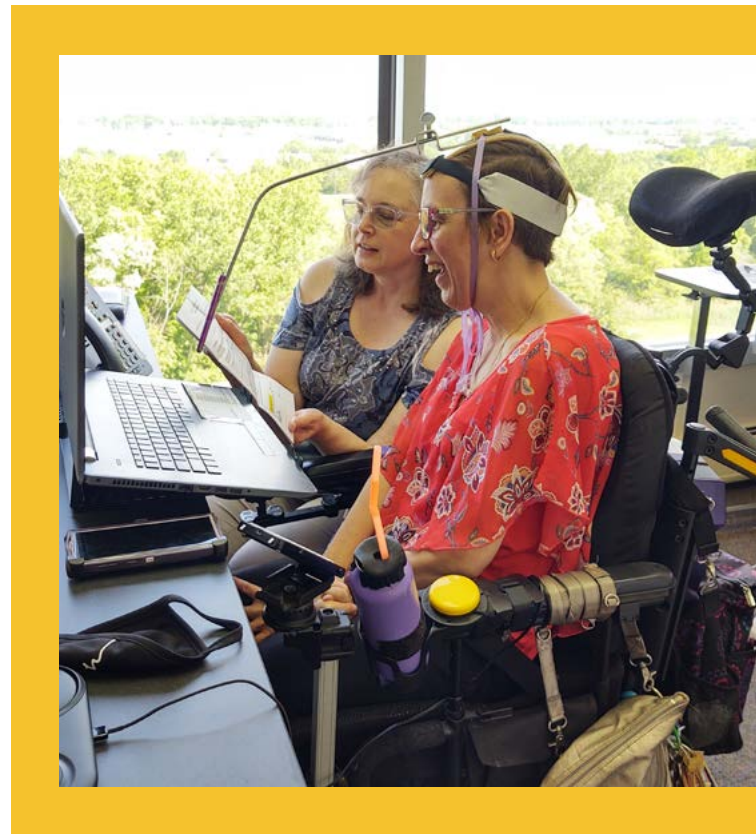
In theory, **personal assistance services are a wonderful thing**. With help from personal assistants, **people with disabilities (of all ages) are able to be part of their community**, and daily living events such as work, shopping, going to church, volunteering or getting together with friends and family. When employers and personal assistants respect each other, work well together and are committed to each other's goals, the resulting relationships can be strong and long-lasting.

In an ideal world, people with disabilities would have no trouble finding responsible, caring assistants to work with them at times they choose. They would have skills needed to manage caregivers. Conflicts would be handled in positive ways. Assistants would always show up and on time. People would have enough funding to buy services they need, and paperwork would be minimal.

Then there is reality ...

Hiring and working with your own PA can increase your independence and choices in your life. But it is **HARD WORK!** **In hiring assistants, you may take on employer responsibilities** such as: handling labor relations, training, managing payroll, withholding taxes, and assuring reliability and quality of service. Depending on the level of assistance needed, managing your support system can almost be a full-time job in itself, not to mention your other daily activities. **Don't let this scare you off though because your life can be so much fuller!**

When in doubt ... consider the alternatives.



The Future: What Can We Do About PAS?

We live in a time of great change. Legislation affecting the lives of people with disabilities is in the forefront on local, state and national levels.

Advocacy efforts to increase community-based and consumer-directed options for **people with disabilities are working**. Your voice is being heard but change continues to be slow. Legislators, decision and policymakers are beginning to listen to consumers and their advocates. As a result of advocacy efforts, initiatives to increase consumer-directed services are included in many of the Medicaid-funded PAS programs. Medicaid Buy-In for Workers with Disabilities is now a reality in Ohio. Other programs such as the HOME Choice Program, help individuals to move out of nursing homes and back into their own apartments or homes. These initiatives and programs are all based on the premise that people with disabilities want to stay in communities of their choice and have control over their lives. It makes sense.

We have come a long way, but we still have work to do. Consumer advocates, their families and other stakeholders continue to educate policymakers on the importance of programs that increase choice and put control back into the hands of the consumer.

Direct workforce shortage task forces in communities and around the state continue to look for ways to increase consumer-directed options and address direct-care workforce capacity and issues. These initiatives will make life easier for your PA, which in turn, will make life easier for you.

We need to continue to speak out and educate policymakers in order to insure continued expansion of community-based options. **Now is the perfect time to become involved!**

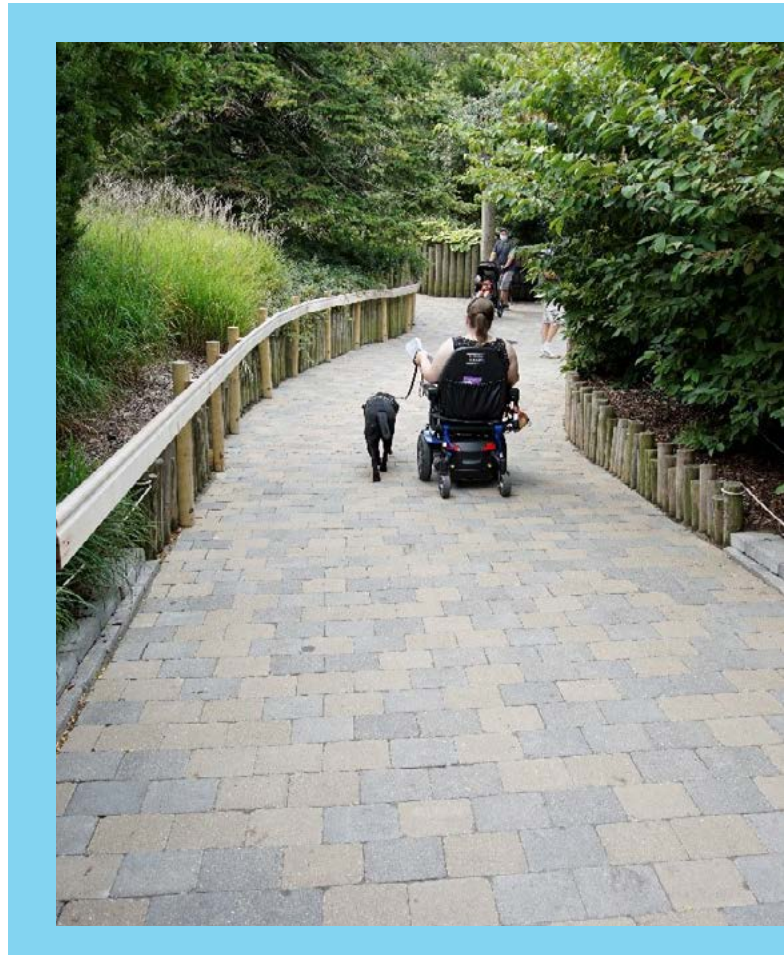
Find out what others are doing to address the needs for personal assistance services in your community or state. Many disability or age-related groups/ associations do some sort of legislative advocacy. They would be happy to have your help. **Your opinion counts! It is important that your voice be heard.**



In Closing

Although this manual is filled with helpful hints, points to ponder, and other tidbits of information, it is only a guide. Your circumstances are unique! Write in the wide margins of this manual, underline or highlight useful sections, and cross out others that are of no use to you. In other words, **take charge and make it your own personal guide to PAS management.**

GOOD LUCK!!



Your Notes

Your Notes



Resources

The following are a sample of resources available to you. Please consider them a starting point for more information. If they do not have the answer to your question, please consider asking them if they have any suggestions of who else you can ask or talk to and get that contact information from them.

NATIONAL:

Disability and Aging Resources

Alzheimer's Association
800-272-3900
www.alz.org

American Cancer Society
800-227-2345
www.cancer.org

American Council of the Blind
800-424-8666
www.acb.org

American Diabetes Association
800-342-2383
www.diabetes.org

American Kidney Fund
800-638-8299
www.kidneyfund.org

American Liver Foundation
800-465-4837
www.liverfoundation.org

American Parkinson's Disease Association
800-223-2732
www.apdaparkinson.org

Arthritis Foundation
800-283-7800
www.arthritis.org

Christopher & Dana Reeve Foundation
800-225-0292
www.christopherreeve.org

ElderCare Locator
800-677-1116
eldercare.acl.gov

Epilepsy Foundation
800-332-1000
www.epilepsy.org

ILRU (Independent Living Research Utilization)
713-520-0232
www.ilru.org

M.S. Association of America (MSAA)
800-532-7667
mysaa.org

Muscular Dystrophy Association
800-572-1717
www.mda.org

National Alliance on Mental Illness (NAMI)
800-950-6264
www.nami.org

**National Council on
Independent Living**

212-207-0334

www.ncil.org

National Easter Seals Society

800-221-6827

www.easterseals.com

National Federation of the Blind

410-659-9314

www.nfb.org

**National Multiple
Sclerosis Society**

800-344-4867

www.nmss.org

Paralyzed Veterans of America

800-424-8200

www.pva.org

**Substance Abuse &
Treatment Information**

800-662-4357

www.samhsa.gov

**United Cerebral Palsy
Associations**

800-872-5827 (800-USA-5UCP)

www.ucp.org

Government Resources

**Center for Disease Control,
National HIV/ AIDS/
COVID 19 Hotlines**

800-232-4636

www.cdc.gov

**Equal Employment
Opportunity Commission**

800-669-4000

www.eeoc.gov

Internal Revenue Service (IRS)

www.irs.gov

General Information: 800-829-1040

IRS Tax Forms: 800-829-3676

Long Term Care Information

Paraprofessional Healthcare Institute

718-402-7766

www.phinational.org

**United States Citizenship and
Immigration Services**

800-357-2099

www.uscis.gov

OHIO:

**Disability and Aging
Resources**

Assistive Technology of Ohio

800-784-3425

<https://atohio.org>

Brain Injury Association of Ohio

614-481-7100

www.biaoh.org

Centers for Independent Living:

• **The Ability Center of Greater Toledo**

866-885-5733

www.abilitycenter.org



- **Access Center for Independent Living**
Voice: 937-341-5202
www.acils.com
- **Independent Living Center of North Central Ohio**
419-526-6770
www.ilcnco.org
- **Center for Independent Living Options**
513-241-2600
www.cilo.net
- **Linking Employment, Abilities & Potential (LEAP)**
216-696-2716
www.leapinfo.org
- **Mid-Ohio Board for an Independent Living Environment (MOBILE)**
614-443-5936
www.mobileonline.org
- **Services for Independent Living**
216-731-1529
www.sil-oh.org
- **Society for Equal Access**
330-343-9292
- **Southeastern Ohio Center for Independent Living (SOCIL)**
740-689-1494
www.socil.org

- **Tri-County Independent Living Center**
330-762-0007
www.tcilc.org
- **Western Reserve Independent Living Center**
330-372-3325
www.wriloc.org

Easter Seals (Voice/TTY)

Central and Southeast Ohio,
614-228-5523
Northern Ohio, 440-324-6600
Goodwill Easter Seals Miami
Valley, 937-461-4800

Paralyzed Veterans of America, Buckeye Chapter

800-248-2548
www.buckeyepva.org

Government Resources

Bureau of Workers' Compensation

800-644-6292
info.bwc.ohio.gov

Civil Rights Commission

888-278-7101
www.crc.ohio.gov

Ohio Association of Area Agencies on Aging

614-481-3511
www.ohioaging.org

Ohio Association of County Boards

614-431-0616
www.oacbddd.org

Ohio Attorney General's Office
800-282-0515

Ohio Attorney General's Office BCI
740-845-2000

Ohio Department of Aging
800-266-4346
www.aging.ohio.gov

**Ohio Department of
Developmental Disabilities**
800-617-6733
www.dodd.ohio.gov

Ohio Department of Health
614-466-3543
www.odh.ohio.gov

**Ohio Department of Jobs
and Family Services**
614-466-6282
<https://jfs.ohio.gov>

Ohio Department of Mental Health
877-275-6364
www.mha.ohio.gov

Ohio Department of Medicaid
800-324-8680
www.medicaid.ohio.gov

Ohio Department of Taxation
800-282-1780
www.tax.ohio.gov

**Ohio Developmental
Disabilities Council**
800-766-7246
www.ddc.ohio.gov

**Ohio Division of Prevention,
Infectious Disease Control**
800-282-0546
www.odh.ohio.gov

Ohio New Hire Reporting Center
888-872-1490
www.oh-newhire.com

**Opportunities for Ohioans
with Disabilities (OOD)**
800-282-2695
www.ood.ohio.gov
(Vocational Rehabilitation
and PCA Programs)

State of Ohio Information
www.ohio.gov

**Statewide Independent
Living Council**
800-566-7788
www.ohiosilc.org

**STNA (State Tested Nurse
Aides) Registry**
800-582-5908
bit.ly/STNA-Registry

Legal Resources

Disability Rights Ohio
614-466-7264
www.disabilityrightsohio.org

Long Term Care Resources

Long-Term Care Ombudsman
800-282-1206
www.ltcoho.org



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Appendix A – Examples of Want Ads

Female personal care attendant for woman with disability. Monday-Friday, some weekends. 7 – 9:30 \$10/hour. 555-1234

Driver needed: mornings, some evenings and weekends. Flexibility a must. Call 555-1234

Attendant wanted: P/T work with adult with disability. Weekday mornings. Call 555-1234

Caregiver wanted for elderly male. Possible live-in. Non-smoker. References and salary requirements to PO Box 9999, Cleveland, OH 44101

Aide wanted: personal care, light housekeeping, meal prep for 45 yr old male with a disability. 20 hrs/wk. Salary negotiable. Driver preferred. References required. For more info, call 555-4321

PT assistant/aide for active woman with a disability. Help with grooming, housework and getting around. Interesting, flexible work. Will train. Call 555-4123

Child care needed. Weekdays, some evenings caring for child with cerebral palsy. Ability to lift 75 lbs. a must. Will train. Westpark area. Call 555-1234

Appendix B – Application for Employment

Name _____

Address _____

City _____ State _____ Zip Code _____

Daytime Phone _____ Alternate Phone _____

Times you are able to work:

Weekdays 7 a.m. to 12 p.m. 12 p.m. to 5 p.m. After 5 p.m.

Saturday 7 a.m. to 12 p.m. 12 p.m. to 5 p.m. After 5 p.m.

Sunday 7 a.m. to 12 p.m. 12 p.m. to 5 p.m. After 5 p.m.

TRANSPORTATION

Do you drive? Yes No

Do you have reliable transportation? Yes No

Do you have a valid driver’s license? Yes No

EDUCATIONAL BACKGROUND

Name of School	Dates of Attendance	Major Field	Degree Earned
High School			
College			
Vocational School			
Other			

Appendix B – page 2

EMPLOYMENT HISTORY

Employer's Name _____

Job Title _____

Address _____

Phone _____ Supervisor's Name _____

Employment Dates _____

Reason for Leaving _____

Employer's Name _____

Job Title _____

Address _____

Phone _____ Supervisor's Name _____

Employment Dates _____

Reason for Leaving _____

May I contact your current or past employers? Yes No

Please list two professional references and one character reference (with phone #)

Are you legally able to work in the United States? Yes No

Signature: _____ Date _____

Appendix C – Reference Release

To: _____

I, _____

have applied for a position as a personal assistant for _____

_____ and have given your name as a reference. I am giving you permission to provide information regarding my character, dependability and/or performance.

Thank You.

Signature of Applicant

Date

Appendix D – Examples of Interview Topics

Name of Applicant _____ Date _____

The following are examples of topics to be discussed during the interview.

- ✓ Review job description
- ✓ Job duties
- ✓ Daily routines
- ✓ Your expectations of your staff and providers
- ✓ Their expectations from an employer
- ✓ About your disability
- ✓ Why the applicant wants this job
- ✓ Applicant's job history
- ✓ Applicant's interests and goals
- ✓ Applicant's communication and problem-solving skills
- ✓ How does the applicant handle constructive criticism
- ✓ Pay: amount per hour, withholding of taxes, payment schedule (weekly, bi-weekly, on what day)
- ✓ Work hours and days
- ✓ Other duties, i.e., are they able to substitute or back up another PA, are they available to travel if needed, or can they help with paperwork if needed etc.

Appendix E – Examples of Interview Questions

Here are a few questions to get you started. You will think of plenty more that pertain to your particular situation. Remember to ask questions that have to be answered with more than a “yes” or “no.” It is important to ask thoughtful questions so you have a good idea of whether this is someone you want to work with or not.

1. Tell me a little about yourself.
2. Do you have experience with helping someone with a disability? Give me some examples.
3. What have you liked best about the work you have done in the past? Liked least?
4. What hours are you available to work? How flexible is your schedule? For example, could you be here at 7 a.m. on weekdays or at 8 a.m. on Saturdays?
5. Are you available for additional hours? How much notice would you need if I need extra help?
6. Do you think you would be able to transfer me with a Hoyer lift? Sliding board? Pivot transfer?
7. Have you pled guilty or been convicted of a felony?
8. How do you handle differences of opinion with your employer? Can you give me some examples?
9. How do you handle constructive criticism? Please give me an example.
10. Do you feel comfortable bathing someone or assisting with bowel and bladder routines?
11. I need a driver with a clean driving record. Will there be any problems when my insurance company runs a check on your driving record?
12. Can you drive a vehicle with a manual transmission (stick shift)?
13. Do you have experience with city or long-distance driving?
14. Are you available for out-of-town travel? Would you be able to stay overnight? How much advance notice would you need?
15. What supervisory style works best for you? Should I give you lots of supervision and oversight? Give you a list of tasks and let you do your thing or somewhere in-between?
16. Are you a smoker? I have COPD and asthma and have trouble breathing around cigarette smells. I also have problems with perfumes. Are you ok with not wearing perfume or cologne when working with me?

Appendix F – Questions to Avoid

The questions that follow can be considered discriminatory if they are asked prior to selecting someone for employment. The questions are “off-limits” because they can result in discrimination against certain individuals, even if that is not the intent in asking. These questions do, however, involve issues that are valid concerns in looking for a personal assistant. The best way to handle them, as shown in the sample ads and interview questions, is to identify and state clearly from the beginning any requirements of the job that involve any of these topics. Also, you cannot ask for a photograph of an applicant as part of the selection or hiring process.

1. What is your age or date of birth?
2. What religion are you?
3. Do you have children under the age of 18? How many children do you have? What ages are your children? What arrangements will you make for the care of minor children?
4. What country are you a citizen of? Where were you born?
5. How is your credit rating?
6. Do you own your home? Do you own a car?
7. What is your eye color? What is your hair color?
8. Do you have friends or relatives who work for me?
9. Have you ever had wages garnished?
10. What is your height and weight?
11. Did you receive an honorable discharge from the military?
12. What is the lowest salary that you will accept?
13. What is your maiden name?
14. What is your marital status?
15. Are you “Mr.,” “Ms.,” “Miss,” or “Mrs.”?
16. Do you belong to any organizations?
17. What is your political affiliation?
18. What is your race?
19. What is your sex/gender?
20. What is your spouse’s name?
21. What is your spouse’s employment?
22. Are you widowed, divorced or separated?

This list, which appears here in slightly modified form, is printed with the permission of the South Carolina Developmental Disabilities Council.

Appendix G – Job Duties Worksheet-1

This worksheet is a general list of duties and responsibilities that you can fill out before the interview. There is room for you to take notes during your interview and use to compare candidates later.

Days needed:

Hours Needed:

Dressing: _____

Bathing: _____

Grooming: _____

Routine Skin/Hair Care: _____

Appendix G – page 2

Toileting: _____

Medications: _____

Exercise: _____

Meal Preparation: _____

Eating/Feeding: _____

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Housekeeping/Laundry: _____

Shopping and Errands: _____

Transportation: _____

Adaptive Equipment: _____

Support Animals: _____

Other: _____

Appendix H – Job Duties Worksheet-2

This is an example of family's job duties checklist/worksheet that is used on a daily basis.

PERSONAL CARE & TREATMENT OF SAM

DRESSING

1. Following is a list of items you will use for dressing.
 - Diaper, Liner & Wipes
 - AFOs, Socks, Shoes
 - Undershirt (optional for weather)
 - Shirt, Pants
 - Gauze & Tape for G-Button
2. Take care to smooth out his socks when putting his AFOs on. Be sure that the ankles are properly seated in the boot. Allow enough slack in the sock at the toe area.
3. Protect his dignity by affording him as much privacy as possible (this includes visibility, verbal communication & physical contact).
4. Explain what you are doing so there are no surprises.
5. Be sure you have the supplies you need to complete the task.
6. Take care when fitting the diaper to prevent bunching or gaps.

DRESSING

1. Following is a list of items you will use for toileting.
 - Diaper, Liner & Wipes
 - Under pad
 - Gloves
 - Potty Chair
2. Follow the schedule outlined for Sam
3. Protect his dignity by affording him as much privacy as possible. (this includes visibility, verbal communication & physical contact).
4. Explain what you are doing so there are no surprises.
5. Be sure you have the supplies you need to complete the task.
6. Take care that the transfer is well thought out before you attempt to execute it.
7. Be sure Sam is comfortably positioned.
8. Do not leave him on for more than 15 minutes unless he indicates that he needs more time to complete the task or he needs to move his bowels and more time is warranted.
9. Log the results for future reference.

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10. Apply topical ointment to pilonidal sinus as needed.
11. Take care when fitting the diaper to prevent bunching or gaps.
12. Report any unusual stools (oversized, loose, hard) or strong smelling/dark urine to a Family member.
13. Catheterizations should be performed as outlined in the Catheterization Log.

BATHING

1. Baths should be done daily.
2. Determine method based on his health (bath or sponge bath).
3. Protect his dignity by affording him as much privacy as possible. (this includes visibility, verbal communication & physical contact).
4. Be sure you have the supplies you need to complete the task.
5. Explain what you are doing so there are no surprises.
6. Never spray him with water without testing it first.
7. Take care that the transfer is well thought out before you attempt to execute it.
8. Be sure he is comfortably positioned.
9. Allow him as much time as he wants when possible.
10. Never leave him unattended in the tub.
11. Take care that water does not go into his ears, nose or mouth.
12. Try to dry him off as quickly as possible so he doesn't get a chill.
13. Apply deodorants, creams, astringents, etc. per Hygiene instructions.

SHAVING

1. This should be done prior to his bath.
2. Be sure Sam is comfortably positioned & secure to prevent injury.
3. Explain what you are doing so there are no surprises.
4. Use the pre-electric gel before shaving.
5. Move razor in circle-like motions and try not to stay on any one place to prevent razor burn. Feel his face to know which direction the beard is growing.
6. Sam can have facial hair if he chooses.

MEDICATION

1. **DO NOT** administer non-prescription medicine to him without the knowledge of or instruction from a Family member or their designate.
2. Be sure to log the exact time the drug was administered & dosage.
3. Administer prescription medicines according to the schedule/route outlined.

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4. **DO NOT** call in prescription medicines. Notify the House Manager or a Family member as needed.
5. Any suspected reactions should be reported immediately to a Family member. In the event a Family member is not available take the appropriate steps to get help (i.e., Call Doctor, 911, Administer First Aid, etc.).

LIMITATIONS

1. Take into consideration the facts surrounding his medical & physical status before planning any activity. If you are unsure if he can engage in a chosen activity, ask the House Manager or a Family member. Be sure you are fully prepared.
2. Take added care when positioning him. Be sure his body is in alignment & secure when positioning him in his wheelchair and seating other than his wheelchair.

COMMUNICATION

1. **Always** give him the opportunity to make choices.
2. Allow him ample time to respond your questions ... it can be immediate or take up to 1 minute if he chooses to answer.
3. Learn to recognize his signals (i.e., Pain, Anger, Bathroom, Hungry, etc.)
4. **Always** telegraph what you are doing so there are no surprises (i.e., “I’m going to move you,” “It’s time to eat,” “It’s time to get ready to go to ... ,” etc.)
5. **Always** include him in the conversation.
6. TALK! TALK! TALK!

BOLUS ACCESS

1. Following are a list of items you will use when executing a bolus feed.
 - Bolus Connector (Straight bottom)
 - Syringe
 - Container for water or other beverage
2. **DO NOT** administer more than 2 ounces of liquid/Ensure faster than a **rate of two ounces per every 5 minutes.**
3. **When administering medicine via the tube use up to 6 ounces of water.**
4. Be sure his head is elevated if he is not in a sitting position. Watch Sam for signs of distress.

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5. If the tube becomes clogged, use very gentle pressure with the syringe plunger. If all the food, water or medication has not entered the stomach:
 - clamp the line
 - unplug it from the G-Button & drain the contents into a clean receptacle if it is medication for reuse, OR
 - if you cannot obtain a clean receptacle, drain the contents into the water container, OR
 - unplug it from the G-Button & drain the contents into the trash (ONLY IF THERE IS NO MEDICATION IN THE TUBE)

NOTE: **Never** use excessive pressure.

Appendix I – Example of a Job Description

PERSONAL ASSISTANT

General duties: To assist person with a disability with activities of daily living

Supervision by: Person with a disability

Persons supervised: None

Qualifications: Willingness to perform personal and household tasks for person with a disability. Willingness to learn. Dependability, flexibility, sensitivity

Duties (Activities with Which Assistance Is to Be Provided):

- Transfers
- Use of bed pan
- Personal hygiene, to include washing hair and bathing
- Driving (to/from work, errands and recreation)
- Washing breathing equipment
- Vacuuming
- Dusting
- Laundry
- Meal preparation and clean-up
- Paperwork (typing, filing)
- Cleaning bathroom once a week and a quick clean-up (toilet, tub and sink) each day
- Other activities as time allows

Days/ Hours to Be Worked:

- Monday, Wednesday, Friday:
6:30 a.m. to 8:00 a.m., 7:00 p.m. to 10:00 p.m.
- Tuesday, Thursday:
7:30 a.m. to 9:00 a.m., 7:00 p.m. to 10:00 p.m.
- Saturday:
9:00 a.m. to 11:00 a.m.
- Sunday
7:00 p.m. to 10:00 p.m.
- And other mutually convenient times as needed

Signature of Applicant/Employee

Date

Signature of Employer

Date

Appendix J – Working Agreement - 1

*This document is a working agreement between _____
_____ (Employer) and _____ (Employee)
outlining responsibilities and duties of all parties involved. Changes may be made to
this agreement if both employer and employee agree. Any such changes will be made
in writing, signed, and dated.*

DUTIES

The accompanying job description specifies duties and work days/hours.

Should the Employee be unable to finish a task or assignment in the time allotted, the work load will be prioritized by the Employer the employee. [MARK ONE]

Other duties may be assigned as long as time allows and both parties agree.

These hours may altered if both parties agree. For example, in case of illness, the hours may be rescheduled to another day.

The Employee may be hired for additional hours if enough notice is given and he or she is available. The Employee will not work for others during _____
SPECIFY TIME PERIOD].

PAY / BENEFITS

Payment will be made at the rate of _____ per _____, payable

by check in cash other _____

Paydays will be weekly bi-weekly monthly other (explain) _____

beginning _____ [DATE].

The employer will be responsible for handling:

Social Security City and State Unemployment Workers' Compensation

other _____

The Employer The Employee will report earnings and changes in earnings to Social Security.

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ILLNESS

Should either the Employer or the Employee become ill, that party will contact the other as soon as possible to determine whether the Employee should come to work.

HOLIDAYS / VACATION / TIME OFF

The Employee will have the following holidays off with without pay:

Notice of at least _____ must be given in case of vacation or termination. _____ pay may be given in lieu of termination notice.

EMERGENCY

In case of emergency, the following people should be contacted:

For the Employer: _____

For the Employee: _____

Notice of at least _____ must be given in case of vacation or termination. _____ pay may be given in lieu of termination notice.

The Employer and the Employee have agreed to these provisions. Should Conflicts arise, it is understood that both parties will try to work them out between themselves. If such attempts are not successful, a third party, such as _____, will be asked to mediate.

Signature of Applicant/Employee

Date

Signature of Employer

Date

Appendix K – Working Agreement - 2

The letter/working agreement below is a sample of a training tool one family gave to caregivers working in their home. It was important to the family that caregivers understood they needed to work within the family dynamics and to respect the fact that they were working in a family home. This is something that is not talked about enough and should be considered as you interview and/or train new providers.

Family Doctrine for Homecare Providers

This is a job. Please view it as such. Even though you are in a home setting and the main point of your job is to foster that feeling, it is **our** home and **our** Family. Help us maintain our standards and our lives by fitting into our world instead of requiring us to fit into yours. While we realize what goes on in your world affects how you are each day, we ask that you park it at the door when you enter our home. Of course, we will always embrace your good day the same as we hope you will embrace ours, however; your bad day should not be ours to shoulder even though you will at times shoulder ours. Know that how you manage your employment with us can add or detract from an already stressful situation and honor your commitment by following our house rules.

While it is true you are here to serve our children, they are a part of a Family and your job is to help them maintain their status within that structure even if you disagree with the decisions that have been or will be made for them. Your employment with us requires you to follow the “Life Plan” we have worked hard to develop for our children and to ensure their health and safety at all times. Understand that we may not adhere to the same standards we set for you but only because our role differs from yours where our children are concerned.

Like it or not, the profession you have chosen makes you a participant in our “Reality Show” and your contribution will be limited to the role you are being asked to play. Confidentiality is vital if you wish to enjoy lasting employment with our Family. What goes on in our home is about our lives and what you hear is what we think, desire and choose for our Family ... right, wrong or otherwise. Our experiences are not open for your scrutiny any more than yours are open for us to scrutinize. Your opinions are important to us but only if they address areas within the scope of your position. Know that what you do or do not do directly changes the dynamics of our Family unit at any given moment ... both good and bad. What you may view as insignificant could prove to be catastrophic for us. So please, discipline yourself so we won't have to.

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Your presence here will be warmly welcomed and appreciated far beyond your expectations as long as we mutually agree to work toward the common goal of helping our children be the best they can be with the abilities they have. But most of all, should your commitment to our children provide them with a life worth living, we will find a place for you within our Family.

HOUSE RULES:

ATTENDANCE

Schedules will be published for one month. Known times off should be declared well in advance of the schedule being published.

- Emergency absence should be reported immediately upon learning of the need to miss a shift. Every attempt should be made to speak directly to a Family member. If at all possible, secure someone to take your shift.
- Changes in your schedule are permitted when someone is available to work the shift and if the change has been noted on each of your schedules at the time of the change. A Family member must approve all schedule changes.
- Lateness can interfere with a smooth transition between shifts and cause undue hardship. If you know you are going to be late contact the person on shift and/or a Family member immediately to make arrangements.
- No Shows are not acceptable and will result in termination of employment.
- Shift schedules are subject to change on a daily basis to meet the needs of Ronald or the Family. You may be asked to work additional hours prior to your shift or you may be asked to stay past your shift once it has begun. These hours are optional and will not reflect on your performance should you choose not to accept them. Early dismissal is possible and does occur without compensation.

ACCESS & INFORMATION

- Access to the house should be limited to your shift unless otherwise instructed by the Family. Unauthorized access will result in immediate termination.
- ***Do not loiter*** before or after a shift. ***Only exceptions*** are to gather or share information regarding Ronald.
- ***Never*** enter any rooms that do not pertain to the direct care and treatment of Ronald without the permission of a Family member ***each time***.

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- No one is to enter the home unless authorized by a Family member. If you are unclear if an individual should be permitted to ask them to wait outside while you contact a Family member. Familiarize yourself with all extended Family members.
- **Never** have company over during a shift.
- If you are the last one to leave, be sure the house is secure (i.e., check doors, windows, thermostat, stove, etc.).
- **Never** give out information regarding Ronald or the Family unless instructed to do so by a Family member. Breach of confidentiality will result in immediate termination. Keep conversations on a “need to know” basis (i.e., how their day was, personal preferences, what they are feeling, etc.). All personal information questions regarding Ronald or the Family should be referred to a Family member.
- All decisions regarding changes in appointments or schedules for Ronald should be deferred to a Family member.
- Confidentiality is vital. Compromising the right to privacy could result in a meltdown of the Family unit.

PARKING

- Park in front of the house in the designated spaces, please do not park on the grass.
- If you have to park on the right side of the driveway, please park far enough back to allow easy access of the van lift and/or for me to “thread the needle” should I have to leave.
- You may be asked to move your car if you are relieving another aide and parking is limited.
- Snowy days you should park in the driveway unless the roads are already cleared and you can park in the spaces.

STORAGE OF PERSONAL ITEMS

- Coats, boots, hats, backpacks, etc. should be stored in Ronald’s bedroom closet.
- The stand in the kitchen can be used for daily items.
- See Food section for placement of those items.
- We are not responsible for items damaged or stolen while left in the home.

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FOOD & MEDICINE

- You are responsible for supplying your meals, condiments, beverages and snacks.
- Cold items may be kept in the refrigerator during your shift or stored in the fridge in the garage.
- You may use any items necessary to prepare and eat your food (i.e., plates, knives, cups, microwave, etc.) but be sure to put them in the dishwasher when done.
- Supplies necessary for storing leftovers should be brought from home (i.e., tin foil, Baggies, Tupperware, etc.).
- You are responsible for providing your own medicines (i.e., aspirin, antacids, cold remedies, etc.).

USE OF HOUSEHOLD PRODUCTS

- Paper towels, tissues, toilet paper, soap and cleaning products will be provided for use within the house for related duties.
- When restocking be sure to let me know. Indicate if the one you used to restock is the last one (NOTE: Use the last bit of a food item before restocking it, especially dated or perishable items (i.e., fruit, mashed potatoes, etc.).
- Unauthorized use or removal of any items not listed above will result in immediate termination and/or prosecution.

HOMEMAKER TASKS

- Shift Specific, Daily, Weekly and Ad Hoc Homemaker tasks are outlined in the Task List/Log section of this book.
- All damage incurred while performing routine tasks should be reported directly to the House Manager or a Family member at the time of the accident. If the House Manager or a Family member is not available it should be written down before the end of your shift.
- Homemaker tasks should never interfere with the care and treatment of Ronald.
- Ongoing failure to perform Shift Specific and Daily Homemaker tasks will be construed as inability to serve Ronald and may result in termination.
- Chronic neglect of Ad Hoc Homemaker tasks will result in specific assignment of the tasks.

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CELL PHONE USE

- Keep your cell phone on vibrate.
- Use should be kept to a minimum. Conversations should not exceed (5) minutes.
- Excessive use of a cell phone can result in a reduction of hours or termination.

EMERGENCY

- In the event of an emergency and if a Family member is present, defer to them for guidance.
- If a Family member is unavailable, determine the severity of the emergency.
- **Life threatening situations = Call 911.** Contact the House Manager or a Family member as soon as the Ronald is safe and you can use the phone.
- **Non-life threatening situations** = Assess the situation. Take the appropriate steps discussed with the family regarding the various situations that may arise. If the situation is unique to prior discussions, determine a plan of treatment and contact the House Manager or a Family member as soon as Ronald is safe you can use the phone.
- **BE SURE TO COMMUNICATE ALL OCCURRENCES TO A FAMILY MEMBER**

NATURAL DISASTER

- In the event of a natural disaster (i.e., Fire, Tornado, Flood, etc.) be sure you know where to take shelter within the house or the escape routes from any given room to exit the house. Discuss the various situations that may arise with the House Manager or a Family member.
- Take all items that are vital to Ronald's health and safety with you **only** if time permits. Rescue squads will help you get the items you need in the event you are forced into immediate evacuation.
- Contact a Family member as soon as Ronald is safe and you can get to a phone.

STANDARDS & ETHICS:

- Respect our values and possessions. Be observant or learn about them by asking before you act; never assume. Following is a list of topics, which you should discuss with the House Manager or a Family Member thus allowing you to adhere to standards that are vital to the presence and atmosphere desired by our Family.

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- Religious Beliefs (family's beliefs that you will need to respect)
- Codes of conduct including
- Appropriate language and topics of conversation
- Proper hygiene and dress
- Infection/Contamination Control (Hand Washing, Sanitizing Equipment, Food Handling, etc.)
- Call off policy (Illness, Doctors visits, Vacation, etc.)
- Acceptable noise levels pertaining to the shift you work
- What type of discipline to use
- Holding confidentiality
- Problem Resolution
- Expectations on personal behavior
- Environmental Cleanliness
- Material Possession Care and Treatment
- Accountability for Damage or Loss
- Be compassionate toward our Family's situation or status.
- Support the efforts of our Family to provide a safe and healthy environment for Ronald.
- Help Ronald be the best he can be with the abilities he has. If you are unclear of his limitations/abilities, discuss it with the House Manager or a Family Member. Be creative!
- Protect the integrity of our Family unit.
- Maintain Ronald's dignity.

COMMUNICATION

- **Always** give him the opportunity to make choices.
- Allow him ample time to respond your questions ... it can be immediate or take up to 1 minute if he chooses to answer.

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- Learn to recognize his signals (i.e., Pain, Anger, Bathroom, Hungry, etc.)
- **Always** telegraph what you are doing so there are no surprises (i.e., “I’m going to move you,” “It’s time to eat,” “It’s time to get ready to go to ...,” etc.)
- **Always** include him in the conversation.
- TALK! TALK! TALK!

ENERGY CONSERVATION

- TURN OFF the room lights upon leaving unless they are to be left on for safety reasons and electrical appliances when you are through using them or when leaving a room.
- If you open the doors or windows, make sure the heat/air conditioner is not on.
- Be conservative when raising or lowering the thermostat. Monitor the change to be sure you have hit the optimal range. Increase/decrease one degree at a time.
- Do not turn the water on and walk away or leave it run until you are ready to use it unless you are warming it up.
- Dishwasher should be run only when there is a full load unless otherwise instructed.
- Always double check that you have securely closed and locked the freezer door on the refrigerator in the basement before coming upstairs.
- Use the appropriate amount of cleaning products. Read the labels if you are unfamiliar with the product or ask the House Manager or a Family member.
- Re-stock perishables only when you have used the last of something.
- Do not empty the trash unless it is full.

I am signing to acknowledge I have received this document and understand its contents.

Signature

Date

Appendix L – Request Income Taxes Not Be Withheld

I _____ provide personal assistance services to my employer _____ .

I understand that all wages I earn are considered to be taxable income. My employer will deduct my share of Social Security (FICA) and Medicare taxes from what I earn.

I do not want income taxes withheld unless it is required to do so. If income taxes are not withheld, I understand that ***I am responsible*** for payment of all applicable income taxes.

Signature of Employee/ Personal Assistant

Date

Appendix M – Needs Checklist

	DAILY	WEEKLY	MONTHLY	OTHER
PERSONAL CARE				
Tub / bed / bath				
Shower				
Transfer				
Pivot				
Sliding Board				
Hoyer Lift				
Dressing				
Oral hygiene				
Hair care				
Nail care				
Assistance with medications				
Positioning				
Other				
Other				
Other				
MEAL PREPARATION				
ASSISTANCE WITH EATING				
HOUSEKEEPING				
Dusting				
Vacuuming				
Kitchen area				
Bathroom area				
Bedroom area				
Cleaning				
Kitchen area				
Bathroom area				
Bedroom area				
Laundry				
Other				
Other				
Other				
GROCERY SHOPPING				
DRIVING				
KEEPING APPOINTMENTS				
OTHER				
OTHER				
OTHER				

Appendix N – Time Log

Day	Time In	Time Out	Time In	Time Out	Time In	Time Out	Time In	Time Out	# of Hours
Sunday									
Monday									
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									
Sunday									
Monday									
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									

**TOTAL
of Hours**

My signature verifies that this information is correct.

Name _____ Social Security # _____

Signature _____ Date _____

Additional information:



Ohio Developmental Disabilities Council

899 East Broad Street

Suite 203

Columbus, OH 43205

VOICE 614.466.5205

VOICE 800-766-7426 voice

TOLL FREE 800.766.7426

FAX 614.466.0298

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Ohio Developmental
Disabilities Council

www.ddc.ohio.gov