



Ucare

## **The Caregiver Guide**

### **Module 11**

## **Hiring, Training, and Managing Personal Assistants**

**Participant Booklet**

# UCARE Module 11: Hiring, Training, and Managing Personal Assistants

## PURPOSE

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Personal assistance services may be one of the important support systems that you have. This module is designed to help you learn how to advertise, interview, select, teach, supervise, resolve conflict, fire if necessary, avoid theft, and find funding.

## WHAT YOU WILL LEARN

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After completing this module, you will:

- Know where to advertise for applicants
- Learn how to interview and select personal assistants
- Identify the steps needed to teach new tasks
- Learn how to resolve conflict
- Understand how to avoid theft and fire, if necessary
- Learn what funding options are available

## WHY YOU SHOULD HIRE A PERSONAL ASSISTANT

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There are many good reasons to hire a personal assistant. Personal assistants can give you a much needed break and give you a chance to do other things. Personal assistants can also lighten your duties, take over private or difficult tasks, prevent or postpone your family member from going to a nursing home or other facility, and help your family member feel like less of a burden on you.

## POSSIBLE PROBLEMS TO CONSIDER

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- Less privacy with another person in your home
- Safety and security may also be concerns
- You may feel like you're not fulfilling your duty, but your duty is to provide love and make sure your family member's needs are met. You don't have to do everything yourself.
- Your family member may be resistant, but it will help if you discuss and make the decision together. You can offer to try having a personal assistant on a trial basis.

## WHAT TYPE OF PERSON ARE YOU LOOKING FOR?

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What qualifications or personal characteristics are you looking for? It's best if a personal assistant is at least 18 years of age. However, some individuals who are 16 or 17 may be suitable. A personal assistant should:

- Get along well and work closely with others
- Accept responsibility and want to learn the job
- Look beyond the disability to see the person
- Maintain clean personal habits
- Have reliable transportation

## DECIDE WHETHER TO HIRE STRANGERS OR FAMILY

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- Some people prefer family members because of the personal nature of the job
- Others feel that hiring someone else helps preserve their relationships
- There are advantages and disadvantages to both
- Once you know your personal assistance needs and the type of employee you want to hire, you need to get the word out!

## PLAN WHERE YOU WANT TO ADVERTISE

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Many people begin by using word-of-mouth. Tell your friends, family members, and other people who employ personal assistants that you want to hire a good person. The more people you tell, the more likely you are to find skilled applicants. Besides informal recruiting, you can use the following techniques.

List your job opening at:

- Schools and Colleges (Career/Personnel Offices)
  - Local Workforce Services
  - LDS Employment Services
  - Web sites such as [www.monster.com](http://www.monster.com), [www.ajb.dni.us](http://www.ajb.dni.us)
- Post flyers at:
- Center for Independent Living
  - Senior Citizen Centers, Aging and Retirement Organizations
  - Hospital, Nursing Homes, Rehab Centers, and Health Dept.
  - Library display area and Community Center
  - Malls, Apartment Complexes, and Grocery Stores



Ask local colleges and employment offices to post job notices. You can make up a flyer with a brief job description and your phone number (preferably with strips that can be torn off). Post your flyers at a variety of locations within your community.

## SCREEN APPLICANTS CAREFULLY

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Screen applicants over the phone first. Explain the job, the area where you live, and the salary. Ask if they have any experience with this type of work. If so, ask the

person to describe. Ask them why they want to apply for this position.

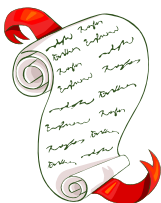
Some people feel like it is better to hire someone who is working for the money, than applicants who say they just love to take care of old people. One woman states, “I am the type of person that doesn’t want to be loved by total strangers. It’s better to find someone who needs the money as much as I need the help, rather than someone who wants to be an attendant to feel good about themselves.” Arrange for an interview only if you like what you hear. Be aware that many people make an appointment and don’t show, but you wouldn’t want to hire someone who isn’t dependable anyway.



It’s safer to meet people you are going to interview in a public place to protect your privacy and avoid theft. If you want to interview in your home, have someone else present. Let each person know you are careful about security. This may include fingerprinting and listing who you hire with a security agency or the police. This should discourage applicants you wouldn’t want working for you, it shouldn’t bother someone with nothing to hide.

## MAKE A LIST OF INTERVIEW QUESTIONS

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It will help if you make a list of questions you want to ask beforehand. Page 14 and 15 of your Participant Booklet have charts with these questions. Open ended questions are much better than yes/no questions at getting information.

### Suggested Interview Questions:

- Would you tell me something about yourself?
- What jobs have you had? How long did you work at these jobs?
- What did you like and what didn't you like about your jobs? Why did you leave your last job?
- Why do you want to work as a personal assistant?
- Have you been responsible for the welfare of another person before?
- Are you dependable and reliable? How long do you plan to work?



Ask lots of questions and watch the person's response.

Be observant as you interview. Watch for nonverbal and personal traits. Listen to what is said, how it is said, and what is NOT said. Sometimes silence is a good interview technique to get the person to talk and gather information.

### How much should you disclose?

- The applicant needs to know about all of the work (It's better to be clear in the beginning than have someone quit later)
- Explain the job, the area where you live, and the salary
- Interview more than one applicant
- Give yourself at least overnight before you make a decision
- Call business and personal references

## CHECK EMPLOYMENT AND PERSONAL REFERENCES

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Make sure you get at least two employment and two personal references from every person you are considering hiring. It is important to check both work and personal references. Possible questions to ask references:

- How long have you known the applicant?
- How would you describe the applicant?
- Is the person honest, mature, and dependable? Why or why not?
- Do you have any reservations about this person doing this type of work?
- Why did this person leave? Would you rehire the person? (Employers)
- Do you have any additional comments?

## TRUST YOUR INSTINCTS

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You are your best detection instrument. Your first reaction to people will generally predict your future ease with them. Take into consideration your “gut” reaction, the information you learned in the interview, and what his or her references said. The person or persons you ultimately hire should have:

- Good references and at least some experience
- A positive and pleasant attitude
- Good communication and listening skills
- An appropriate reason for applying for the job
- A clean and trustworthy appearance
- Respect for your privacy and confidentiality

If you have doubts, keep asking questions, checking references or consider hiring the person on a trial basis. Decide with the PA how long you think the trial period should last. At the end of that time you and/or the personal assistant can decide if you want to continue working together.

## PROVIDE WRITTEN MEDICAL INFORMATION

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After you have hired someone, you need to get ready. Written medical information helps your personal assistant know your family member's needs and what to expect. It is also helpful to list emergency contacts.

### Suggested Medical Information

- Basic information about disability
- Medication and possible side effects
- Diet restrictions
- Equipment and home arrangements
- What to do in case of medical situations
- Name and contact information for doctor
- Ensure all of the above is in written form

Now that you have hired someone and given them basic medical information, what are the typical steps to teach a new task to your personal assistant?

## TEACH IN SMALL STEPS

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### Basic Teaching Steps

- Introduce the task
- Provide written instructions
- Explain the steps in detail
- Demonstrate the task (you or another PA)

- Repeat the demonstration as often as needed
- Imitate, have the new PA try the steps of the task
- Refine and correct all steps
- Give feedback, praise or gently correct any mistakes

The training period will vary according to how many, how hard, and how urgent the tasks are. It could range from several hours to weeks. Everyone learns at their own pace. You may need to show tasks repeatedly. Give clear directions. Be patient.

## TRAIN EXPERIENCED PEOPLE ALSO

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- When you teach, show how to do the task the same every time
- Supplies and equipment you've used for years may be new
- You may like things done differently than people in prior jobs
- Don't assume a PA knows how to perform a task until you've seen it done

How often should you review work? What should you do if you find problems?

## REVIEW WORK FREQUENTLY

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- The more often the work is checked, the sooner a small problem can be fixed.
- Review:
  - Daily tasks/checklists every two weeks
  - Weekly tasks/checklists every month
  - Monthly tasks/checklists every three months
- If there is a problem, see if all the steps are included. Show PA which step is missing.

## WAYS TO HELP YOUR PERSONAL ASSISTANT FEEL AT EASE

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- Be patient with mistakes and questions: Something clear to you may not be clear to your PA
- Once a task has been learned, do not keep telling the PA how to do it
- Show appreciation for what your PA does well, praise often
- Be kind and respectful, but firm in letting the PA know that your relative's life IS his or her life and your PA is "assisting with" and not "directing" it

## USE "I" STATEMENTS

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- Clearly explain any issues
- Use "I" statements, rather than "You" statements
- Focus on your reaction and feelings, rather than your actions
- Listen to what your PA says

"I" statements are much better because they focus on your feelings, rather than "you" statements. For example, if you say something like, "I feel like I am not being treated with respect" it will probably be well received. On the other hand, if say something like, "You treat me like a child," Your PA may feel defensive and criticized. Even though you are discussing their behavior, the other person may feel less defensive if the focus is on your reaction and feelings, rather than their actions.

## RESOLVE DISAGREEMENTS AS THEY COME

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It is important to correct mistakes right away before they become habitual. Face each issue as it appears.

Be relaxed and clear when discussing the disagreement. Listen to what your PA has to say. Work together to solve the problem. Focus on finding solutions, rather than placing blame. Always attempt to create a win-win solution.

Try to remain calm even if the other person gets upset. Ask yourself who was at fault. It is much easier to resolve conflicts when at least one person is flexible, willing to listen, and consider alternatives.

If the PA is not willing to reach an agreement, it may be necessary to let that person go. What are some reasons you might have to fire a PA? These reasons may include if family member's health is at risk, if there is any type of abuse (sexual, physical, or emotional), or if the PA is using drugs or alcohol on the job.

It is best not to fire someone in front of others unless you think the person might become violent. If you are not concerned about your personal safety or property, conduct the firing in a calm, private, respectful, and clear manner. If you are unsure about how the person will react, have someone in another nearby room.

## PREFERRED WAYS TO END EMPLOYMENT

- Fire in private, with someone close, unless there are safety concerns
- Provide clear, valid reasons
- Use good eye contact and a firm voice
- Practice what you plan to say
- Ask for your keys and any other items that belong to you
- Conduct the firing at the end of the shift, if possible

One of the reasons you may have to fire someone includes theft.

What are some steps you can take to cut down on dishonesty? Know how much money you have and keep only a little on hand. If you must write a check, give out only one. If you have a live-in PA, set rules about food, visitors, etc. Setting rules and carefully watching behavior will help discourage dishonesty.

## WAYS TO CUT DOWN ON DISHONESTY

- Be alert. Let your PA know you will track mileage, drugs, calls, etc.
- Never leave money, jewelry or medications in plain view. Lock it up.
- Carefully control your checks and cash. Ask for receipts
- Don't give out your credit card or the number
- Avoid letting a PA use your auto, phone, or home for personal use

## BE CAREFUL BUT DON'T STRESS

- Don't let these last sections dampen your spirit
- Setting rules and carefully watching behavior will help discourage dishonesty

- It's better to be aware, and take precautions
- Be careful and do what you can to be safe, but don't worry needlessly

## ASK

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If you are now ready to hire, where can you find funding?  
There are a number of possible funding sources.

## POTENTIAL FUNDING SOURCES

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- Medicaid (1-800-662-9651)
- Medicare (generally short term) (1-800-633-4227)
- Private, employee or retiree insurance
- Veterans aide and attendant allowance (801-584-1294)
- Division of Services for People with Disabilities 800-837-6811 or visit [www.hsdspd.utah.gov/](http://www.hsdspd.utah.gov/)
- Long term care insurance
- Area Agency on Aging (1-877-424-4640)

Medicare will pay for licensed nurses, therapists and short term care prescribed by a doctor for medical reasons. Medicare and most insurance will not pay for custodial care (bathing, dressing, etc.). Medicaid usually covers more. The Medicaid Aging Waiver or the Medicaid Physical Disabilities Waiver will pay for personal attendant services if: 1) an individual qualifies for Medicaid and 2) would need to go in a nursing home if they didn't receive the personal care at home. The individual has control over selection, supervision and retention of the personal attendant. Your Area Agency on Aging (there are 12 in Utah) knows about funding options and can help. If your family member is not eligible for funding, consider bartering, using volunteers, or paying

for services. For example, one person with quadriplegia has an arrangement with a friend who has a brain injury who serves as a personal assistant in exchange for organizational help. It sounds perfect, but there are challenges. “It’s difficult to live 24 hours a day with someone who has physical impairments and it’s difficult to live 24 hours a day with someone who has a brain injury. However, it can work.”

There is a two page summary of the hiring and training process that we have covered today at the end of your participant booklet that you can use as a reference.

## REMEMBER YOUR STRENGTHS

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“You have the colors of a true champion, a hero. Were you born with these colors? No, I think you earned them. Whatever else happens as your life unfurls, you will have the strength and courage you need. Choose your own path. Believe in yourself. You have the power, insight, and wisdom to succeed. For yours are the colors of a hero, a true champion, a caregiver.” Judith Rappaport-Musson in *Eldercare 911*.

Remember that you have courage, strength, compassion, power and wisdom. Personal assistants can help you do even more.

## Screening, Interviewing and Checking References When Hiring Personal Assistants

<b>Screening Applicants</b>	<b>Tips for interviewing</b>
Screen applicants over the phone first	Be observant as you interview
Explain the job, where you live, and salary	Watch for nonverbal and personal traits
Ask if they have any relevant experiences. If so, ask to describe	Listen to what is said, how it is said, and what is NOT said
Ask applicant why they are applying.	Sometimes silence is a good technique to get the person to talk
Arrange for an interview, only if you like what you hear	Tell the applicant about <u>all</u> of the work
<b>Job Interview Questions</b>	Interview more than one applicant
Would you tell me something about yourself?	Give yourself at least overnight before you make a decision
What jobs have you had? For how long?	<b>Reference Check Questions</b>
Why did you leave your last job?	How long have you known the applicant?
Why do you want to work as a personal assistant?	How would you describe the applicant?
Have you been responsible for assisting another person?	Is the person honest, mature, and dependable? Why or why not?
Are you dependable and reliable?	Do you have any reservations about this person doing this type of work?
How long do you plan to work?	Employers – Why did this person leave? Would you rehire the person?
<b>The person you ultimately hire should have:</b>	
Good references and at least some experience	An appropriate reason for applying for the job
A positive and pleasant attitude	A clean and trustworthy appearance
Good communication and listening skills	Respect for privacy / confidentiality

## Training, Supervising, and Managing Personal Assistants

<b>Set a Trial Period</b>	<b>Provide Medical Information</b>
Set a trial period with the PA	Basic information about disability
At the end of the period you both decide if you can work together	Medication and possible side effects
<b>Basic Teaching Steps</b>	Diet restrictions
Introduce the task	Equipment and home arrangements
Provide written instructions	What to do in case of medical situations
Explain in detail the steps of the task	Name and contact information for doctor
Demonstrate the task (you or another PA)	<b>Review Work Performance</b>
Repeat the demonstration as often as needed	Daily tasks/checklists every two weeks
Imitate - have the new PA try the steps of the task	Weekly tasks/checklists every month
Refine and correct all steps	Monthly tasks/checklists every three months
Give Feedback, praise or gently correct any mistakes	The more often work is checked, the sooner a small problem can be fixed
<b>Tips for Supervising</b>	<b>Communication</b>
Be patient with mistakes and questions	Use “I” statements rather than “You” statements
Once a task has been learned don’t keep telling the PA how to do it	Highlight your reaction and feelings, rather than their actions
Show appreciation for what your PA does well. Praise often	Listen to what your PA says
Be kind and respectful	Clearly explain any issues
Let the PA know that your relative’s life IS his or her life and your PA is “assisting” and not “directing” it	