



You Are the Employer:

A Guide to Hiring and Managing Personal Assistant Services

A large, bold, black number '1' is centered within a large orange circle. The circle has a white outline and is set against a purple background.

Module One

Knowing What You Need and Want

YOU ARE THE EMPLOYER

A GUIDE TO HIRING AND MANAGING PERSONAL ASSISTANT SERVICES

Hiring personal assistants may seem overwhelming.

It does not have to be!

This guide was developed to provide you with the skills and resources you need to hire and manage your personal assistants.

Module 1: Identifying Your Needs and Wants

Module 2: Hiring a Personal Assistant

Module 3: Tax Considerations

Module 4: Employer Responsibilities

Module 5: Stress Management

Module 6: Communication Skills

Module 7: Additional Resources

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This guide can be made available in alternate formats upon request.

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TABLE OF CONTENTS

LEARNING OBJECTIVES	4
SECTION 1:	
INTRODUCTION	5
SECTION 2:	
NEEDS AND WANTS	5
SECTION 3:	
CREATING A NEEDS ASSESSMENT	6
REVIEW	9
DEFINITIONS	9
TASK CHECKLIST	10

LEARNING OBJECTIVES

AFTER COMPLETING MODULE 1, YOU WILL:

- **Clearly state your individual needs and choices.**
- **Complete a Needs Assessment to help plan for your personal assistance services and in training new employees to be personal assistants.**
- **Provide at least 3 examples of how to adjust personal assistance services as your needs and/or interests change.**

SECTION 1:

INTRODUCTION

Knowing what you need and what you want is the first step to hiring a personal assistant. Once you are clear about what you are looking for, you can begin the hiring process. This module will help you get started. Section 1 begins the process by asking you to answer some personal questions about your needs and wants. Section 2 discusses the importance of completing a needs assessment and walks you through how to complete the need assessment provided at the end of the module.

SECTION 2:

NEEDS AND WANTS

Begin by taking a hard look at what you need and what you want. When thinking about your needs, consider the following questions:

- **What do you do on weekdays? On weekends?**
- **What support must you have to accomplish this?**
- **What can you do on your own?**

A needs assessment is an essential tool to complete before you begin hiring people to assist you. It requires you to take an honest look at all of the support you need and to consider all of your interests. You may want a friend or family member to help you do this so you do not miss anything. As you hire someone to assist you, you will want to be as specific with your requirements as possible.

SECTION 3:

CREATING A NEEDS ASSESSMENT

A needs assessment is a list of all of the tasks you have to accomplish in a typical day. Consider everything you need to do, including those tasks you may be able to do on your own, but would prefer assistance with. This is important because the length of time it takes or the amount of energy you use to do something independently may be preventing you from accomplishing other goals. Remember, your needs will change overtime and the ability of your family members to support your needs may also change. It is important, therefore, to periodically review your needs assessment to make sure it is up to date.

The Needs Assessment at the end of this module provides you with a tool to evaluate your needs. It consists of two sections Household and Other Needs, and Personal Care, which are broken down by task areas. Each task area includes a checklist of possible support needs, and space to describe your needs. There is also room to include information regarding when a task should be completed, how much time it takes (per day or per week), and its priority level.

The more detailed you are with the task descriptions the easier it will be to develop a job description. After you hire a personal assistant, it can also be used to provide him or her with direction. Refer to this tool often, and ask someone who is familiar with your needs to assist you while completing the Needs Assessment.

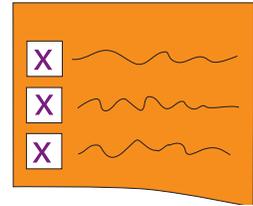
Tip:

Many people find that when they are first adjusting to living independently, it is better to have too much support than too little. Living independently is a big change from living with parents or in other places where support is readily available. Give yourself some time to figure out what support you require and then if necessary, make changes to make your plan work best for you.

THE GENERAL NEEDS ASSESSMENT

Task Areas

The Task Areas section lists the various activities that people need to accomplish in a typical day. Task Areas are organized by Household & Other Needs (e.g. meal preparation & eating) and Personal Care Needs (e.g. bathing).



Supports Needed

The Supports Needed section lists the various types of support that a person may need to complete a task. To identify what supports you need, place a check mark in the Supports Needed box next to the tasks specific to your needs. Keep in mind how your personal assistants are funded, and whether the supports you checked are essential to your needs.



Description / When

The Description/When section provides you with room to elaborate on the support needs you checked. You can explain the best way to perform these tasks and when you would like them accomplished. This section may help you decide how to break down tasks to be completed by specific personal assistants based on their talents and areas of skill (e.g. housecleaning or cooking).



Length of Time

The Length of Time section is where you can provide information about how long it will take to complete a task. It is a good idea to include length of time by minute or by day, as well as length of time needed per week. This section is also helpful for people applying for funding through certain waivers.



Priority Level

The Priority Level section provides you with space to list the level of priority or importance each task holds for you. This may vary depending upon individual choices. The following priority level scale can be used for this column:

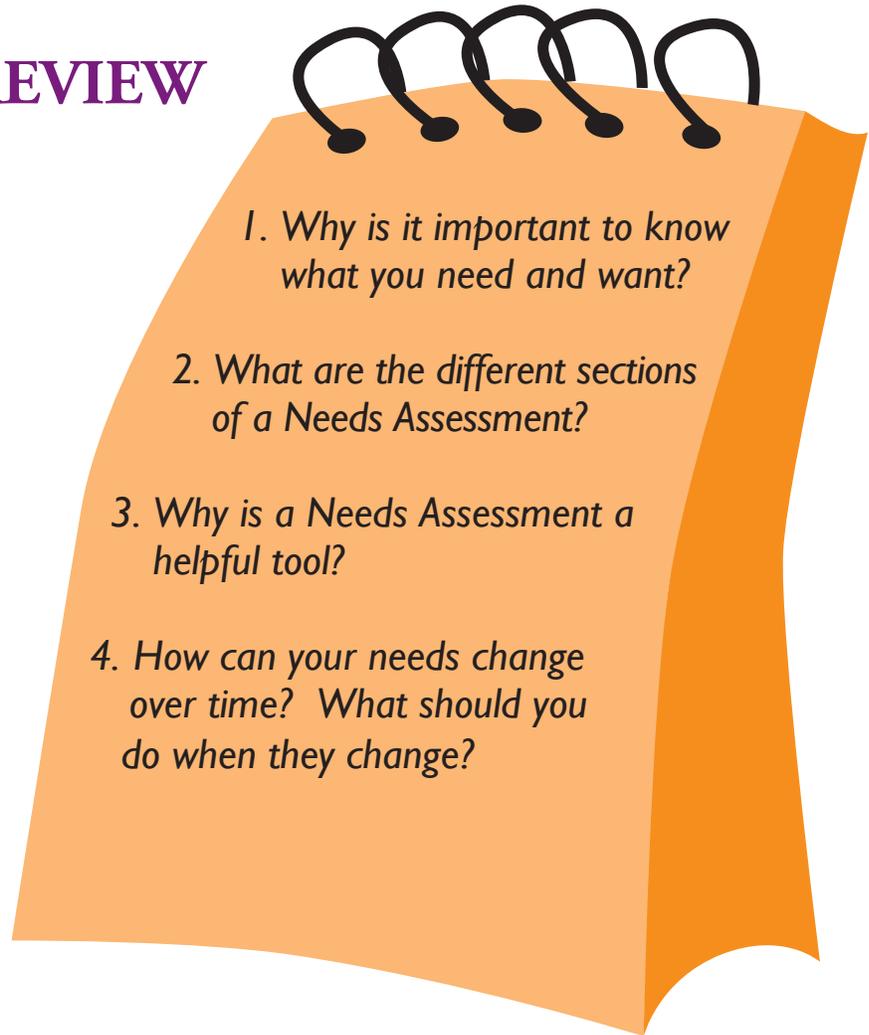
- 1 – Essential**
- 2 – Important**
- 3 – Nice**
- 4 – When Time Is Available**



This section will also help your personal assistant understand what is important to you. It is a great training tool for when you begin teaching new assistants about your routine for the day and/or week.

In the back of this module you will find a blank Needs Assessment for you to complete. Complete the Needs Assessment with as much detail as possible. You will then be ready to begin the hiring process!

REVIEW



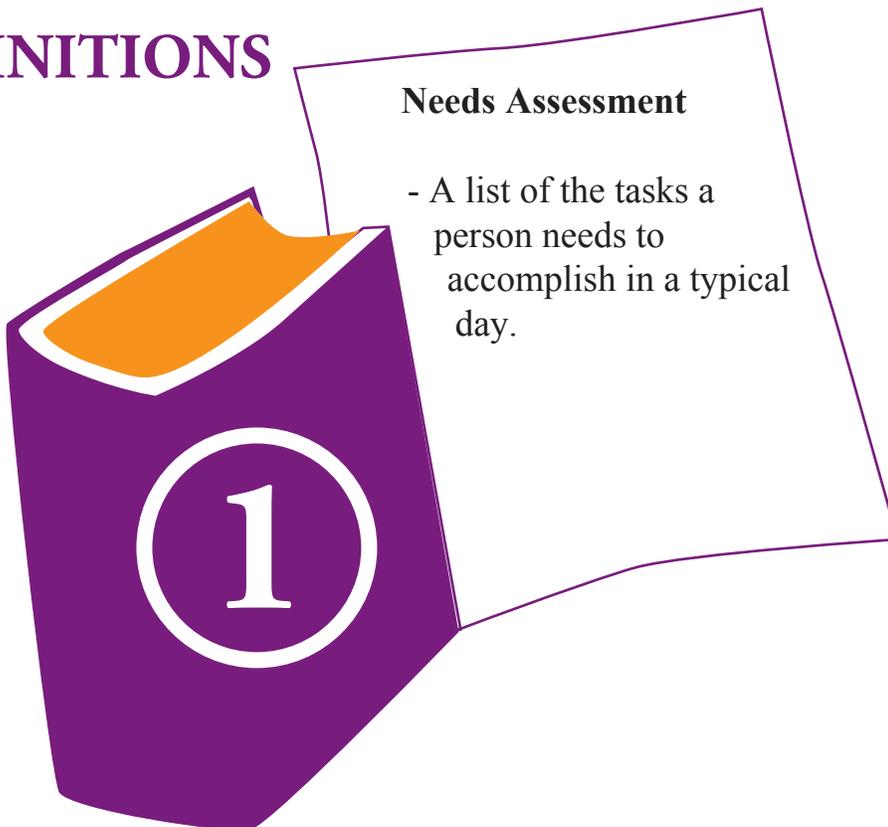
1. Why is it important to know what you need and want?

2. What are the different sections of a Needs Assessment?

3. Why is a Needs Assessment a helpful tool?

4. How can your needs change over time? What should you do when they change?

DEFINITIONS



Needs Assessment

- A list of the tasks a person needs to accomplish in a typical day.

TASK CHECKLIST

Knowing What You Need & Want

Adapted from the *Transition Guide through the Connecticut Nursing Facilities Transition Grant*

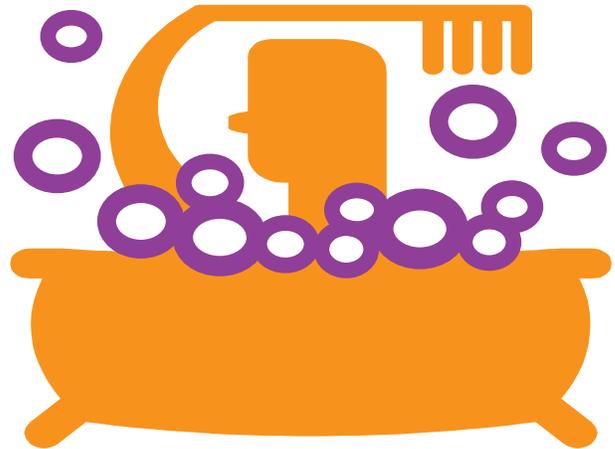
“Transition Guide: A booklet for individuals who want to leave a nursing facility and move to the community” was developed by the Connecticut Nursing Facility Transition Grant. Available on the Connecticut Department of Social Services Website <http://www.dss.state.ct.us/pubs/TransGuide.pdf> or call 1-800-261-3769 and ask for “My Community Choices.”

- 1 – Essential** **3 – Nice**
2 – Important **4 – When Time Is Available**

PERSONAL CARE TASKS

Task Area - Bathing

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Shower or Bath			
<input type="checkbox"/> Wash & Rinse Body			
<input type="checkbox"/> Wash Hair / Condition / Rinse			
<input type="checkbox"/> Dry body thoroughly			
<input type="checkbox"/> Apply lotion or powder			
<input type="checkbox"/> Apply deodorant			
<input type="checkbox"/> Shave			
<input type="checkbox"/> Check supplies (e.g. soap)			
<input type="checkbox"/> Thoroughly dry shower chair			
<input type="checkbox"/> Clean-up bathroom			
<input type="checkbox"/> Put away supplies, etc.			



Task Area - Personal Hygiene

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Comb / brush / style hair			
<input type="checkbox"/> Ear care			
<input type="checkbox"/> Nail care			
<input type="checkbox"/> Wash face / apply moisturizer			
<input type="checkbox"/> Apply make-up			
<input type="checkbox"/> Brush teeth			

Task Area - Dressing

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Dressing			
<input type="checkbox"/> Undressing			

Task Area - Transfers

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Balance when transferring			
<input type="checkbox"/> Pivot transfer			
<input type="checkbox"/> Total lift (Needs to lift ____ lbs.)			
<input type="checkbox"/> Sliding board			
<input type="checkbox"/> Hoyer Lift (Manual / Electric)			
<input type="checkbox"/> Ceiling Track Lift			
<input type="checkbox"/> Other			

Task Area - Toileting

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Use toilet / commode / urinal / bed pan			
<input type="checkbox"/> Cleaning			
<input type="checkbox"/> Menstrual Care			
<input type="checkbox"/> Drain leg bag			
<input type="checkbox"/> Hook up urinary drainage / ostomy equipment			
<input type="checkbox"/> Clean urinary drainage equipment			

Task Area - Bladder Care

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> In-dwelling catheter			
<input type="checkbox"/> Condom-drainage			
<input type="checkbox"/> Ilio conduit			
<input type="checkbox"/> Other			

Task Area - Bowel Care

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Digital Stimulation			
<input type="checkbox"/> Suppositories			
<input type="checkbox"/> Enema			
<input type="checkbox"/> Laxative			
<input type="checkbox"/> Colostomy			
<input type="checkbox"/> Clean up after			
<input type="checkbox"/> Other			

Task Area - Skin Care

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Prevent skin breakdown			
<input type="checkbox"/> Treat skin breakdown			
<input type="checkbox"/> Inform of any irritated skin areas to prevent sores			

Task Area - Medication

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Administer medication			
<input type="checkbox"/> Get prescriptions from the store			
<input type="checkbox"/> Give injections			

Task Area - Exercise

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Range of Motion			
<input type="checkbox"/> Strengthening			
<input type="checkbox"/> Circulation			
<input type="checkbox"/> Assist with accessing local fitness centers or hydro-therapy			
<input type="checkbox"/> Other			

Task Area - Positioning

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Position in bed			
<input type="checkbox"/> Night time turning assistance and repositioning			
<input type="checkbox"/> Position in chair / wheelchair			

Task Area - Respiration

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Set up ventilator			
<input type="checkbox"/> Set up bipap or other equipment to assist with breathing			
<input type="checkbox"/> Suctioning			
<input type="checkbox"/> Clear throat & lungs by assisted cough			

Task Area - Other Equipment & Medical Needs

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Set up environmental control / computer			
<input type="checkbox"/> Set up communication device			
<input type="checkbox"/> Monitor Health (i.e. blood pressure)			
<input type="checkbox"/> Other			

HOUSEHOLD & OTHER NEEDS

Task Area - Meal Preparation & Eating

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Prepare foods			
<input type="checkbox"/> Cook			
<input type="checkbox"/> Serve / cut food			
<input type="checkbox"/> Feed			
<input type="checkbox"/> Tube Feed			
<input type="checkbox"/> Put food away			
<input type="checkbox"/> Clean up (wash dishes / counters / appliances)			

Task Area - Household Support

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Clean refrigerator			
<input type="checkbox"/> Make / change bed			
<input type="checkbox"/> Sweep			
<input type="checkbox"/> Wash / mop floors			
<input type="checkbox"/> Vacuum			
<input type="checkbox"/> Dust			
<input type="checkbox"/> Clean toilet / commode seat and bucket			

Task Area - Household Support (continued)

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Scour tub / shower/ sink			
<input type="checkbox"/> Empty trash			
<input type="checkbox"/> General clean up			
<input type="checkbox"/> Wash mirrors / other glass			
<input type="checkbox"/> Wash doors / light switches / door handles			
<input type="checkbox"/> Wash walls			
<input type="checkbox"/> Wash blinds / curtains			
<input type="checkbox"/> Wash windows			
<input type="checkbox"/> Clean and Maintain wheelchair			
<input type="checkbox"/> Arrange for heavier work, home maintenance			
<input type="checkbox"/> Property maintenance (lawn care and snow removal)			
<input type="checkbox"/> Gardening (inside and outside plants / water)			
<input type="checkbox"/> Other household maintenance			

Task Area - Laundry

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Sort clothes			
<input type="checkbox"/> Hand wash items			
<input type="checkbox"/> Put clothes in wash			
<input type="checkbox"/> Put clothes in dryer			
<input type="checkbox"/> Iron			
<input type="checkbox"/> Mend Clothes			
<input type="checkbox"/> Bring Clothes to & from Dry Cleaners or Laundromat			
<input type="checkbox"/> Other			

Task Area - Shopping

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Assist with making list			
<input type="checkbox"/> Assist in store			
<input type="checkbox"/> Assist with money			
<input type="checkbox"/> Carry purchases home			
<input type="checkbox"/> Put away purchases			
<input type="checkbox"/> Help try on shoes /clothes			
<input type="checkbox"/> Other			

Task Area - Other Errands

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Assist at school / work			
<input type="checkbox"/> Assist at meetings			
<input type="checkbox"/> Medical Appointments			
<input type="checkbox"/> Counseling Appointments			
<input type="checkbox"/> Vocational / Case Management Appointments			
<input type="checkbox"/> Banking			
<input type="checkbox"/> Vehicle Maintenance			
<input type="checkbox"/> Clean Vehicle			
<input type="checkbox"/> Assist with social events			
<input type="checkbox"/> Assist with attending religious services			
<input type="checkbox"/> General errands / Other			

Task Area - Transportation

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Arrange transportation			
<input type="checkbox"/> Accessible vehicle driven by assistant			
<input type="checkbox"/> Assistant uses own vehicle			
<input type="checkbox"/> Assistant provides support on public transportation			
<input type="checkbox"/> Assistant provides support on accessible transportation (ADA, Dial-a-Ride)			
<input type="checkbox"/> Other			

Task Area - Essential Communication

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Writing			
<input type="checkbox"/> Telephone			
<input type="checkbox"/> Computer			
<input type="checkbox"/> Sign Language / Interpreting			
<input type="checkbox"/> Other			

Task Area - Organizing

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Clean desk			
<input type="checkbox"/> Organize paperwork			
<input type="checkbox"/> Filing			
<input type="checkbox"/> Organize clothes			
<input type="checkbox"/> Organize drawers			
<input type="checkbox"/> Organize closets			
<input type="checkbox"/> Other			

Task Area - Finances

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Prepare budgets			
<input type="checkbox"/> Pay bills			
<input type="checkbox"/> Make deposits			
<input type="checkbox"/> Make withdrawals			
<input type="checkbox"/> Prepare taxes			
<input type="checkbox"/> Prepare paperwork required for benefits			
<input type="checkbox"/> Assist with mail			
<input type="checkbox"/> Other			

Task Area - Pet Care

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Feed			
<input type="checkbox"/> Wash out bowls			
<input type="checkbox"/> Fill up bowls			
<input type="checkbox"/> Clean up after animal (dog) goes outside			
<input type="checkbox"/> Empty / Clean Litter Box			
<input type="checkbox"/> Organize supplies			
<input type="checkbox"/> Brush / Groom			
<input type="checkbox"/> Provide medication as needed			
<input type="checkbox"/> Let in / out of house			
<input type="checkbox"/> Schedule / Take to Vet Appointments			
<input type="checkbox"/> Other			

Task Area - Child Care

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Assist with care needs			
<input type="checkbox"/> Assist with household needs			
<input type="checkbox"/> Driving			
<input type="checkbox"/> Other			

Task Area - Managing Personal Assistants

Support Needed	Description / When	Time Needed	Priority Level
<input type="checkbox"/> Advertise for PA			
<input type="checkbox"/> Assist in Interviewing PA			
<input type="checkbox"/> Check references			
<input type="checkbox"/> Assist with hiring / paperwork for PA			
<input type="checkbox"/> Train PA			
<input type="checkbox"/> Scheduling			
<input type="checkbox"/> Arrange back-up as needed			
<input type="checkbox"/> Complete timesheets			
<input type="checkbox"/> Other			



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