

# **K A N S A S**

Personal Assistance Supports and Services (K-PASS)

## **SELF- DIRECTION TOOLKIT**

A Comprehensive Guide to Assist Individuals in Self-Direction

The Kansas University Center  
on Developmental Disabilities

UNIVERSITY OF KANSAS

April 2006



## **Acknowledgements**

THE KANSAS SELF-DIRECTION TOOLKIT provides individuals with disabilities the information and tools needed to self-direct any component of their personal assistance services.

Consumers, case managers, service coordinators, family members and others will like the Toolkit's step-by-step format with a mix and match option that puts you in control of the information you want and need to self-direct your personal assistant (PA) supports and services.

Whether you are a first-time employer or you've been hiring PAs for years and are just looking for some ideas to make the whole process easier, you'll like the user-friendly format.

It is an ambitious goal to develop information, all in one "toolkit", that enables self-directed employers to recruit, hire, train, and manage personal assistants (PA). The extent to which this goal has been accomplished is due to the diligence of the K-PASS Stakeholder Group and others who reviewed the Toolkit draft and offered their advice and expertise.

The Kansas Self-Direction Toolkit was modeled on the Tennessee Personal Assistance Supports and Services (PASS) User's Guide, developed under a Department of Health and Human Services grant by The Arc of Tennessee. Other resources are listed in the References and Resources section.

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Self-advocates, parents, families and professionals from across Kansas reviewed the draft of the Kansas Self-Direction Toolkit, offered their comments and suggestions. Their advice helped shape the Toolkit.

Sara Sack, Ph.D., Sheila Simmons, M.A., and Patricia Black Moore, M.S., the K-PASS Management Team, thank the advisors and contributors for their efforts. Our hope is that the K-PASS Self-Direction Toolkit supports the philosophy of self-direction in a meaningful way.

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# KANSAS Personal Assistance Supports and Services (K-PASS)

## Self-Direction Toolkit

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# **SECTION 1**

## **Introduction to Self-Direction**

- What is Self-Direction?
- What is a Personal Assistant?
- Kansas Models of Supports & Services
- The Benefits of Self-Direction
- Rights and Responsibilities of Self-Direction
- Resources To Get You Started
- Section 1 Checklist



## Introduction to Self-Direction

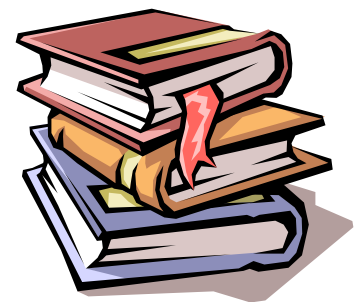
Welcome! The Kansas Personal Assistance Supports and Services (K-PASS) Self-Direction Toolkit offers a step-by-step look at self-direction. As a person with a disability you may be new to directing your personal assistance services or you may want to change the current system you have in place. Many have discovered that choosing to self-direct is the best way for them to make sure they get the individualized services they want.

The purpose of the Kansas Self-Direction Toolkit is to provide people with disabilities the information and tools they need to hire and manage their personal assistant supports and services.

This Toolkit was developed to take you through each step of the process from developing a job description, selecting a payroll agent, advertising for personal assistants (PAs), screening, interviewing, selecting and then training those people you hire, as well as managing, paying and even dismissing a personal assistant if necessary. The Toolkit includes tips on planning for emergency back-up PAs, definitions of abuse, neglect, and exploitation and other useful resources. There is a list of all of the topics, sections and appendices in the Table of Contents.

One way to use the Toolkit is to start with Section 1 - Introduction to Self-Direction, and work your way through each of the other sections one by one. Another way you can use this Toolkit is to pick the section or topic that most interests you and start there. The Toolkit was developed so that you can mix and match the sections in the way that best suits you.

Let's start by defining self-direction.



## **What is Self-Direction?**

Self-direction is a management tool that supports an individual with a disability to be in charge of and responsible for the personal assistance services they receive. A person with a disability can direct their personal assistant services themselves or they can select someone they trust to direct services on their behalf. The law permitting self-direction of personal assistance services was passed by the Kansas legislature in 1989. A copy of the legislation, specifically H.B. 2012 and Kansas statute, K.S.A. 39-7,100, is found in Appendix A.

### H.B. 2012

As a result, this legislation:

- Gave persons in Kansas who receive services through waiver programs the option to self-direct their personal assistance services, or to have someone direct services on their behalf.
- Established an exemption to the nurse practice act allowing the performance of “health maintenance activities,” by personal assistants.
- Defined assistant care services.

### K.S.A. 39-7,100

- Defined HCBS (Home and Community Based Services) services and gave individuals on the HCBS MRDD Waiver the right to make decisions about their personal assistance services, and direct and control these services.
- Individuals on the Waiver may choose to be in charge and be responsible for their personal care assistance services including, but not limited to:
  - selecting,
  - training,
  - managing,
  - paying, and
  - dismissing of a personal assistant.

## **What is a Personal Assistant?**

A Personal Assistant (PA) is someone who is hired to assist people with disabilities with activities they would do themselves if they did not have a disability. The PA's job duties are different depending on the needs of the person with a disability. The personal assistant's job is to assist his or her employer with daily living activities. This includes, but is not limited to, personal care, housekeeping, community access, health and safety.

In Kansas, personal assistance services can be provided by another person but home modifications or the purchase of assistive devices can also be used to increase independence. Looking at all of the resources available including natural supports, paid staff and assistive technology is important in designing the personal assistance supports and services that help you increase your independence and personal control.

## **Kansas Models of Supports & Services**

Kansas has three primary models of service delivery. They are:

- (1) self-directed services,
- (2) self-directed services with an agency or selected person providing supports and
- (3) agency-directed services.

Let's start with self-directed services. In this model, the person with a disability is the employer. As the employer, you:

- interview and select your payroll agent.
- interview and hire your PA.
- check employment and personal references.
- decide what your PA does and when they do it.
- provide the training your PA needs to be successful.
- make a back-up plan so that you have the supports and services you need when your PA is sick or quits unexpectedly.

Some people with disabilities prefer a different model of supports and services. You can choose to self-direct with supports. In this model, you are the employer and you share responsibilities for the direction of your services with others, either an advocate or an agency. You or your advocate (a trusted person who acts on your behalf) directs some

components of your PA services and the agency has the responsibility to direct the other components.

The third model describes agency-directed services. In this model, the agency is the employer and has the responsibility to provide the supports and services needed including conducting background checks. In Kansas, these agencies are called community developmental disability organizations (CDDOs), community service providers (CSPs) and centers for independent living (CILs).

Self-determination is similar to self-direction but not the same

Thinking about self-direction and how it will work in your life might make you wonder if it is the same as self-determination. Since 1996, Kansas has had a limited enrollment program on self-determination. Self-determination is similar to self-direction but not the same. Persons in the self-determination program have more choice and control on how to use their personal budgets. Persons who are enrolled in the self-determination program are allowed to save funds, have more flexibility in determining the rate of pay for personal assistant services and pay for some non-traditional services.

Self-direction and self-determination both support people to:

- select, hire and manage their personal assistants
- choose services and supports to meet their needs
- budget and spend funds to meet their needs

The table on the next page shows the three models of self-direction in more detail.



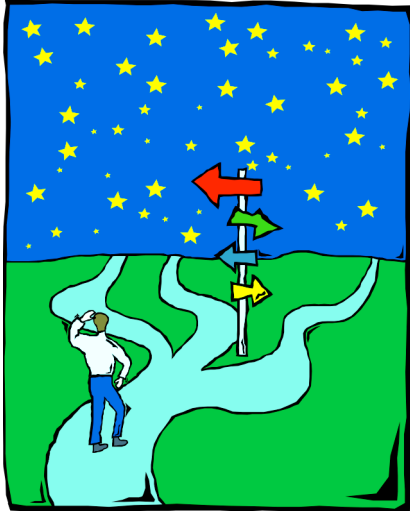
## Kansas Models of Self-Direction: Supports and Services

| <b>Self-Direction</b>  | <b>Self-Direction with Supports</b>   | <b>Agency-Directed Service Provider</b>                              |
|--|---|--|
| Person with a disability is the employer.  | Person with a disability is the employer.   | Agency is the employer.  |
| Person with a disability makes all decisions, including but not limited to, hiring, training and scheduling PAs. | Person with a disability shares responsibilities with others, advocate or agency. Person with a disability or the person acting on their behalf directs some components of PA services. | Agency hires, trains and schedules PAs.                              |
| Person with a disability interviews and selects a payroll agent.   | Person with a disability and their advocate interview and select a payroll agent.   | Agency pays for services. Agency is the payroll agent.               |
| Person with a disability is responsible for his or her own back-up PAs.  | Person with a disability and their advocate or agency are responsible for their back-up PAs. Individual may contract with agency for back-up services.                                  | Agency is responsible for providing services and back-up PAs.        |
| Person with a disability is responsible for checking personal and employment references.                         | Person with a disability and their advocate or agency are responsible for checking references. Individual may contract with agency for this service.                                    | Agency is responsible for checking references and background checks. |

Deciding between hiring someone from an agency, hiring an individual on your own or something in between is an important personal choice. You can make this decision for yourself or with the help of someone you choose. Peer support is encouraged. Talking with others who use personal assistant services can be very helpful, especially if you have questions or feel anxious about working with personal assistants for the

first time. As you learn more about self-directing your PA supports and services, you'll be more comfortable deciding how much you want to take on to start. You'll be able to make an informed decision based on what you want to do. In some cases, it may be possible to find a PA yourself and then have that person hired by an agency.

## The Benefits of Self-Direction



When you decide to self-direct your personal assistants you take control of your life decisions and resources. As an employer you have the opportunity to make decisions other employers face including one or more of the following:

- Select and hire PAs
- Train PAs
- Set PA's schedule
- Manage, evaluate and provide feedback to PAs
- Pay the PAs selected through a payroll agent
- Fire a PA, if necessary

People in control of these life decisions report benefits including: increased satisfaction with their living and working situations and a higher quality of life.

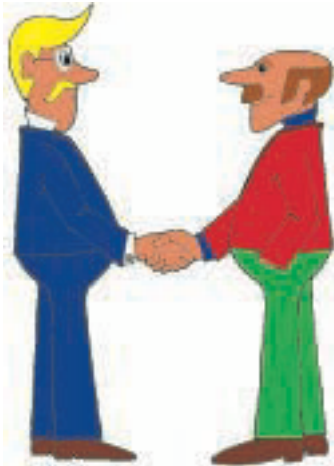
Whether you work with individual personal assistants, an agency or even a volunteer, you'll want to be prepared to act on the choices you make. Learn which community organizations can advocate on your behalf if you need help. To assist you, we have included a list of Kansas organizations, agencies and services to get you started (See Appendix B).

Understanding your rights and responsibilities will help you to be an effective advocate for yourself. Let's start by talking about some of your rights when you self-direct.

## Rights and Responsibilities of Self-Direction

As the employer of personal assistants, you have certain rights and responsibilities to yourself and to your PAs. As a person who is self-directing you have the right to:

- Decide who your PA will be
- Direct your personal care
- Decide when your PA will work for you
- Make choices about how much help you want from your provider agency, if you use one
- Be treated with dignity and respect, which includes respect of your privacy and confidentiality
- Replace PAs who don't respect your rights



Experienced employers offer this advice: being a responsible employer makes it easier to keep good PAs. As you understand your responsibilities as an employer, you'll be better able to decide when you are willing or not willing to compromise on your PA services. Persons self-directing have the following responsibilities:

- Be honest and detailed when explaining your needs
- Provide adequate training
- Do not ask your PAs to do tasks that were not agreed upon
- Give positive and constructive feedback
- Be respectful when talking to your PAs
- Make sure your PAs get paid on time
- Develop a workable emergency/back-up plan

You'll more clearly understand how your rights and responsibilities fit into the bigger picture of being an employer as you work your way through the information in the Toolkit.

## Resources To Get You Started

Many people with disabilities who self-direct their services say: “Just get started! You can take on more responsibilities later.” This is great advice coming from people who are “walking the walk and talking the talk” of self-direction. Advocates from across Kansas have offered their expertise and their hard work to make the Kansas Self-Direction Toolkit available to support your efforts. Along with the Toolkit, people who self-direct their services and case managers and independent living skills trainers knowledgeable about self-direction, are available to share their expertise.

### Section 1 Checklist

| Section 1 – Introduction to Self-Direction Checklist |  |
|--|--|
| Check here   |  |
|  | I understand the term: self-direction.   |
|  | I know the definition of PA.   |
|  | I read about the Kansas Models of Self-Direction: Supports and Services.             |
|  | I understand the benefits of self-direction.   |
|  | I read the rights and responsibilities lists.  |
|  | I know enough about self-direction to know if it’s something I want to do right now. |





# SECTION 2

## Developing Your Job Description

- Step 1 – Identify tasks that must happen
- Step 2 – Identify tasks that need to happen but are flexible
- Step 3 – Compare list of tasks with person-centered plan
- Step 4 – Identify skills and qualities for employees carrying out these tasks
- Step 5 – Write your job description
- Section 2 Checklist





## **Developing Your Job Description**

Congratulations! Having recognized the benefits of self-directing your personal assistance supports and services, you are ready to hire a personal assistant (PA). In this section, we will walk you through developing your job description, step by step.

- Step 1. Identify the tasks that must happen.
- Step 2. Identify tasks that you need to have happen but are flexible about when they happen.
- Step 3. Match what you want done to what you can pay for through your plan of care (person-centered plan).
- Step 4. Identify the skills and qualities for employees carrying out these tasks.
- Step 5. Write your job description with the information you have collected.

Doing these 5 steps now will save you time and effort later. Let's start.

## ❑ Step 1 - Identify the tasks that must happen.

The first step in creating a job description is to identify the tasks that must happen. Formal self-assessment can help you decide what your needs are. These needs will become the tasks that your PA will do.

A self-assessment tool, the Job Description Development Tool (Appendix C), is included in this Toolkit. The self-assessment tool is formatted to help you consider a wide variety of tasks and activities. Use this tool to identify tasks important to you and consider how a PA can assist you.

Also, remember that natural supports such as neighbors, friends and family can be used as a part of your daily routine.

- Natural supports can be people in your life who are able to provide services and do not have to be paid.
- Natural supports are often simply the neighborly things we naturally do.

For example, if you need someone to take your trash to the curb, your neighbor may take yours as she walks by because it's convenient. You may be able to help your neighbor by walking her dog when you go out for a walk.



Another area to assess is your current use of assistive technology and assistive technology devices or equipment that might help you do some tasks more independently. For example, you may want to use a rocker knife, adaptive pan handle or other assistive device or utensil so you can prepare food rather than having someone else cook. You might decide to use a "reacher" to get items by yourself or a shower chair so you need less help showering.

Take this opportunity to look at the "big picture." You'll have to make some choices about services you want and those you need but you can do that later. Now is the time to think about what you need and what you want. Once you have completed the self-assessment process, whether by using

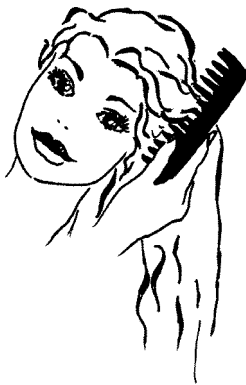
the Job Description Development Tool or in another way, you are ready to make a list of the tasks that your PA must do.

To help you with your planning, you can use the Job Description Planning Worksheets at the end of Step 1. These worksheets have room to record your decisions for Steps 1, 2 and 3.

Let's think about Step 1 now. As you know, Step 1 is about identifying the tasks that you have decided must happen. All people have similar needs that can be divided into four areas:

- personal care,
- domestic/household,
- health & safety and
- community.

### Personal Care



People have tasks in the area of personal care, for example, taking a bath or a shower, getting dressed, brushing their teeth, shaving, transferring and keeping a sleep schedule. Can you think of any other personal care tasks that you need to list? Some people need some help to get these tasks done; that help can come from a PA, a friend or family member (often called natural supports) or an assistive technology device.

Using the first worksheet, Job Description Planning Worksheet – Personal Care, write in the task, the day and time the task must be done and put a check mark in the column titled “Step 1” if it is a required task. We’ll think about the other steps later.

### Domestic/Household

Some people have needs in the area of domestic and household chores or work. Are you hiring your PA to go grocery shopping with you? Or, are you hiring your PA to do your grocery shopping for you? Or, maybe grocery shopping is something you always do with your aunt and is not an area that you plan to hire a PA to do. You still want to



list the task of “grocery shopping.” You can think about who does each of your tasks in Step 4. Other kinds of tasks to consider include: meal preparation, eating, laundry, cleaning/ housekeeping and pet care. Are there other tasks you need to list? Use the second worksheet, Job Description Planning Worksheet – Domestic/Household.

### Health & Safety

The third area to consider is health and safety. In this area, many people list tasks like taking medication, getting to PT (physical therapy) or OT (occupational therapy) appointments, home maintenance help and communication skills. Do you have other tasks on your list for health & safety? You can list them now on the third worksheet titled “Health & Safety.”



### Community



The fourth area is community. Think about the kinds of activities that you do away from home. What tasks do you want your PA to do? Do you need assistance with writing a check, transportation to the bank or help paying for tickets at the movies? What other tasks? Have you thought about leisure activities you like? Maybe attending church, synagogue or mosque services, or getting to and from work? If you still have tasks on your list that don't fit these areas, make your own area and list your tasks on the worksheet, “Community.”

# Job Description Planning Worksheets for 4 Life Areas

| Job Description Planning Worksheet – PERSONAL CARE                                |          |      |          |           |        |            |                |
|---|----------|------|----------|-----------|--------|------------|----------------|
| Personal Care   | Day/Time | Task | Step 1   | Step 2    | Step 3 |            |                |
|   |          |      | Required | Preferred | Paid   | On My Plan | # Hrs for Task |
| Example Tasks:  |          |      |          |           |        |            |                |
| Taking a bath   |          |      |          |           |        |            |                |
| Brushing teeth with electric toothbrush   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
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|   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
| <b>Reminder:</b><br>Think about natural supports and assistive technology options |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |
|   |          |      |          |           |        |            |                |



## Job Description Planning Worksheet – HEALTH & SAFETY

| Health & Safety  |              |      | Step 1   | Step 2    | Step 3 |               |                   |
|--|--------------|------|----------|-----------|--------|---------------|-------------------|
|  | Day/<br>Time | Task | Required | Preferred | Paid   | On My<br>Plan | # Hrs for<br>Task |
| Example<br>Tasks:  |              |      |          |           |        |               |                   |
| Reminder to<br>take medicine   |              |      |          |           |        |               |                   |
| Assist with<br>mowing the<br>grass   |              |      |          |           |        |               |                   |
|  |              |      |          |           |        |               |                   |
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|  |              |      |          |           |        |               |                   |
| <b>Reminder:</b><br>Think about<br>natural<br>supports and<br>assistive<br>technology<br>options |              |      |          |           |        |               |                   |
|  |              |      |          |           |        |               |                   |
|  |              |      |          |           |        |               |                   |
|  |              |      |          |           |        |               |                   |

## Job Description Planning Worksheet - COMMUNITY

| Community   |              |      |                    |                     |        |               |                   |
|---|--------------|------|--------------------|---------------------|--------|---------------|-------------------|
|   | Day/<br>Time | Task | Step 1<br>Required | Step 2<br>Preferred | Step 3 |               |                   |
| Examples:   |              |      |                    |                     | Paid   | On My<br>Plan | # Hrs for<br>Task |
| Drive me to work  |              |      |                    |                     |        |               |                   |
| Provide support for me at meetings  |              |      |                    |                     |        |               |                   |
|   |              |      |                    |                     |        |               |                   |
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|   |              |      |                    |                     |        |               |                   |
| <b>Reminder:</b><br>Think about natural supports and assistive technology options |              |      |                    |                     |        |               |                   |
|   |              |      |                    |                     |        |               |                   |
|   |              |      |                    |                     |        |               |                   |
|   |              |      |                    |                     |        |               |                   |



**❑ Step 2 - Identify tasks that you need to have happen but are flexible about when they happen.**

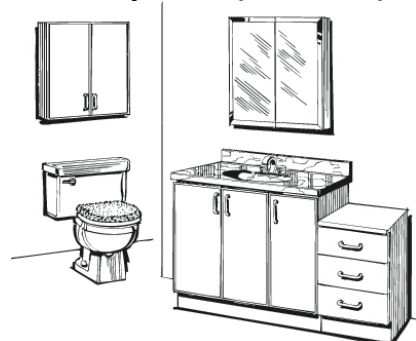
Next, you'll identify the tasks that you need to have happen but you are flexible about when they happen. This is the time to also identify tasks that you would like to have happen but maybe haven't been able to accomplish up to this point. These tasks together with the tasks you identified in Step 1 will become the basis for your job description.

Read through the tasks listed in the examples below regarding personal care, domestic and household activities, health and safety issues and community access. You'll notice that these are the kinds of activities and routines you considered when you did your self-assessment. Think about each job task. Is this a task that can be accomplished through natural supports, assistive technology or a personal assistant?

### Example Tasks for Job Description

#### Personal Care

PA may complete aspects of personal care in regards to bathing, shaving, dressing, toileting, oral hygiene, transferring and sleep schedule as directed by employer. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

An illustration of a bathroom. On the left is a toilet. In the center is a vanity with a sink and a mirror above it. To the right of the vanity is a small cabinet with three drawers. Above the shower area is a window with a curtain.

For example:

- Assist me with bathing, dressing and hair care
- Assist me with transfer from my wheelchair to the toilet
- Fix my hair and do my makeup if I request
- Help me transfer between wheelchair and bed
- Assist with personal hygiene, including washing hair and shaving

## Domestic/Household



PA will assist with any necessary domestic or household tasks that might include: shopping, meal preparation, eating, laundry and cleaning/housekeeping. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Ask me what I want for breakfast
- Prepare my breakfast
- Thaw frozen meat if necessary
- Vacuum the carpets
- Do laundry
- Dust furniture
- Clean bathroom well once a week, and a quick clean-up (toilet, tub and sink) each day

## Health & Safety

PA may assist with tasks regarding employer's health and safety possibly including medication administration, stretching therapy needs and home maintenance.

PA will also follow the communication guidelines established in the interview and training process.

Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Assist with daily range of motion or stretching therapy
- Remind me to take my medications
- Wash breathing equipment

## Community

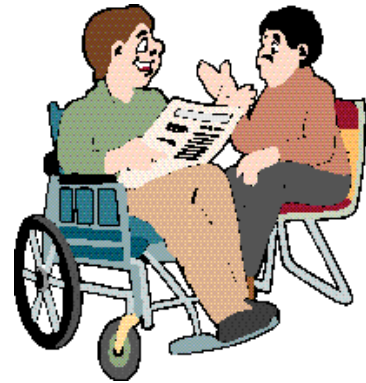
PA may assist with activities in the community including: banking, participation in groups, community access, participation in religious activities, job activities and transportation. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Provide support when I'm at a meeting
- Drive to work, errands and recreation

## Other

PA is expected to follow the rules set by employer in regards to smoking, the use of drugs and alcohol, sex, guests, overnight guests and what is expected of PA while employer is resting or asleep.



For example:

- My home is smoke-free. Smokers may smoke outside, but not in my home or in my car.

Use the Job Description Planning Worksheets you started in Step 1 to continue planning. List the additional tasks you identified in Step 2.

This is a good time to think about what day and what time of the day you want each of the tasks accomplished. Many of the tasks you want your PA to do need to be described in some detail so that your new PA will know what you want done, how it should be done, and when to do it. Be as clear about what you want as you can be.

**□ Step 3 - Match what you want done to what you can pay for through your person-centered plan (plan of care).**

Your plan of care is the document or person-centered plan you developed with your case manager and other friends. In Step 3 you will compare your list of tasks to the services you are able to pay for through your person-centered plan or plan of care. This is an important step. You must determine if the tasks you want your PA to do are tasks that you can pay for with personal assistance funds. This is also the right time to find out how many hours you have for your PA.

When you know how many hours of PA services you have and the tasks that you can pay a PA to do, you may not have covered everything you want done. This is a good time to consider natural supports. Natural supports, having friends or family assist you without charge, can be an important part of the relationships you have developed. Be sure not to overlook them.

There is a section of the Job Description Planning Worksheets you worked on in Steps 1 and 2 that you can use for Step 3.



Step 3 has three parts: “Paid,” “On My Plan” and “#Hrs for Task.” Using your worksheet, look at each of your tasks. Make a checkmark in the “Paid” column for each of the tasks that you intend to use PA services to do. Put a checkmark in the “On My Plan” column if your personal assistance funds will pay to have a PA do the task. And finally, guess how long it will take your PA to do each task and put that amount of time in the “# Hrs (Number of Hours) for Task” column.

When you’ve finished going through your list, add up the amount of time you think it will take your PA to do the tasks that meet your funding requirements. Does the number of hours that you want match the amount of time you have for your PA job? If it does, hurrah! Move on to Step 4.

If not, look at your list of tasks again. Think how you can use additional natural supports or assistive technology to accomplish your goals.

#### **□ Step 4 - Identify the skills and qualities for employees carrying out these tasks.**

In Steps 1 and 2 you identified both the required and preferred tasks you want your personal assistant (PA) to do. In Step 3 you matched your list of tasks with your person-centered plan and determined the amount of time you have available for PA services.

In Step 4 you'll think about the skills and qualities your PA should have and the type of person you need. You're looking for a competent person that you like. A competent person has the skills he or she needs to do the tasks you identified in Steps 1 and 2 or can learn to do the tasks.

#### Competencies = Qualities and Skills

Competencies are the qualities or skills you want your PA to have. Different qualities are important to different people. What qualities and skills are important to you? You decide what is most important to you based on your personality, the tasks you need to have done and how often you are going to have contact with your PA. You may want to include a list of competencies in your job description so your PA will know exactly what qualities you expect them to have.

A sample list of competencies is included in Appendix D. You'll notice that each competency is defined. These definitions explain what actions a person would do to fulfill the performance expectation of the competency. For example, find the competency "discrete." If you want to hire a PA who is "discrete," you would look for someone who knows how to protect your privacy. This person would not share private information about your life, needs and care with anyone else.

As you use this list to help you identify the competencies that are meaningful to you, note your decisions on the worksheets on the following pages.

Notice that there are three parts to this set of worksheets, A, B and C.



The first page, **Worksheet A** is a list of the competencies and definitions you found in Appendix C, Sample Job Competencies. On Worksheet A, put a checkmark beside each competency as you decide whether it is:

- Very Important,
- Somewhat Important or
- Does Not Matter.

Use the blank spaces for other competencies you want your PA to have.

The second page or **Worksheet B** asks you to think about the kind of qualities, skills and talents you want your PA to have.

- Is the right PA for you a quiet person or a talkative person? Does it matter to you?
- Are you looking for someone who likes to go to the late, late show at the movie theater?
- Do you want someone to go skateboarding with you?

Think about what other qualities you want your PA to have and add them to the worksheet. Then checkmark each of your choices:

- Very Important,
- Somewhat Important or
- Does Not Matter.

The third page, **Worksheet C** includes some questions to think about with space to add your own.

## Finding the Right PA – Personal Preferences Worksheet - A

| <b>A</b>                                  | Competencies                   | Very Important | Somewhat Important | Does Not Matter |
|---|--------------------------------|----------------|--------------------|-----------------|
| About the Right Personal Assistant for Me | Work commitment                |                |                    |                 |
|   | Building relationships         |                |                    |                 |
|   | Communication skills           |                |                    |                 |
|   | Teachable (willing to learn)   |                |                    |                 |
|   | Action oriented                |                |                    |                 |
|   | Problem solving                |                |                    |                 |
|   | Physical strength/coordination |                |                    |                 |
|   | Housekeeping                   |                |                    |                 |
|   | Personal appearance            |                |                    |                 |
|   | Time management                |                |                    |                 |
|   | Punctual                       |                |                    |                 |
|   | Scheduling/reporting           |                |                    |                 |
|   | Record keeping                 |                |                    |                 |
|   | Discrete                       |                |                    |                 |
|   | Compassionate                  |                |                    |                 |
|   | Respectful                     |                |                    |                 |
|   |                                |                |                    |                 |
|   |                                |                |                    |                 |
|   |                                |                |                    |                 |
|   |                                |                |                    |                 |

## Finding the Right PA – Personal Preferences Worksheet - B

| <b>B</b>  | Other Qualities/<br>Skills/ Talents | Very<br>Important | Somewhat<br>Important | Does Not<br>Matter |
|---|-------------------------------------|-------------------|-----------------------|--------------------|
| About the<br>Right<br>Personal<br>Assistant<br>for Me | Male                                |                   |                       |                    |
|   | Female                              |                   |                       |                    |
|   | Younger                             |                   |                       |                    |
|   | Older                               |                   |                       |                    |
|   | Night person                        |                   |                       |                    |
|   | Morning person                      |                   |                       |                    |
|   | Social                              |                   |                       |                    |
|   | Talkative                           |                   |                       |                    |
|   | Quiet                               |                   |                       |                    |
|   | Sense of humor                      |                   |                       |                    |
|   | Likes my pet                        |                   |                       |                    |
|   |                                     |                   |                       |                    |
|   |                                     |                   |                       |                    |
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|   |                                     |                   |                       |                    |



## Finding the Right PA – Personal Preferences Worksheet - C

|   |  |
|---|--|
| <b>C</b>                                  | Other Questions to Think About   |
| About the Right Personal Assistant for Me | <p>There are other things to think about as you begin your search to find a PA who matches the qualities and skills you want. Think about questions like these:</p> <ul style="list-style-type: none"><li>• Would I hire someone who smokes cigarettes?</li><br/><li>• What do I think about my PA consuming alcohol in my home?</li><br/><li>• What will I do if my PA wants to bring friends or family to my home during work time?</li><br/><li>• Will my PA eat with me? Will PA eat my food?</li></ul> <p>What other questions can you think of that would help you predict whether your new PA is a good match to the job you have to offer?</p> <ul style="list-style-type: none"><li>•</li><br/><li>•</li><br/><li>•</li><br/><li>•</li><br/><li>•</li></ul> |

## How many PAs do you need?

By now, you've determined how many hours of PA services you have and you've thought about the competencies, skills and qualities you want your new PA to have.

A couple of points to think about as you develop your PA's work schedule:

- Total hours of need = routine, predictable needs + 25% allowance for occasional or unexpected events. Be sure to leave a little "cushion" of time to cover those extra or unexpected things that happen.
- Consider hiring more than one PA. Many people say that hiring more than one personal assistant provides for increased security and flexibility. By hiring more than one PA you have a "pool" of PAs to draw from during holidays or when a PA needs time off. For more information about planning for "back-up," see Section 9 – PA Back-Up Plan.

For example: 30 hours / week can be divided by 2 PAs, making two 15-hour, part-time jobs or 4 PAs with 7-8 hours each.

## Wrapping up Step 4



Everyone's needs are different. Taking the time now to identify the qualities and skills that are important to you will help you make a successful match of person and job. Additionally, this is information that you can use when you begin training your new PA based on the skills you selected for your PA to succeed. For more information on Training, see Section 7 – Training Your PA.

**□ Step 5 - Write your job description with the information you have collected.**

You have the information you need to create a job description. You know what tasks you want your PA to do, how many hours you have to schedule, and the skills and qualities your PA needs to accomplish the tasks.

Take a look at the Sample Job Description on the next page. Notice at the end, there is a place for both your PA and you as the employer to sign. This is necessary to protect you and your PA. With a signed agreement in place, there can be no confusion about job expectations. The employer cannot expect the PA to do tasks not agreed to in the job description and the PA cannot disregard responsibilities listed in the job description.

In order for the job description to be effective as an agreement between you and your PA, it is vital that:

1. You are specific when writing the job description.
2. You and your PA completely read and sign the Agreement.
3. Both of you keep a signed copy for your own records.
4. Both you and your PA know your roles and responsibilities.

Following the Sample Job Description is the Personal Assistant (PA) Job Description Worksheet. You can use this worksheet to write in your own information and create a job description for your PA.

## Sample Job Description

**Job title:** Personal Assistant (PA)

**Supervised by:** Jane Doe (a woman who is self-directing her personal assistance supports and services)

**Job summary:** To assist a woman with a disability throughout her daily and evening activities and routines.

**Work schedule:** M-F, 7 pm – 11 pm

Note: The Personal Assistant must only work the hours that are listed above. Any additional hours will not be paid. Changes in scheduled hours may be negotiable between the PA and the employer.

**Wages:** Wages for this position are \$8.50 per hour.

**Total hours weekly:** 20

**Benefits:** (You can get this information from the Payroll Agent. Benefits may include worker's compensation benefits and insurance benefits among others.)

**Qualifications:**

Prefer a person with a sense of humor, "night" person, punctual, discrete, female, non-smoker. Must be a licensed driver with reliable transportation.

**Duties and responsibilities:**

Assist with bathing, dressing, transferring  
Assist with meal preparation, serving meal  
Assist with physical therapy exercises  
Assist with home maintenance (for example, hanging pictures on the wall)  
Accompany me to movies, ball games, horse shows

**Working conditions:** The employee will work in the employer's home, but may need to do other tasks in different settings (for example, social settings, stores or appointments).

**Reliability:** The employee is expected to use time wisely so the services are done in the allotted time. If the employee cannot make the agreed upon time, a call with notice is expected.

**End of services:** The employee agrees to give at least a two-week notice prior to resigning from this position.

---

**THIS JOB DESCRIPTION IS SUBJECT TO REVIEW OR REVISION ON AN ANNUAL BASIS OR WHEN A CHANGE IN JOB DUTIES IS REQUIRED.**

---

I have received a copy of the job description for my records.

I have read the entire job description and understand my responsibilities.

I understand that this constitutes an agreement between the employer and myself, and does not guarantee employment.

---

Signature of PA

Date

---

Signature of Employer

Date

## Personal Assistant (PA) Job Description Worksheet

**Job title:** Personal Assistant (PA)

**Supervised by:** \_\_\_\_\_

**Job summary:**

**Work schedule:**

Note: The Personal Assistant must only work the hours that are listed above. Any additional hours will not be paid. Changes in scheduled hours may be negotiable between the PA and the employer.

**Wages:** Wages for this position are \$ \_\_\_\_\_ per hour.

**Total hours weekly:** \_\_\_\_\_

**Benefits:**

**Qualifications:**

**Duties and responsibilities:**

**Working conditions:** The employee will work in the employer’s home, but may need to do other tasks in different settings (e.g., social settings, stores or appointments).

**Reliability:** If the employee is going to be late or absent, a phone call is expected with notice. The employee is expected to use time wisely so the services are done in the allotted time. If the employee cannot make the agreed upon time, a call with notice is expected.

**End of services:** The employee agrees to give at least a two-week notice prior to resigning from this position.

---

**THIS JOB DESCRIPTION IS SUBJECT TO REVIEW OR REVISION ON AN ANNUAL BASIS OR WHEN A CHANGE IN JOB DUTIES IS REQUIRED.**

---

I have received a copy of the job description for my records.

I have read the entire job description and understand my responsibilities.

I understand that this constitutes an agreement between the employer and myself, and does not guarantee employment.

---

Signature of PA

Date

---

Signature of Employer

Date

## Section 2 Checklist

|                 |  |
|-----------------|--|
| Check when done | Section 2 – Developing Your Job Description Checklist              |
|                 |  |
|                 | I understand how to identify the tasks my PA will do.              |
|                 | I thought about how assistive technology could be used.            |
|                 | I thought about where I can use natural supports.                  |
|                 | I understand that I can hire more than one PA if necessary.        |
|                 | I read how to identify the qualities and skills my PA should have. |
|                 | I have enough information to write my job description.             |







# SECTION 3

## Selecting a Payroll Agent

- The Purpose of a Payroll Agent
- Rights and Responsibilities of Payroll Agents
- Timesheets and Other Forms
- Ask About Administrative Costs
- Sample Questions to Ask a Payroll Agent
- Locating a Payroll Agent
- What You Need to Report
- Section 3 Checklist



## **Selecting a Payroll Agent**

As a person self-directing your personal assistance supports and services, you hire both personal assistants (PAs) and a payroll agent. It is important that you interview a payroll agent so that you understand what you will do and what the payroll agent will do. It's important to shop around because there may be differences in what payroll agents do and how much they charge for their services.

### **The Purpose of a Payroll Agent**

The main role of the payroll agent is to handle all payroll, tax, benefit, liability and worker compensation issues. Payroll agents also conduct criminal background checks of PAs although you may choose to do the employment and personal reference checks yourself. Though the payroll agent handles some or all of these duties, you still recruit, hire, train and manage your PAs.

To do your part, you'll need to know how many hours of PA services you can receive. Your payroll agent will have a copy of your plan of care and can discuss with you the tasks your PA can and cannot be paid to do. Having a payroll agent means that you do not have to worry about writing payroll checks and paying taxes or handling any financial responsibilities.

### **Rights and Responsibilities of Payroll Agents**

Payroll Agents have the Right to:

- Receive all necessary paperwork and information from you regarding your services
- Request and receive all timesheets and appropriate documentation of hours worked by your PAs in order to provide payment

Payroll Agents' Responsibilities include:

- Treat you with respect
- Work with you on meeting your scheduling needs
- Handle all payroll, benefits and tax issues

Remember, self-directing your PA supports and services requires that you hire a payroll agent, however you have the right to take on the responsibilities for selecting, training and managing your PAs. For more information about the law, look in Appendix A for H.B. 2012 and K.S.A. 39-7,100.

## **Timesheets & Other Forms**

Your payroll agent will have timesheets and other forms for you to use. You will need to turn these forms in to the payroll agent in order for your PAs to be paid on time.



### **Ask About the Administrative Costs**

Payroll agents charge for their services. The fee varies so you may want to talk to several payroll agents before you select one. You will want to ask about their fees so you can make an informed decision.

## **Sample Questions to Ask a Payroll Agent**

Some questions you might ask are:

- How much do you pay PAs?
- Is there a range of pay for PAs?
- What is your administration fee to provide payroll checks and background checks?
- Do you provide other services besides payroll and background checks?
- Is there a fee for these services?
- Do you teach me how to fill out your paperwork?
- Will you assist me in filling out paperwork?

- Do you have a PA job application I have to use?
- Do you advertise as a payroll agent or pay for advertising for each individual? As my payroll agent, do you advertise for PAs or pay me back for advertising costs?
- How many PAs can I employ?
- Can I employ a back-up PA?
- What happens if my PA quits and I need assistance locating another PA?
- How do I communicate with you?
- How do you communicate with the PAs I employ?
- How do you let me know about changes?

### **Locating a Payroll Agent**

Contact your local community developmental disability organization (CDDO) for a list of payroll agents that work with them. You can also choose to use payroll agents that work with CDDOs in other parts of the state. You can find a list of Kansas CDDOs on the Internet at <http://www.srskansas.org/hcp/css/CDDO.htm>.

### **What You Need to Report**



Remember to communicate with your payroll agent when you have a PA quit or leave or in the event that a PA is injured while completing job duties.

It's your responsibility to report turnover by calling your payroll agent.

- Call your payroll agent if one of your PAs quits or gives you notice that they are quitting.
- Call your payroll agent if you have fired a PA or given notice to terminate employment.
- Call your payroll agent if a PA is injured while completing job duties.

### Section 3 Checklist

| Section 3 – Selecting a Payroll Agent Checklist |   |
|---|---|
| Check here                                      |   |
|   | I understand that a payroll agent handles everything that involves payroll for my PA.           |
|   | I know I need to use timesheets and other forms I will get from my payroll agent.               |
|   | I understand that payroll agents charge for their services and that I can ask about their fees. |
|   | I read the list of sample questions.  |
|   | I understand how to locate a payroll agent.   |
|   | I understand that I need to call my payroll agent when certain things happen.                   |
|   | I have enough information to select a payroll agent.  |







# SECTION 4

## Recruiting Your PA

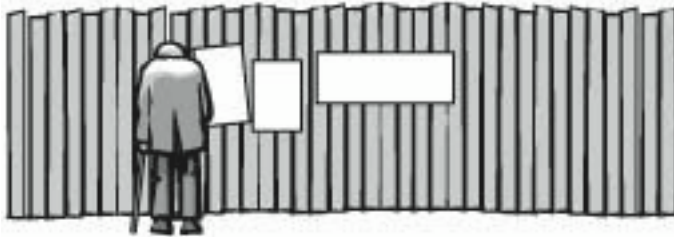
- Advertising – Where & How
- Sample Ads and Worksheet
- Using a Job Application – The Why
- Sample Job Application
- Section 4 Checklist



## Recruiting Your PA

In this section, Recruiting Your PA, we'll look at where to advertise. Next, we'll look at how to place an ad in a newspaper along with some tips on writing an ad that can help you find interested applicants who are right for your job. Finally, we'll consider why having your job applicants fill out an application for employment can benefit you. These steps will help you recruit a PA who is a good match for you and your job tasks.

### Advertising – Where & How



#### Advertising in Your Own Community

When you are thinking about where and how to advertise for your PA, consider the community you live in. You may be able to create an advertisement on a sheet of paper or a large index card and have luck placing it at your local:

- employment office
- grocery store
- Laundromat
- church
- community colleges/universities
- job service center
- career services department
- certain college classes related to disability issues  
(See list of Kansas community colleges, colleges and universities in Appendix E.)
- social service agencies
- community newspaper
- free weekly advertising guide
- local Center for Independent Living

Call these places first, find out who to talk to and ask about their policies or rules for putting up your flyer or submitting your ad.

## Get the Word Out



Telling family, friends and even people you meet that you're looking for a personal assistant can be a great way to find a PA. Get the word out to your case manager and others who employ PAs as well, that you are advertising for a personal assistant.

Word-of-mouth through friends and/or the person who is leaving can be an effective way to find your next PA. People who know you and the person they recommend can increase your chances of finding a reliable candidate for the job.

## Placing an Ad in your Local Newspaper

If you feel the local newspaper will be the best route for you, call their classifieds department and speak with them about placing your ad in their employment section.

Be sure to ask about:

- prices,
- the best times to run your ad and
- how they will bill you for the ad.



Find out what payment options they offer. Remember, your payroll agent may pay for advertising so check to see if this is a service the newspaper provides.

Your newspaper contact will be a good resource for what to include, what to leave out and what they have learned works best for people. Asking questions will keep you well informed so you can make the best and most cost-effective choice for yourself.

Some questions you could ask include:

- What is the cost to advertise? Per word?
- What days reach the most readers?
- Is there a discount for running an ad a certain number of days?

## Creating Your Ad

When preparing your ad think carefully about the information you will include.

Flyers can include more information than a newspaper ad because of the cost per word for the newspaper ad. Even though fewer words cost less money it may cost you more time answering phone inquiries from people who are not right for your job. For example, think about this ad:

Personal Assistant needed. \$8 hour. Flexible schedule. Call 123-4567.

People answering this ad will have to ask who they would be working for, what they would be doing, what days they would work and where the job is located.

Including more detail may help you more quickly find a person who is interested in your job. For example:

Parsons woman who loves gardening and pets is seeking a nonsmoking Personal Assistant to provide personal care, housekeeping and do errands. \$8 per hour. 8-11 a.m. M-F. Call Suki 123-4567.

Consider that adding more detail may get you phone calls from people who are better suited for your PA job. More details may “weed out” people who have little interest in the tasks, requirements or location of your job. Your goal is to write an ad that attracts applicants who may be interested in the job.

You’ll notice that we don’t recommend including your home address in your ad. You can tell the applicant your address if you decide to interview him or her. You may want to consider using the phone number of a friend or family member instead of your own. This will help you pre-screen the calls and make sure someone with the wrong intentions does not get through to you. If you have a friend or family member willing to take and relay messages for you, you may want to discuss this option with them.

## Sample Ads and Worksheet

Here are some suggestions and sample ads for you to look at as you get ready to create your own job ad for a newspaper or flyer.

### Sample Ads

#### **Personal Assistant Needed**

No experience needed; \$8.50/hour, about 20 hours/week; Help young guy who uses a w/c with personal care needs + running errands; computer skills and interest in rap music a must. Call Rob at xxx-xxx-xxxx.

#### **P/T Morning PA Wanted**

Looking for College Students to assist young mother with a disability. Duties include: personal care, errands, house cleaning. Must like kids. \$10/hour, M-F, 7 am – 11 am. Morningside Heights area. Call Renee at xxx-xxx-xxxx.

#### **P/T Personal Assistant Wanted**

\$9/hr, near university; assist woman with a disability in basic personal care and getting to school; no early morning hours! Start at 10 am; must be non-smoker who likes cats; call Carmelita – Leave message xxx-xxx-xxxx.

**Personal Assistant Needed** for weekends. \$8 hour/8 hours. Assist older but lively woman with personal care, shopping, and other errands. I love to go downtown to hunt for bargains and need person to assist on weekends only! Perfect for college student. Call Kim at xxx-xxx-xxxx.

#### **Need someone 20 hours/wk**

Personal Assistant needed to help with dressing, bathing, laundry, housekeeping. Need to be willing to go fishing with me. Must love dogs! \$9/hour. Call Jamaal at xxx-xxx-xxxx.



# IT'S IN THE CLASSIFIEDS

## WHAT TO INCLUDE IN AN ADVERTISEMENT:

### Things that make the job appealing

- Flexible hours
- Interesting person to work with
- Great location
- Rewarding work
- Good experience

### Important information to include:

- Hours of work or # of hours
- Pay
- General location (Do not give out your home address!)
- Phone number (yours or a friend's) to call or P.O. Box

## An advertisement for me might look like:

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## **Using a Job Application – The Why**

A job application for employment can be a useful tool for you when you interview a person for your PA job. Find out from your payroll agent if there is a required form or if you will need to create your own job application. There is a sample job application on the next page.

### Why Use a Job Application?

We can't stress enough the importance of using a job application! It gives you a chance to have written information you can look at later. This will allow you to spend more time talking with the person and getting a feel for their personality. It's a good idea to ask the applicant to bring a copy of their completed job application to the interview.

### A Job Application is a Valuable Screening Tool

A job application gives the potential PA the idea that this really is a job and it needs to be taken seriously.

- It will show the potential PA that you are organized and in control of your situation.
- It may assist in screening out applicants who did not realize the details that go into this kind of job.

A job application may also discourage those with questionable motives when they realize you have some standards and expectations that need to be met. It can prevent abuse from the beginning by letting the applicant know you are aware of the potential for that type of situation; and that you are on the look out for it and will not tolerate it.

Remind all applicants that all of the listed employers and personal references may be contacted unless you have agreed otherwise. For example, applicants may not want you to contact their current employer. In this case, the applicant should provide a comparable employment reference for you to contact.

# Sample Job Application

Applicant Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone (\_\_\_\_) \_\_\_\_\_

Do You Smoke?  Yes  No

Times you are available to work:

Weekdays \_\_\_\_\_

Saturday \_\_\_\_\_

Sunday \_\_\_\_\_

Are you a U.S. citizen?  Yes  No

If no, give Alien Registration Card or Work Permit Number: \_\_\_\_\_

## Transportation

Do you drive?  Yes  No

Do you have reliable transportation?  Yes  No

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

Driver's License # \_\_\_\_\_

## Criminal History

Have you ever been convicted of a felony? (A felony is defined as an offense punishable by imprisonment for one year or more.)  Yes  No

**If yes, please explain:** \_\_\_\_\_  
\_\_\_\_\_

**Education**

| <b>Name of School and Location</b> | <b>Dates Attended</b> | <b>Accomplishment</b> |
|------------------------------------|-----------------------|-----------------------|
| High School                        |                       |                       |
| College                            |                       |                       |
| Vocational                         |                       |                       |
| Other                              |                       |                       |

**Previous Employment**

| <b><u>Employer Name and Address</u></b> | <b>Dates Employed</b> | <b>Salary</b> | <b>Job Duties</b>   |
|---|-----------------------|---------------|---|
|   | From:<br><br>To:      |               | Supervisor: _____<br>Phone Number: _____<br>Reason for leaving: _____ |
|   | From:<br><br>To:      |               | Supervisor: _____<br>Phone Number: _____<br>Reason for leaving: _____ |
|   | From:<br><br>To:      |               | Supervisor: _____<br>Phone Number: _____<br>Reason for leaving: _____ |

May I contact your current/previous employers?       Yes       No  
If not, why?

---



---

**Please list any additional qualifications or skills you feel are applicable to the position you are applying for:**

|  |
|--|
|  |
|  |
|  |

**Please provide the names, current address and current phone numbers of at least two personal references who are not related to you.**

| Name | Address | Phone   |
|------|---------|---------|
|      |         | (     ) |
|      |         | (     ) |
|      |         | (     ) |

I hereby certify that the information I have provided is true and accurate to the best of my knowledge.

I am aware that if an investigation reveals any false statements or information, I will no longer be considered for employment.

If already employed, employer reserves the right to terminate my employment at any time.

I hereby authorize employer or representative to conduct a background investigation into my character and past employment history.

**Signature of Applicant**

**Date**

## Section 4 Checklist

| Section 4- Recruiting Your PA Checklist |  |
|---|--|
| Check here                              |  |
|   | I read about where to advertise.   |
|   | I understand that I could advertise using a flyer, telling friends and/or placing an ad in a newspaper.          |
|   | I read what to include in an ad or flyer.  |
|   | I know to ask the cost of a newspaper ad.  |
|   | I looked at the sample ads.  |
|   | I read about how I can use a completed job application to help me get to know the applicant.                     |
|   | I understand how using a job application can help an applicant take this job seriously.                          |
|   | I looked at the sample job application.  |
|   | I will find out if my payroll agent has a required job application for employment or if I need to create my own. |
|   | I have enough information to write an ad.  |







# SECTION 5

## Screening the Applicants

- Pre-screening for Interviews
- Guidelines for Telephone Screening
  - Sample Script
- Things to Look Out for...
- Scheduling the Face-to-Face Interview
- What if I Don't Want to Interview Someone?
- Telephone Screening Worksheet
- Section 5 Checklist



## Screening the Applicants

As a person choosing to self-direct your personal assistance (PA) supports and services you are ready to meet the applicants from which you can choose your new PA. There are several ways you could have gotten to this step. Let's take a look.

You may have used the Job Description Development Tool you found in Appendix C to figure what tasks you wanted done and if you needed a paid PA, natural supports, or assistive technology. You wrote a job description based on the tasks. You chose a payroll agent. You created an ad and identified a job application for your applicants to use.

Actually, because self-direction is based on your choices and your comfort level you may have taken each of the steps described or none of them. Preparing to meet applicants could be the first step you've chosen to do. No matter. Our advice is the same. Screen your applicants.

### Pre-Screening for Interviews

Your first contact with applicants will probably be a telephone call. Using the telephone to speak with applicants for the first time is a good way to pre-screen them. To do this, you explain the job tasks on your job description. Doing this helps the applicant decide if this is a job they think they would like.



For example, if you say: "I have a house cat" and the applicant says: "I can't be in a house with a cat. I'm allergic to cats," you'll both know this is not a good match for your job. If, on the other hand, the applicants says, "No problem, I love cats," you'll ask your next question.

Using this question and answer method during your first conversation

with an applicant will help you quickly find out which applicants do not fit your requirements. In the long run, you'll save yourself time and money. You may want to use the Finding the Right PA - Personal Preferences Assessment Worksheet included in this Toolkit in Section 2, Developing Your Job Description, to help you target exactly what you are looking for in a PA.

**NOTE:** It is illegal to ask people certain questions which provide information you can use to discriminate against people due to things like age and health. You can ask people if they are able to perform specific tasks such as bending, lifting, driving, etc. It is smart to think of the most physically demanding things you will expect an assistant to do and then ask them if they are able to do it as frequently as needed.

In Section 6 – Interviewing and Selecting Your PA, you'll find a list of interview questions you can and should ask.

Next we'll look at some guidelines or tips for telephone screening for you to think about as you plan how you will conduct your first conversation with applicants. Following the list of guidelines, you'll find a sample script that may clear up any questions you still have.



### **Guidelines for Telephone Screening**

#### Act quickly.

Call people back as soon as possible. Good people find jobs quickly.

#### Be pleasant.

This is common sense, but it bears repeating: Be friendly and pleasant on the phone.

#### Provide some basic information about the job.

- Write a list of job tasks so that you are giving the same information to every person that calls.
- If there are specific things an assistant **MUST** have – like a current driving license and “clean” record, ability to lift or move a certain amount of weight – ask these questions early. If the person is unable or unwilling to accommodate these “musts” thank them and move on.

- Let them know the needed amount of hours and days along with the hourly wage and start date.
- Tell people if you smoke or have pets, as this may eliminate some applicants.
- After giving them the basics, ask them if this sounds like the kind of job they would be interested in. If an applicant does not think this is the right job for them, this is a good time for them to say so. This is when you both can politely hang-up without wasting too much time.

Ask a few questions of the potential employees.

- Why are you interested in this kind of work?
- What experience or training do you have?
- Do you smoke?
- Occasionally, I might need you to work more hours, can you do that?

Be organized.

- Take notes. You can ask a friend to help you with this. Write down the names and phone numbers of everyone you talk to.
- You can set up a personal interview for good candidates when you talk with them, or you can call them back, after you have time to review all of your phone calls.

So, if you're confident about screening your applicants over the telephone, skip the next section: Sample Telephone Screening Script. If you still have a question or two, read on.

## Sample Telephone Screening Script

Hi, my name is\_\_\_\_\_.

I am returning your call about the ad I posted for a personal assistant.

Before we decide when to schedule an interview, there are some questions I need to ask you.



Tip: Ask questions based on your list of job tasks that you absolutely have to have done by your PA. For example, if the PA must lift you, you might say: “I weigh about 130 pounds. One of the most physically demanding requirements of this job is that you be able to roll me over in bed and help me transfer from my chair to the toilet and back again. I cannot assist you at all. Can you do this?” If your PA will need to provide transportation for you, you may want to ask if the applicant has a current driver’s license.

I need someone to assist me with: (list the tasks/activities in your job description)

- 
- 
- 
- 

You may want to ask questions like: Have you ever driven a van or other big vehicle? Or I have a cat that stays inside. Is that a problem?

Write your questions here:

- 
- 
- 
-

If you like the person's answers, you might use some of the following script or write your own.

Great, then let me tell you a little about myself. I am \_\_\_\_\_ years old and live in my own home in \_\_\_\_\_ (town). I am involved in lots of activities which require that I get up at \_\_\_\_\_ a. m. in order to be (at work or at meetings/ activities) by \_\_\_\_\_ a.m. I need someone to assist me with bathing.

- 
- 
- 

Tip: Check again with the applicant to see if the tasks you need done are tasks they will do. If the applicant says this is not the job they were looking for, thank them and hang up. If not, ask them to tell you about themselves.

Tell me a little about yourself.

Tip: You'll need to know how much you are going to pay your PA.

I pay \$\_\_\_\_\_ an hour and withhold taxes as required by law.

Tip: If s/he asks not to have taxes taken out, say "I can't do that."

Be sure and tell the applicant what days and hours you want him or her to work. If the schedule is flexible be sure to find out if this will work for the applicant. If not, thank them and hang up.

You can write in your schedule here:

- 
- 
-

Be sure to ask:

When can you start?

Ask the applicant:

Does this sound like something you'd want to pursue?

Tip: Ask yourself if you think you would like this person and if you think you would get along. If yes, go ahead and schedule a face-to-face interview. Be sure you have their correct phone number in case you need to call them.

### **Things to look out for...**

Some telephone responses are a warning of trouble. You may want to become alerted if:

- Someone asks for your home address before you are sure you want to meet them face-to-face. Use caution; remain in control of the situation.
- You specifically state in your ad that you want a female and a male calls supposedly for a female friend or wife. Do not answer any personal questions. Ask him to have his friend or wife call you herself.
- Someone calls to lay their desperate situation on you; they have to get a job and/or place to live right away. Stick to your written plan of pre-screening applicants.

You may want to consider having a friend or relative with you for support if you feel you may be nervous or anxious during this time. Remember to take notes about your impressions of each applicant following your phone call.



## Scheduling the Face-to-Face Interview

If, at the end of your telephone screening, you think you would like to interview this person face-to-face, you can make those arrangements while you still have the person on the phone. You'll want to schedule the follow-up interview promptly so you don't lose people by making them wait.



Once you have decided to interview someone face-to-face:

- pick a day and set a time for the interview and
- give the person directions to your house.

Remind the person to:

- bring contact information for their personal and employment references and
- bring their resume or application to the interview.

If you prefer not to interview at your house, negotiate a reasonable meeting place. Be sure you have each other's phone number in case one of you needs to change the interview.

**Tip:** If you are scheduling several interviews, how long do you think each interview will take? If you allow an hour for the interview and 15 minutes after the person leaves to write down your impressions, you can schedule people every hour and fifteen minutes. After a few interviews, you will know if you need more or less time.

## What if you don't want to interview someone?

You do not have to interview anyone. Let each person know you are taking names and phone numbers and will call them back if you decide to interview them. You may find that you would like to interview someone later, even though your initial reaction was not to. Taking everyone's name and address will ensure you can get back in touch with people if you change your mind.

If you are not sure, you can politely end the conversation by saying “Thank you for your time. I will be making my final selections by (date) and will notify my top choices on that day to set up another interview. Thank you again, good-bye.”

Self-directing your PA services is a rewarding job, but still a lot of work. Taking the steps to find a PA who is a good match for the job is worth the time it takes.

To help you keep track of your conversations with applicants during your telephone screening calls we have included the Telephone Screening Worksheet on the next page. You can add the information that is important to you.

| <b>Telephone Screening Worksheet</b>  |     |    |
|---|-----|----|
| After your telephone interview, take a moment and fill out the following summary. |     |    |
| Name of Applicant:  |     |    |
| Date:   |     |    |
| Phone Number:   |     |    |
| <b>Summary of Interview</b>   |     |    |
| <b>Most Important Issues for me</b>   | Yes | No |
| Applicant has a reliable car  |     |    |
| Applicant has a current driver's license  |     |    |
| Applicant can lift ____ pounds  |     |    |
|   |     |    |
|   |     |    |
| <b>Information I Provided</b>   | Yes | No |
| I gave a general overview of the job.   |     |    |
| I provided financial and benefit information.                                     |     |    |
| We discussed the hours needed.  |     |    |
|   |     |    |
|   |     |    |
| <b>Information Requested</b>  | Yes | No |
| I asked the applicant to bring:   |     |    |
| • Employment references   |     |    |
| • Personal references   |     |    |
| • A copy of the completed application from payroll agent                          |     |    |
| • Copy of driver's license  |     |    |
| • Other:  |     |    |
|   |     |    |
| <b>Personal interview scheduled</b> for (day, place, time):                       |     |    |
| <b>Overall Impressions:</b> What did I think about the applicant?                 |     |    |
|   |     |    |

## Section 5 Checklist

| Section 5 – Screening the Applicants Checklist |   |
|--|---|
| Check here                                     |   |
|  | I understand the value of pre-screening applicants.   |
|  | I read the guidelines for telephone screening.  |
|  | I decided whether I would use the sample script.  |
|  | I read about the things to look out for.  |
|  | I read how to schedule a face-to-face interview.  |
|  | I understand that I don't have to schedule a face-to-face interview with someone I don't want to interview. |
|  | I looked over the Telephone Screening Worksheet.  |
|  | I have enough information to pre-screen my applicants with a telephone interview.                           |





# SECTION 6

## Interviewing and Selecting Your PA

- The Face-to-Face Interview
  - Guidelines for Interviewing
  - Interview Notes Worksheet
  - Interview Impressions Worksheet
  - Sample Interview Questions
  - Questions You Cannot Ask
  - Realistic Job Preview and the “Look-See”
- Narrowing Down the Candidates
- Employment Contingent on Reference Check
- Criminal Background Check
- Making the Offer
- Section 6 Checklist





## Interviewing and Selecting Your PA

In the previous section, we prepared for the face-to-face interview by screening the applicants.

This screening process included:

- calling each applicant;
- asking questions and giving information about the job that helped both the applicant and you be able to decide if this job was a good match;
- deciding if you wanted to proceed to the more formal face-to-face interview; and
- making notes to read later.

By screening your applicants with a telephone interview, you save time and money and come up with a list of people who are interested in your PA job.

Now, you're ready to meet the applicants!

### The Face-to-Face Interview



The face-to-face interview gives you the opportunity to learn as much as you can about the person who is applying for the job. It also gives the applicant information about the job requirements so that both of you can make a good decision. This works best if you are prepared.

### Guidelines for Interviewing Face-to-Face

- Be safe
  - Hold the interview in a location that is safe for you. Your local church, apartment building or community library may have rooms available for you to conduct interviews if you do not want to use your home.

- You can invite a friend to sit in. In addition to safety concerns, having a second person is a good idea because that person may notice things during the interview that you do not.
- Setting the tone of the interview
  - First impressions are important. Show that you are a capable individual able to direct your own services.
  - If you have a friend present, make sure it is clear that you are the interviewer.
  - Think about the location of the interview. A living room is a better choice than the bedroom, which could make you appear dependent.
  - Dress comfortably, but be sure you look like an employer, someone who knows what you want.
  - Sit facing the applicant so that you can observe eye contact and body language.
  - Eliminate distractions. Turn the TV and radio off. Make sure pets and children will not interrupt.
- What if you are nervous?
  - It is natural to feel nervous when interviewing.
  - The applicant is probably nervous too.
  - Being prepared for the interview may lower your anxiety level.
  - Having a friend or family member with you may help calm your nerves.
- Be prepared. Before the interview, make sure you have:
  - A blank job application form, if needed.
  - The job description.
  - Information about your needs or your disability.
  - Information about special equipment you use.
  - A way to record your impressions (write them yourself, have a tape recorder or ask a friend to act as recorder). Taking notes on each applicant during the interview will help you remember their answers. This is important if you are talking with several applicants.
  - A list of the interview questions you will ask.
- Planning the interview questions

- Decide ahead of time what questions you will ask, and write them down.
- Be sure your interview questions give you the information you need. (At the very least, you want someone who is trustworthy, reliable and responsible. Ask questions that will give you that information).
- Use the same list of questions for each applicant so you can compare their responses more easily.
- Make sure you know the questions that are legal to ask.

### What to do when the applicant arrives



Find out as much as you can about each applicant. You will be making a decision to hire someone based on just a few contacts, a job application, reference and background checks. It is important to make the interview matter. Your health, safety and well-being

are dependent upon the choice you make.

- Check them out.
  - Do they look neat, clean and presentable?
  - Do they seem comfortable around you?
  - Do you feel comfortable around them?
- Make the applicant feel comfortable. You can ask, "Did you have any trouble finding the house?" or "Isn't this a beautiful, sunny day?" A discussion about the weather is always safe and helps people relax.
- Have the applicant fill out the job application if it is not already complete. You need a copy of the job application. Then give him or her the job description to look over. This will give you time to review the job application. Pay attention to:
  - Past experience
  - How does the job application look? Is it neat?
  - How specific is it?
  - Are all the blanks filled in? (Does it include work experience and education?)
  - What are the employment patterns? (Are there frequent job changes?)

Red flags on the application:

- Gaps in employment (any time period of over one or two months - ask for more details)
- Omissions (educational, former employers -- ask for details)
- Inconsistency (dates do not make sense -- ask for details). If you have questions about any of the information on the application, the interview is the place to ask them.

- Explain your needs or disability, as far as you feel comfortable. Give information that would be important for someone to understand if she or he was helping you.
- Review the duties on the job description and checklist.
- Ask the interview questions. Your interview questions will help you learn more about the applicant. A few specific questions may help you decide if the applicant has the skills they need. Try asking questions the applicant can answer with real examples of their experience in the areas that are important to you. This will help you get more information than you can with simple “yes” or “no” questions.

For example:

Don't ask “Can you cook?” instead, ask:

- “What is the last meal you cooked?”
- “What is your favorite dish to cook?” or
- “Tell me how you make fried chicken.”

Be sure to write down the answers. Remember to ask someone to write for you if you want help. Have a method for recording responses. You might use something like the Interview Notes and Interview Impressions Worksheets on the next two pages. You may want to make notes after each question so you remember what the applicant said and compare answers. You may also want to write down other impressions during the interview or right after the interview.

## Interview Notes Worksheet

Notes can be written by a friend if you decide that is what works best for you.

| Interview Questions | Answers/Notes |
|---------------------|---------------|
|                     |               |
|                     |               |
|                     |               |
|                     |               |
|                     |               |
|                     |               |
|                     |               |
|                     |               |

## Interview Impressions Worksheet

Applicant name:

Date:



|  | 5 | 4                   | 3  | 2 | 1 |
|--|---|---------------------|----|---|---|
| 1. a. Spoke directly to me instead of my helper.       |   |                     |    |   |   |
| 1. b. <u>If not</u> , corrected this when pointed out. |   |                     |    |   |   |
| 2. Listened to me and tried to understand me.          |   |                     |    |   |   |
| 3. Seemed comfortable with me.                         |   |                     |    |   |   |
| 4. Looked neat and clean.                              |   |                     |    |   |   |
|  |   |                     |    |   |   |
|  |   |                     |    |   |   |
|  |   |                     |    |   |   |
|  |   |                     |    |   |   |
|  |   | Circle your answer. |    |   |   |
| Has own phone?   |   | YES                 | NO |   |   |
| Reliable transportation?                               |   | YES                 | NO |   |   |
| Talks too much?  |   | YES                 | NO |   |   |
|  |   |                     |    |   |   |
|  |   |                     |    |   |   |
|  |   |                     |    |   |   |
| I would hire this person.                              |   | YES                 | NO |   |   |

Notes:

After you have completed your interview questions, ask applicants whether they have any questions. You can learn a lot about how well your applicants understand your needs by the questions they ask.

### Be sure to discuss:

- Duties and responsibilities of the job
- Specific hours and days of work
- Rate of pay, method and time of payment
- Arranged time off
- How the PA will be trained
- How their performance will be evaluated
- How complaints/concerns will be handled
- How much notice is expected from the PA and employer for termination of services
- Whether the working relationship will be formal or informal
  - A formal working relationship might mean that you prefer a set schedule of when your PA comes to work and a set list of tasks.
  - Informal might mean that when your PA arrives you'll have decided the schedule for the day.

### Things to look out for...

- An applicant who:
  - Is rude
  - Is late
  - Discloses confidential information about previous employer
  - Takes control of the interview
  - Expresses sympathy, being overly considerate or hypersensitive
  - Smells of alcohol
  - Has greasy hair and dirty fingernails
  - Stares or makes prolonged eye contact
  - Makes little eye contact (Keep in mind it might mean the person is shy or from a culture that finds too much eye contact disrespectful.)
  - Begins the interview by telling you all the things s/he cannot do or all the times s/he cannot work
  - Has no references (Even someone who just moved here should have friends or previous employers elsewhere.)
  - Says s/he just really needs a job and will take anything for now

- Looks to the non-disabled person in the room for instructions and approval

### Avoid these interviewing mistakes



- Do not talk too much. The more the applicant is able to talk to you, the more you can learn about them.
- Do not fail to follow up with related questions. For example, if the applicant tells you they have had training, ask for more details. Where did they get this training and how long did the training last? What did they learn from the training that can be applied to this job?

### Sample Interview Questions

Below are some sample questions. Pick and choose the ones you want to ask. Try to think of any questions not on this list that could fit your particular situation. You will want to ask questions that link back to the job description you developed.

- Tell me a little about yourself.
- Tell me about your experience working with people with disabilities.
- What do you like best and least about the work you have done in the past?
- Are you available for additional hours? How much notice would you need if I need extra help?
- Are you comfortable using assistive technology or other DME (durable medical equipment)?
- Are you able to think quickly on your feet? Give me some examples.
- How do you handle differences of opinion with an employer? Can you give me an example?
- How do you handle constructive criticism? Give me an example if possible.
- How do you deal with another person's anger or frustration?
- Do you feel comfortable assisting with bowel or bladder routines?



- I need a driver with a clean driving record. Will there be any problems when my insurance company runs your driving record?
- Can you drive a vehicle with a stick shift?
- Do you have experience driving a full-sized van with a high top?
- Do you have experience with city or long-distance driving?
- Are you available for out of town travel? Would your schedule allow you to stay somewhere overnight? How much advance notice would you need?
- Describe your best qualities.
- Describe your worst qualities.
- Do you prefer/require lots of supervision, or just a task list?
- Have you ever been fired from a job? If so, why?
- Do you have any questions/concerns about the job?
- Is there anything on my list of duties you cannot provide?
- If selected for this position, when could you start work?

### Questions You Cannot Ask in an Interview

It is important to ask all the questions you need to in the face-to-face interview. It is just as important to know the questions that are illegal to ask. Check out this list for questions NOT to ask.

- How old are you?
- What is your native language?
- Are you married?
- Do you have any children?
- Have you ever been arrested?
- Do you belong to any religious affiliations?
- Do you belong to any clubs or organizations?
- What is your credit rating?
- Do you own or rent your home?
- Do you own a car?
- What country were you born in?
- Do you have any addictions?
- What is your star sign?
- Do you have a disability or medical condition?
- What is your political affiliation?
- What are your family members' names?
- What is your race?
- Where are your family members employed?

## Realistic Job Preview and the “Look-See”

A realistic job preview helps the applicant avoid having to say later, “If I had known what I was getting into I would never have taken this job.” A job preview includes information about the actual work the PA will do. Include positive and fun, as well as, difficult or unpleasant tasks to help the applicant understand the actual job tasks you need done. By giving the applicant the information they need to understand the job, your PA will be less likely to quit when a better opportunity becomes available.

If you interviewed the applicants in a public place, at some point you may want to tell them the area in which you live so they can decide if the location is going to work for them. If you’re interviewing for someone else, now may be the time to conduct a “look-see.” Introducing the applicant and the person with a disability may help decide if the job and the applicant are a good match.

## **Narrowing Down the Candidates**

Once you have completed all your interviews you will be ready to choose your top candidates. Review the answers the applicants gave you to the interview questions along with any personal notes you may have made to yourself. If you had a friend or family member with you during the interviews, compare notes with him/her.



## Keep Names & Phone #s of Top Choices

You may want to keep a list of names and numbers of your other top choices and ask them if they would be willing to work as a back-up PA. This list could also be useful if the PAs you hire do not work out for some reason. You could refer to your list for a replacement PA.

The next step is to check references.

## **Employment Contingent on Reference Check**

Checking employment and personal references is a very important part of the interview process. You can check employment references before or after the initial interview. NEVER hire someone before checking their references. You can offer the job to your top applicant but tell them the offer is only available after satisfactory reference and background checks.

References can give you a much clearer picture of the applicant's work history and background. Remember, past employers may legally answer only certain questions about past employees.

You should always check references of someone you are planning to hire, even if you think you know the person well. You can either call or write for a reference. You may find it easier and faster to phone, although many employers require a written request with a signed release of information by the applicant. Even with a signed request, many employers will only tell you the dates that a person worked for them.

If an applicant has asked you not to contact his/her current employer, please respect this, as the employer may not know about the interview. Remember to ask the applicant for another employment reference for you to contact.

### Questions to ask previous employers

Some possible reference questions for previous employers would be:

- Would you hire this person again?
- Was this person reliable, did he or she show up on time?
- Are these accurate dates of employment?

### Checking personal references

Personal references, on the other hand, are often willing to talk to you on the phone, and will often provide detailed information. Be sure to get personal references from appropriate people. Talking with someone's spouse, parent or best friend is not always the most objective reference. You may want to talk to a co-worker, a teacher, a supervisor or other person who knows them.

Personal reference questions:

- How long have you known this person?
- What is your relationship with this person?
- Would you recommend this person to provide personal assistance services?

### Compare reference responses to applicant information

Once you have checked both employment and personal references for all of the applicants, you should compare this information with the information you received from the applicant.

- Look for any differences in the information they gave you. If a reference states a reason why the applicant can or cannot do the job, consider this information.
- Remember to trust your own initial instincts as well.
- Refer back to the notes you made to yourself during the interviews so you will not forget the impression each person made on you.

We've included a Personal or Employment Reference Form on the next page that you can use for a personal and an employment reference. It can be used for either a telephone or a mail reference check. Since there may be questions you want to add, looking at this form can help you create your own form.

## Personal or Employment Reference Form

Name of Reference: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Check one:     Personal Reference     Employment Reference

I, \_\_\_\_\_ (Name of Applicant), give permission for the above named person to provide reference information regarding my possible employment.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

Dear \_\_\_\_\_,

\_\_\_\_\_ (Name of Applicant) has applied for a position with me as a personal assistant. This will involve assisting me with tasks of daily living and housekeeping chores.

1. Can you tell me when the applicant worked for you?

2. What was his/her job title? What were his /her job duties?

3. What can you tell me about his/her job performance?

4. Was s/he on time to work? Were there any problems with not showing up or taking too much time off?

5. Do you consider him/her to be an honest person?

6. How well did s/he take supervision and criticism?

7. Would you recommend him/her for a personal assistant job? Why or why not?

8. Would you rehire this person?

---

Name of person providing information  
(Please print name)

---

Date

## Criminal Background Check



Kansas requires that your payroll agent complete a criminal background check of your new PA. You, as the employer, need to be sure that your applicants know that a background check will be conducted. If they have a history of neglect, abuse or exploitation, they cannot be hired which may eliminate some of your applicants. Better now than later.

There is a possible exception to this requirement. It is possible that you may be able to choose to hire someone as a PA who has a criminal record in an area other than abuse and neglect. You must talk this over with your payroll agent.

## Making the Offer

Once you have made your decision, call and offer the job to the person you want to work for you. This is a very exciting and anxious time, so be prepared ahead of time for all that is coming up.

### Your Choice

After you have considered everything and made your top choice(s), you are prepared to call and offer him/her the position if his/her references check out and the criminal background check comes back clean.

You might want to offer the job to your top applicant and give him or her a “night to sleep on it.”

- Encouraging the applicant to take one more day to think about accepting the PA job gives him or her another chance to make a decision that is right for them. If the person changes his mind from one day to the next, then maybe it isn't the right job for them. The applicant who is really interested will still be interested on the next day.

You may hire the person contingent on a satisfactory criminal background check. Your payroll agent will conduct the background check. Make sure your PA understands that if anything negative comes back on the check, you have the option to terminate their employment immediately. Be sure your new employee understands that if their background check shows abuse and/or neglect their employment will be terminated.

The time you spend before hiring your PA will likely pay off after the hire. The very best match comes when the personal assistant likes the job and the people he or she works with. Feeling valued, enjoying the people in the environment and having respect for each other and the job contributes to loyalty and commitment between you and your PA.

### Complete Necessary Paperwork

After you have offered a job to a new person and they accept, all of the necessary paperwork must be completed before they can begin work. Set up a time when you can meet. You will need to obtain the forms to complete from your payroll agent.

When your new employee arrives to pick up a “New Hire Packet,” have them complete their paperwork. You will be responsible for completing some of the paperwork yourself. This packet of information will need to be mailed or taken to the payroll agent. Your payroll agent will also request a copy of the new hire’s Social Security card and driver’s license or other form(s) of identification. You may want to keep some “New Hire Packets” from your payroll agent at your home.



## Section 6 Checklist

| Section 6 – Interviewing and Selecting Your PA Checklist |   |
|--|---|
| Check here   |   |
|  | I read the guidelines for interviewing.   |
|  | I looked at the sample interview questions.   |
|  | I understand there are questions I can't ask.   |
|  | I read how to conduct a face-to-face interview.   |
|  | I understand the importance of checking both employment and personal references.          |
|  | I understand that my payroll agent will conduct a criminal background check of my new PA. |
|  | I know that I will have to turn in paperwork to my payroll agent.                         |
|  | I have enough information to select and hire the most qualified applicant.                |



# SECTION 7

## Training Your PA

- Preparing Your PA to be Successful
- Setting Your Expectations
- PA Rights and Responsibilities
- Learning Styles
- Understanding Culture
- Training
- Orientation
- PA Task Planning Worksheet
- Section 7 Checklist



## Training Your PA

Finally, you've hired your Personal Assistant (PA) and you're ready to go back to your real life. Not so fast! You've spent a lot of time creating your job description and finding someone who fits into your life with the qualities that are important to you. To be sure all of your hard work pays off, you will train the PAs you hire so they have the knowledge they need to provide the services you want.

This section on training will look at:

- setting your expectations early,
- some ideas to help you provide the training your new PAs need and deserve, and
- some tips for orientation on your PA's first day.

### Preparing Your PA to be Successful

In Section 2 - Developing Your Job Description, you identified the qualities and skills your PA should have to be able to do the tasks that you outlined in your job description. You and your PA agreed to these tasks when you both signed the job description. In this section, Training Your PA, let's start by taking a look at your expectations of your PA's job performance. To do this you will look at each of your job tasks and determine what your PA must do to do the task right. Remember that the clearer you are with your expectations, the less likely there will be any misunderstandings.



For example, your job task is “work from 8 a.m. to 10 a.m., Monday through Friday.” One of the qualities you want your PA to have is to be punctual. The job starts at 8 a.m. What are your expectations? In other words, what does “start at 8 a.m.” mean to you? Do you mean that your PA walks in the door at 8 a.m. and spends 5 minutes getting ready to work? Do you really mean: come 5 minutes early and be ready to start work at 8 a.m.? Or do you mean come to work around

8ish? Deciding what your expectations are for your PA's job performance will save you time and effort.

## Setting Your PA Performance Expectations

Take a look at some ideas to get you started thinking about PA performance expectations in these areas:



- communication
- attitude
- crisis management
- personal appearance
- time management
- work schedule
- record keeping
- confidentiality

You may find it helpful to highlight or underline the performance expectations in these lists that are most important to you. As you work through each item, decide if there is an expectation you have that is not listed and write it in. There is space at the end of each area.

### Communication:

PA must be able to communicate with employer using the employer's preferred use of language (for example, language spoken, sign language, communication device, etc.). PA must be open and honest at all times and able to discuss issues that may be uncomfortable. S/he must be willing to accept direction from employer and follow that direction. S/he must be able to accept disciplinary action and/or suggestions as directed by employer.

Other

- 
- 

### Attitude:

#### Work Commitment

PA will leave personal problems at home and report to work in good spirits. PA will be ready to provide quality care and make every effort to do a good job and meet the needs of employer as directed.

### Building Relationships

PA will work to develop and maintain a friendly and professional rapport with the employer.

### Teachable

PA must be willing to be trained and learn the employer's preferred methods of service provision. Training may be an ongoing and/or changing process as the needs of the employer may change. Be flexible and open to changes that may be necessary.

### Respect

PA will always use proper manners when speaking to and working with employer. Whether in the home or out in the community, PA will show respect to their employer by the way they speak, act and provide assistance.

### Other

- 
- 

### Crisis Management:

#### Problem Solving

PA must be able to assess needs within agreed upon duties and present reasonable solutions or a plan to meet those needs. S/he must be able to remain calm and look at any situation rationally.

#### Emergency Care

PA must have the ability to remain calm and provide immediate care to employer in order to ensure his/her health and safety and prevent further danger or injury. S/he must be able to contact emergency services in order to resolve the situation (for example, police, ambulance, fire department). PA must follow emergency procedures as outlined by the employer. See Section 9 for some emergency planning ideas.

### Other

- 
-

## Personal Appearance:

### Dress Code

PA will wear proper attire during working hours. The employer decides but proper attire should consist of comfortable clothing and shoes. This may include nice shirts, no torn shirts or shirts with vulgar logos. Pants should fit properly, not hang down or be too baggy or too tight. Shorts and skirts should not be too short. Shoes should be nice tennis shoes or comfortable working shoes.

### Cleanliness

PA will practice good personal hygiene before reporting to work. It is important that the PA be clean and smells clean. Wear hair in a manner that it will not be in your face or get into food, or your employer's face. Do not wear perfume or cologne.

### Other

- 
- 

## Time Management:

PA will complete all jobs on time. Be sure to maintain quality of care. If the PA feels more time is needed to complete a task, discuss it with the employer to avoid creating a stressful environment.

### Other

- 
- 

## Work Schedule:

### Punctuality

PA will report to work on time and be ready to begin.

### Schedule/Reporting

PA will be considerate of the employer's scheduling needs and will call employer in advance or as soon as is possible if the PA is unable



to make it to work or will be late. If the PA needs to schedule regular or expected time off, the PA must do so at least two weeks prior to the date(s) needed.

Other

- 
- 

Record Keeping:

PA will maintain time sheets, any daily log documentation necessary, employer's calendar of appointments if necessary and work schedule. All documents will be kept neat and organized in space designated by employer. Note that the State of Kansas and Medicaid can charge a PA with fraud if he or she records hours on a time sheet that they didn't work.

Other

- 
- 

Confidentiality:

PA will not share any information learned about employer with any person or agency without the employer's expressed written consent. This includes but is not limited to medical history and condition, personal preferences, personal care needs, family information, personal finances and appointments.

Other

- 
- 

Developing Policies and Procedures

As you become an experienced employer, you may find that some behaviors just have to happen. For example, PA's cannot have a pattern of being late and work for you. You may establish a policy that applies to being late. You might say that being late three times automatically means

that the employee's job will be reviewed. This lets your PA be aware up front that his or her behavior has consequences. For some ideas about policies, check out Appendix F.

## **Rights and Responsibilities of the Personal Assistant (PA)**

As you prepare for your working relationship with your new PA, consider that your PA has some things he or she will expect from you. As you well know, with any list of rights comes some responsibilities. You may want to review this list, or one that you write, with your PA as you begin orientation and training.

### PAAs have the right to:

- be treated with respect
- be provided with equipment and supplies that are needed to complete assigned duties
- receive requests for any additional duties or schedule changes with as much advance notice as possible
- request time off with adequate notice
- be paid on time
- work in a pleasant, safe, non-threatening environment

### PAAs responsibilities include:

- Always be on time
- Be honest and open about his/her feelings
- Knowing their own skills and limitations and be able to discuss them with employer
- Provide reliable, safe, high quality services, as directed
- Respect employer and his/her right to privacy and confidentiality
- Notify employer as soon as possible when s/he knows that s/he will be late or unable to work
- Plan time off with employer and give ample notice
- Give at least two weeks notice before making changes or quitting
- Complete job duties as directed
- Accurately recording the hours that they work

## Learning Styles

Adults learn best when training material is presented in a way they prefer. Some people like to learn by reading the directions, some by watching a demonstration, while others want someone to tell them the material. You can help your PA be successful by presenting your training in ways that match your PA's preferred learning style.

Many trainers use a strategy that you may find helpful. They present their task or information to be learned in several different ways or learning styles.

Examples:

- Visual learners want to see the information they are learning, so consider writing out the steps to the task, including a chart, or a picture.
- People who learn best by listening will do well if you explain what you want done.
- Some people will want to see and hear the information.
- Others will need to try the task for themselves.

Check often to determine if your PA understands what you are training.

People have their own best ways to learn. A discussion about learning styles with your PA will help you plan your training.



### Understanding Culture

Just as presenting material in a person's best learning style promotes learning success, being sensitive to other people's point of view and background encourages open communication

between you and your new PA. As you get to know your PA check often for mutual understanding of tasks and instructions.

For example:

- When you say, “Please put away the milk”, you may mean: put the milk back in the refrigerator. In some cultures, milk is properly put on a shelf in a cabinet.
- When you ask if someone is a good cook, you may mean something other than microwave cooking. Checking for understanding will help you and your PA avoid unnecessary miscommunication.

Being culturally aware includes different ethnic and cultural backgrounds but can also apply to a difference in ages, being brought up in a different part of the country or being from a city or a rural area. People grow up eating different foods, relating to people in different ways, and enjoying different recreational activities. Being from different cultural backgrounds can be an interesting and positive experience for you and your PA by recognizing differences, listening carefully, and keeping the lines of communication open.

## **Training**

At first, it may seem awkward to train someone to assist you, but in time, it will become natural. Remember, you are the best person to train your PA to work for you. You probably have more experience in training others than you realize.

- You may have told family members, friends or other staff how to meet your needs.
- There may have been times away from home, at camp, school, in the hospital or on a business trip when you instructed a stranger on how to help you.

Training your new PA will be similar to that experience. Only this will involve more detailed structure and you now have your own tools (job description, checklists, guidelines, etc.) to help you as you train.

If the whole idea of training someone seems too overwhelming, remember you don't have to do this all alone. Get help from someone who is familiar with your needs such as a family member, trusted friend or your case manager.

## Getting Started

It is best to start training a new PA when there are no timelines to meet. Plan enough time so both of you can be as relaxed as possible without being rushed. Don't squeeze everything into one session.

Expect your new PA to be nervous. If you have never used a PA before, you may be nervous too. This is OK. Just remember to take your time and talk openly with your PA so you will both be comfortable. The training process is tiring, try to have patience and keep your sense of humor. It can be a lot of fun getting to know this new person in your life.

You'll notice there is often a huge improvement in performance of job duties between the first day and the second day. As the days go by, there should continue to be improvement as you establish a rhythm of how to work together. Some people say that it seems to take about five days, or five 2-hour sessions, to break in a new person. It's helpful when the trainee can work these five times fairly close together. If he or she is only scheduled to work once a week, training can take a whole month, and you may have to quickly review what you did the last time before the start of each training session.

## What Will You Teach?

This is where you get part of the pay off from all your work developing your job description. When you and your PA signed the job description, you agreed on the duties and responsibilities that make up the job. This is the list of what you want your PA to do, so DOING these tasks to your satisfaction is WHAT you'll train your PA to do.

## Choosing Your Method

If possible, you may want to have a PA who already works for you to be a part of the training. It can be helpful for your new PA to watch how you like things done. Even if it is a family member or friend who helps you, see if they are willing to help show your new PA how the two of you do things, and what works best. Of course, you may prefer it be just the two of you. If you feel this is the easiest way to train your PA, then that is the way you should do it. Choose the method that is best for you.

If you have personal care needs that you plan to receive assistance with, you may consider making a videotape for your PAs to view in order for them to learn the way you want them to assist. Sometimes it is difficult to verbally direct someone through a task involving hands-on assistance. Some of the tasks you may consider making a videotape for may include:

- Range of motion exercises
- Safe transfers and lifting procedures
- Lift equipment operation



### **Some tips for making your own personal PA Training Video**

- Decide what tasks you want to show on the video.
  - Have someone run the camcorder while you have an assistant performing the task to be videotaped.
  - As the assistant is performing the task for the taping it is also helpful for you or them to explain what they are doing. For example, when moving the lever to lower the lift he or she may say, “The lever to lower the lift is on the left side. It must be pressed down until the sling is at the same level as the bed.”
- After completing the taping of all desired tasks label the tape “PA Training Video.” You may consider covering the videotape case with brightly colored contact paper so that it will be easy to find if it is stored with other videotapes in your home.

### **Training Tips**

1. To start each training session, tell your PA what you will teach. At the end of the session, summarize what you have taught. Many trainers use this strategy, which is simply:
  - tell them what you’re going to tell them
  - tell them what you want them to learn
  - repeat what you told themIf you have a second session, briefly review what you taught in the first session and then begin your new material.

2. When giving instructions for a task, such as transferring out of the wheelchair, describe each step of the task.
3. Do not assume that your PA will understand your explanations. Ask for feedback and encourage questions.
4. When you explain any task or routine to your PA, describe why it is important to you that something is done in a certain way or at a specific time.
5. Be consistent in your explanations, and if you change your task or routine, explain why you have changed it.
6. Be patient. Your PA probably will not get all your directions right the first time.
7. Try to be aware of how much new knowledge the PA can learn effectively. Some individuals may be able to learn a whole task or routine at once, while others may require more gradual training sessions.
8. If possible, have a friend, family member, or previous PA demonstrate tasks and routines to your new employee.
9. Give your PA both constructive feedback and positive feedback. For example:

- **Constructive feedback:** Your PA won't know they are doing something wrong unless you provide appropriate feedback.

When your PA does a procedure incorrectly, bring it to their attention and patiently remind him or her of the correct way to do it.

- **Positive feedback** praises correct performance by telling your PA exactly what was performed correctly.

Examples of positive feedback:

“My hair feels so clean. You really did a great job of washing it today.”

“Lunch tasted very good. The chicken was cooked just right.”

For additional training resources, classes, and materials, contact your local community developmental disability organization, your community service provider, or center for independent living.

## Communication

Getting a sense of yourself as an employer may be hard at first. You are responsible for making decisions about your personal care. Never assume the PA knows what you mean or what you need. Be assertive, be direct and set boundaries.

Personal care tasks, such as bathing, dressing and toileting can be uncomfortable at first. We all have to deal with these issues on a daily basis. Be assertive and make your instructions clear and easy to understand. Sometimes a sense of humor helps put everyone at ease. Using a written checklist might help.

When you begin the actual process of training your PA, remember to be patient. S/he may not get everything the first or even the second time. It is important for you to be direct and continue instructing until you both feel secure.

Setting boundaries will help you establish your role as well as the PA's role. This will give both of you a better sense of the employer/PA relationship. Talk often about what you and the PA expect from each other.

Open communication with your PA is your best defense against misunderstandings and disagreements. You'll find more information about resolving misunderstandings and disagreements in Section 8 – Managing Your PA (look for Resolving Conflict).

## **Orientation**

### Getting Ready for the First Day



The first day you begin work with your PA will be exciting and you might feel a little nervous. Your PA is probably nervous too. Your PA's first day is the perfect time to begin formal orientation and training. This gives you the opportunity to discuss your expectations and clearly explain the job duties. Try to schedule



the first day at a time when you will not have to rush. You will both feel better if you are able to be relaxed and take your time. When your new PA arrives, take a minute to have a friendly conversation and then start them on completing all necessary employment paperwork.

As you prepare for your new PA's first day of employment consider:

- Having a friend with you the first day
- Going about your typical routines
- Not minimizing your needs
- Being as organized as possible
- Thinking ahead: If your PA will be grocery shopping for you, decide how you want your PA to pay; such as having cash available or if you will pay them back after they make the purchases. Remind your PA of your need for receipts for store purchases.
- Setting your schedule for housekeeping and appointments
- Discussing feedback opportunities
- And at the end of the day, telling your new PA the things they did well.

Orientation and training are important even if your PA has experience because your situation is unique and different. Set a tone during orientation and training that you are the employer. Even though you may have discussed some of this information during the interview, orientation of a new PA should include:

1. A tour of your living space.
  - a. Show your new PA where supplies and equipment are kept.
2. Information about your disability.
  - a. Discuss your disability and anything specific your PA should know (i.e., Do you get more fatigued as the day goes on? Are you sensitive to cold? Do you have days that you can do more for yourself than other days?).
3. Explanation and Demonstration of PA duties.
  - a. Give an overview of the job duties.
  - b. Use a checklist, job description, or other method you prefer to explain specific duties in the order you want them done.
  - c. If it is possible, a great way to train your new PA is for them to observe an experienced assistant completing all the tasks. If

you have extensive attendant care needs you may find that you need more than one day to demonstrate job duties.

- d. Training instructions should be step-by-step and specific.
  - e. Consider making a training video.
4. Safety and Security
- a. Lifts and Transfers - Review safe procedures for completing lifts and transfers.
  - b. If you are requiring your PA to physically lift you, train them in proper lifting procedures to avoid injury to either one of you.
  - c. Discuss safety guidelines for any disability-related equipment the PA will be expected to use.
  - d. Reinforce safety guidelines for any household appliances or equipment the PA will be expected to use.
  - e. Discuss your emergency plan with your PA. For more information see Section 9.
  - f. How will your PA get in and out of your home? If you are not able to open the door, set up a procedure so that the PA can get in.
  - g. Universal Precautions - Reinforce the importance of washing hands thoroughly before preparing food, and before and after personal care duties. Discuss the use of plastic gloves if preferred.
5. Expectations – We started our discussion of training with some ideas to get you thinking about your expectations of your PA’s performance. Orientation and training starts on the first day. This is the perfect time to make sure your PAs understand what you expect. You’ll want to stress the topics important to you. Here are some examples to get you started.
- **Confidentiality** - What you say and do in your home should remain confidential. The kind of help being provided by your PA is not to be discussed with their friends, family members or other individuals they may work for. Be specific. Some people think that as long as they are not saying something bad about you, then what they say is not a violation of confidentiality. The PA should be reminded that it is not only disrespectful, but that violating confidentiality can be grounds for termination.

- **Use of household items** - Give some thought to your rules regarding use of the phone, the car, the washing machine, and computer/printer and eating your food. State these rules clearly at orientation. It is always easier to state the rules clearly during your first meeting, than to wait until after an offense has happened.
  
- **Other**

6. Review the rate of pay, schedule, and time sheet reporting requirements.

|   |
|---|
| <b>Good Idea:</b> Introduce your PA to other PAs if possible. Peer support is just as helpful for you as it can be for your new PA. |
|---|

Helpful Tools:

We have included four PA Task Planning Worksheets on the following pages. There is one for each of the categories: Personal Care, Domestic/Household, Health & Safety and Community. You may want to use these or develop your own to help you as you train your new PA.

**PA Task Planning Worksheet – PERSONAL CARE**

| <b>Personal Care</b>  | <b>Day</b> | <b>Task</b> | <b>How often?</b> | <b>How long?</b> | <b>Time of day</b> | <b>Notes</b> |
|---|------------|-------------|-------------------|------------------|--------------------|--------------|
| Example Tasks:  |            |             |                   |                  |                    |              |
| Taking a bath   |            |             |                   |                  |                    |              |
| Brushing teeth with electric toothbrush   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
| <b>Reminder:</b><br>Think about natural supports and assistive technology options |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |

**PA Task Planning Worksheet – DOMESTIC/HOUSEHOLD**

| <b>Domestic/<br/>Household</b>  | <b>Day</b> | <b>Task</b> | <b>How<br/>often?</b> | <b>How<br/>long?</b> | <b>Time<br/>of day</b> | <b>Notes</b> |
|---|------------|-------------|-----------------------|----------------------|------------------------|--------------|
| Example<br>Tasks:   |            |             |                       |                      |                        |              |
| Making a<br>grocery list  |            |             |                       |                      |                        |              |
| Assisting<br>with<br>preparing<br>dinner  |            |             |                       |                      |                        |              |
|   |            |             |                       |                      |                        |              |
|   |            |             |                       |                      |                        |              |
|   |            |             |                       |                      |                        |              |
|   |            |             |                       |                      |                        |              |
| <b>Reminder:</b><br>Think about<br>natural<br>supports<br>and<br>assistive<br>technology<br>options |            |             |                       |                      |                        |              |
|   |            |             |                       |                      |                        |              |

## PA Task Planning Worksheet – HEALTH & SAFETY

| <b>Health &amp; Safety</b>  | <b>Day</b> | <b>Task</b> | <b>How often?</b> | <b>How long?</b> | <b>Time of day</b> | <b>Notes</b> |
|---|------------|-------------|-------------------|------------------|--------------------|--------------|
| Example Tasks:  |            |             |                   |                  |                    |              |
| Reminder to take medicine   |            |             |                   |                  |                    |              |
| Assist with mowing the grass  |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
| <b>Reminder:</b><br>Think about natural supports and assistive technology options |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |

**PA Task Planning Worksheet - COMMUNITY**

| <b>Community</b>  | <b>Day</b> | <b>Task</b> | <b>How often?</b> | <b>How long?</b> | <b>Time of day</b> | <b>Notes</b> |
|---|------------|-------------|-------------------|------------------|--------------------|--------------|
| Examples:   |            |             |                   |                  |                    |              |
| Drive me to work  |            |             |                   |                  |                    |              |
| Provide support for me at meetings  |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
|   |            |             |                   |                  |                    |              |
| <b>Reminder:</b><br>Think about natural supports and assistive technology options |            |             |                   |                  |                    |              |

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PA Signature \_\_\_\_\_ Date \_\_\_\_\_

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Employer Signature \_\_\_\_\_ Date \_\_\_\_\_

Training your PA is a big job and a big responsibility and who better to do it than you? We hope this information will be helpful to you as you provide the necessary training for your PAs. Good luck!

## Section 7 Checklist

| Section 7 – Training Your PA Checklist |   |
|--|---|
| Check here                             |   |
|  | I'm willing to do the work it takes for my PA to be successful.                   |
|  | I have thought about the performance expectations I have for my PA.               |
|  | I understand that I can train my PA myself or have assistance.                    |
|  | I understand that I can use my job description to plan what training is required. |
|  | I read about choosing my training method.   |
|  | I understand the importance of positive feedback.                                 |
|  | I read the section on orientation.  |
|  | I looked at the planning lists and forms.   |
|  | I have the information I need to train my new PA!                                 |







# SECTION 8

## Managing Your PA

- Being Assertive
- Supervising Others
- Keeping Your PA
- Resolving Conflict
- Evaluating PA Job Performance
- Terminating Employment
- Job Performance Evaluation Forms
- Section 8 Checklist



## Managing Your PA

Directing your own personal assistance (PA) services and managing employees is a job many people find very satisfying. Section 8 - Managing Your PA is a brief look at six management issues. They are:

- Being assertive
- Supervising others
- Keeping your PA
- Resolving conflict
- Evaluating PA job performance
- Terminating employment

Let's begin with being assertive.

### Being Assertive

Supervising your PA is not like any other kind of working relationship. Most other employer/ employee relationships do not involve such personal contact. In order to be a good supervisor and be sure your needs are being met you will have to be assertive. You will have to be comfortable expressing your needs and how you want things done. If you are a shy person, this may not be easy for you, but it is very important.



You might want to try practicing with friends or family members if you think it will help you learn and gain more confidence in being assertive.

How you communicate with your PAs will be a big part of the success you have with them. You may become friends with your PA but it will be important for both of you to remember your roles in the working relationship. You are the supervisor.

Supervising does not mean dictating. Being assertive does not mean being aggressive or pushy. Being assertive means:

- speaking up for yourself,
- explaining your needs and
- directing your PA in a clear, patient way.

Respect and good communication between you and your PA are important and can lead to strong and lasting working relationships.

Below are some suggestions to help you to be more assertive.

- Make sure that your PA knows your expectations.
- Be fair and honest when you are dealing with your PA.
- Have respect for your PA by realizing the role this person has in your life.
- If there is a need to correct how your PA is working, address the issue calmly and as soon after the incident as possible.
- Most important – be direct when giving instructions and repeat yourself if necessary.

If this is an area of interest to you, look for additional information or a course on improving communication skills or building self-esteem.

## **Supervising Others**

Management of your PA has a lot to do with your interpersonal and communication skills (how well you communicate with other people). Talk with and treat your PA as you would like to be treated. Be clear about job duties. Be respectful when giving direction and feedback.

Feedback about performance should be specific. This applies to constructive and positive feedback. Give as much detail as possible when talking to your PA about job duties and performance.

Below are some of the basics of your role as a supervisor.

Create a positive relationship with your PA:

- Show interest in your PA
- Indicate belief (confidence) in your PA
- Explain the rules clearly
- Request that your PA follow work rules
- Explain the consequences of breaking the rules

Ask for and listen to your PA's perspective:

- Identify issues to be addressed

- Ask open-ended questions, for example, “What do you think about....?”
- LISTEN actively (give the other person your full attention, let them know you are listening by responding to what they are saying. For example, listen carefully and then say in your own words what the person said.)
- Acknowledge PA’s perspective
- Practice creative problem-solving
- Listen without letting your emotions get in the way
- Maintain focus on work-related behaviors
- Talk about options
- Ask for ideas, offer suggestions
- Offer information/ask questions about the potential impact of choices
- Think of new options
- Request actions

Identify action steps:

- Set goals and work together
- Follow plan agreed upon

Follow-up:

- Maintain awareness of and follow through on commitments
- Give positive and constructive feedback when appropriate

If this is your first experience with supervising others, you may want to find an experienced supervisor who is willing to listen to your concerns and can offer some tips of the trade. Some people find that it is easier to supervise an employee if some of the typical sticky situations have already been thought out. Things like how many times the employee can be tardy or absent and issues around trading shifts with another personal assistant. Make up your mind about these situations before they happen. Show your PA your decisions in the form of a written list or policy. Take a look in Appendix F for some ideas to get started.

## Keeping Your PA

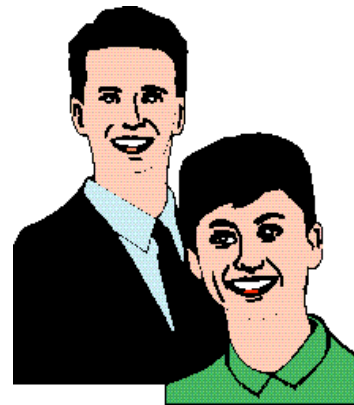
### Communication is the Key

Now that you've recruited, hired and trained your personal assistant, you will want to have a good working relationship. Keeping your newly hired PA will protect the investment of time and money you have made.

Most personal assistants who stay with the job do so because they find it personally rewarding. Good employers create a work environment that brings out the best their PAs have to offer. You will want your PA to be satisfied with his/her work and therefore, be a productive employee. Good communication between you and your PAs can help do this.

Consider these suggestions:

- Treat PAs with kindness, fairness and respect
- Know your own care needs
- Be able to offer both praise and criticism, when appropriate
- Act as independently as possible
- Keep communication open
- Talk over problems as they come up
- Avoid taking your frustrations out on your PA
- Show interest in your PA as a person



To summarize, you, as the employer, have the opportunity to provide a positive work environment for your PA. This, in turn helps him/her to be happy, productive and motivated to work for you. Good communication between the two of you is the key to a good working relationship. A PA who is happy in his/her work will stay with you longer and do a better job, which will benefit both of you.



## Resolving Conflict

Conflicts are often a natural part of establishing and building a relationship. Be prepared to deal with problems as they come up. Remember to manage your emotions so things do not get worse than they should be. Employees will usually respond in a non-threatening and positive way if their employer is fair and consistent.

If you have a conflict over duties, pay, time off, social conduct or use of property, remind your PA of your agreement. If they refuse to comply with the rules, be prepared to have them replaced.

### Solve problems using a step-by-step process

Problem-solving is a process. The same steps can be used for problems involving a broken wheelchair as for interpersonal conflicts (conflicts between people). The guide below is a formal process that involves thinking about solutions and writing down ideas. You may not need to use the whole guide to solve a problem, but it is helpful to be aware of the entire process.

#### **1. Identify the Problem**

This seems simple enough, but sometimes not everyone will agree that there is a problem. It may be a problem for your PA that your family member orders him or her around, but it may not be a problem for you.

#### **2. Define the Problem**

Define the problem without involving personalities, motives, blame and value judgments. Ask open-ended questions and use active listening to get a better understanding and definition of the problem.

Who owns the problem? What this means is, whose responsibility is it to solve this problem? Examples include:

- A broken wheelchair is your problem, but your PA and family could help you solve the problem.
- A PA who bothers you by talking too much is your problem, unless that behavior will lead to the PA losing his/her job. Then the problem belongs to both of you.

- Your PA has lost her childcare and cannot make other arrangements for a week. The problem belongs to both of you.
- Each person involved should have input, but whoever has ownership of the problem should make the final decision.



### **3. Generate Solutions**

Everyone involved should suggest solutions. Do not focus on personalities and do not criticize any suggestions. (Do not say things like: "You shouldn't be so lazy." "You shouldn't be such a jerk.") Write down every solution, no matter what it is.

### **4. Discussion and Evaluation**

Everyone involved should discuss the positives and negatives of each solution suggested. Writing out a list of the pros and cons can help in the evaluation process.

### **5. Select a Solution**

Decide on the solution that will best solve the problem.

### **6. Plan Actions**

Everyone involved should agree on who will do what, where, when, and how to solve the problem.

### **7. Evaluation of Solution**

Set a date and time to discuss whether the solution is working and revise the plan as needed. By facing problems right away, working relationships can be strengthened and improved. Working relationships that use problem solving can keep everyone working as a team and with less stress.

## Discipline – Correcting the action of employees

What is discipline? It can be a way to correct your PA's work. It can be the how you remind your PA of things they are forgetting or the way you warn your PA that a repeated habit or action is becoming a problem. Many employers use a 3-step process called progressive discipline to help employees understand that their work must be improved or corrected.

Progressive discipline is defined as an order of events used to correct the action of employees. Progressive discipline includes:

- First, a verbal warning
- Second, a written warning
- Third, job termination

Consider using the problem-solving process when a problem occurs. You can use the tips below to get started.

- **Schedule an extra appointment** with the PA. Be prepared to pay him/her for this time if necessary.
- Prior to the meeting, **write down your concerns** so that you can organize your thoughts and ensure that you don't forget what you want to address.
- **Discuss** your concerns. Be aware of your emotions and how they affect what you are trying to say. Anger, sarcasm and defensiveness will not help you explain your concerns.
- **Use "I" statements.** This shows that you are taking ownership of your own feelings, and helps the other person understand where you are coming from. For example: "I feel frustrated about your late arrival every day. It makes me anxious because I worry that I won't be on time for work." Avoid blaming, as this will put the PA immediately on the defensive.
- Let the PA have a chance to voice his/her concerns. **Listen actively** and avoid interrupting.
- **Be willing** to examine yourself and your role in the conflict.
- Come to a final agreement about the problem. **Put it in writing** so that each person leaves with the same understanding of the resolution.
- If you find that you are not able to work the problem out on your own, **seek assistance.** A supervised meeting facilitated by an outsider may be helpful in resolving the conflict.

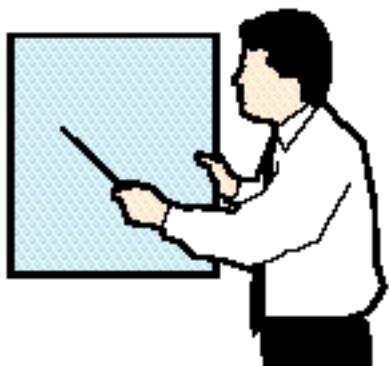
If the idea of conflict resolution is a source of concern for you consider seeking training that addresses the broader topic of communication and relationship building. Perhaps you can find a mentor who has had these experiences and is willing to share their expertise.

## Evaluating PA Job Performance

In addition to providing your PA with regular, positive, constructive feedback, it is important to formally review their job performance at least once a year. Some people suggest that a job performance review at 6 months of employment allows you the opportunity to make some adjustments as needed. Then review again at the PA's one-year anniversary of employment and yearly thereafter. Performance evaluations are a good way to keep you both on track when it comes to defining roles and responsibilities of the working relationship. It is up to you to choose when and how often to evaluate your PA's job performance.

To evaluate your PA's job performance compare your PA's actual work to the list of job duties you both agreed to when you both signed the job description.

In addition, you can:



- Review your PA's performance at the time designated for his or her evaluation; include the positive as well as areas of improvement.
- Go over the job description again and review your expectations for the PA.
- Allow the PA an opportunity to explain his or her performance.
- Evaluate the performance in writing and give a copy to your PA.

Be honest with your PA about his/her work and, if needed, give clear instruction for improvement. It's a good idea to be clear with your PA that the performance evaluation is a way for you both to work toward improved job performance, not an entitlement for a raise in pay.

Sample Job Performance Evaluation forms are included at the end of this section. You may use the forms provided or use them as a guide to create your own

.

## Terminating Employment

Terminating employment with your PA may be hard for you. It is almost never easy to fire someone. The PA may be a nice person who is just not meeting your needs. Your PA may work out for someone else or in another type of job. If there are parts of the job that s/he does well, you could offer to write a letter of reference highlighting those skills.

If it is your choice to terminate your PA's employment, you should do some advance planning if possible. You may want to have another person with you if you think the PA might be angry and you would be at risk, or dismiss him/her over the phone if possible. Have a back-up PA ready to start in case your PA gets upset and quits right away. (For some ideas about planning for back-up PAs, see Section 9.)

If your PA is just not working out (for example, personality conflicts, scheduling difficulties), you should consider giving a two-week notice if you are certain that will not put you in a risky or uncomfortable situation. This gives both you and your PA time to plan.

If your PA quits and gives notice, you should have time to find another assistant. If you are using a provider agency you can call them for help. Planning ahead of time will save you time and effort during the termination process.

You should terminate employment immediately if your PA has:

- Stolen something from you
- Been abusive physically or mentally
- Severely violated your agreement

Any actions that are against the law should also be reported to the police.

No matter how the situation arises, you will be best able to handle it if you have a step-by-step process already in place. If you have to terminate your PA's employment:

- Notify your payroll agent immediately.
- Keep written records of the event(s) and reasons for termination. This will protect you in case of a later dispute. Be careful about what you write, record the facts.

- Keep employment records for a while. Most people suggest three years.
- Have your keys and any other items that belong to you returned.

Firing doesn't just happen. With planning you can have the step-by-step process in place to handle this kind of situation yourself. Remember to talk it over with someone you trust. Sometimes just saying out loud what you're thinking helps make the decision more apparent. When you have a plan, you'll have covered all the bases, understand why you need to document your decision and who needs to know if you fire your PA. Remember you always need to let your payroll agent know.

## Job Performance Evaluation

Job Title:

Personal Assistant

PA:

\_\_\_\_\_

Employer

\_\_\_\_\_

Employer: Check the box that best describes job performance in all relevant tasks using the legend below:

**0=Unacceptable**

**1=Fair**

**2=Good**

**3=Excellent**

| PERSONAL CARE            |                          |                          |                          |                  | DOMESTIC/HOUSEHOLD       |                          |                          |                          |                       |
|--------------------------|--------------------------|--------------------------|--------------------------|------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------|
| 0                        | 1                        | 2                        | 3                        |                  | 0                        | 1                        | 2                        | 3                        |                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bathing          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Grocery Shopping      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Shaving          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Personal Shopping     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Dressing         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Meal Preparation      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Oral Hygiene     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Eating                |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transferring     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Laundry               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Sleep Schedule   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Cleaning/Housekeeping |
| HEALTH & SAFETY          |                          |                          |                          |                  | COMMUNITY                |                          |                          |                          |                       |
| 0                        | 1                        | 2                        | 3                        |                  | 0                        | 1                        | 2                        | 3                        |                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medication       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Banking               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | PT/OT            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Leisure               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Home Maintenance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Community Access      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Communication    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Religious Activities  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transportation        |

**Overall Rating of Employee's Behavior and Performance:**

0                       1                       2                       3

|                                    |
|------------------------------------|
| Employer Comments and Suggestions: |
|                                    |
|                                    |
|                                    |
|                                    |
|                                    |
|                                    |
|                                    |

We have both reviewed and discussed the above job performance ratings:

|                    |      |              |      |
|--------------------|------|--------------|------|
| Employer Signature | Date | PA Signature | Date |
|--------------------|------|--------------|------|

## Job Performance Evaluation – PA Feedback

PA: Check the box that best describes job performance in all relevant areas from the employer’s rating using the legend below:

**1=Do Not Agree**

**2= Partially Agree**

**3=Agree**

| PERSONAL CARE            |                          |                          |                | DOMESTIC/HOUSEHOLD       |                          |                          |                       |
|--------------------------|--------------------------|--------------------------|----------------|--------------------------|--------------------------|--------------------------|-----------------------|
| 1                        | 2                        | 3                        |                | 1                        | 2                        | 3                        |                       |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Bathing        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Grocery Shopping      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Shaving        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Personal Shopping     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Dressing       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Meal Preparation      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Oral Hygiene   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Eating                |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transferring   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Laundry               |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Sleep Schedule | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Cleaning/Housekeeping |

| HEALTH & SAFETY          |                          |                          |                  | COMMUNITY                |                          |                          |                      |
|--------------------------|--------------------------|--------------------------|------------------|--------------------------|--------------------------|--------------------------|----------------------|
| 1                        | 2                        | 3                        |                  | 1                        | 2                        | 3                        |                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Medication       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Banking              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | PT/OT            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Leisure              |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Home Maintenance | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Community Access     |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Communication    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Religious Activities |
|                          |                          |                          |                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Transportation       |

**PA Comments:**

Please write your comments and sign below agreeing that you have reviewed your job performance with your employer.

Note: Providing your signature is not an admission of agreeing or disagreeing with the job performance ratings given by employer.

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\_\_\_\_\_  
PA Signature

\_\_\_\_\_  
Date



## Job Performance Evaluation

**Job Title:** Personal Assistant

**PA:** \_\_\_\_\_

**Employer:** \_\_\_\_\_

Employer: Check the box that best describes job performance using the legend below:

**0=Unacceptable                      1=Fair                      2=Good                      3=Excellent**

| PERSONAL CARE            |                          |                          |                          | DOMESTIC/HOUSEHOLD       |                          |                          |                          |
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| 0                        | 1                        | 2                        | 3                        | 0                        | 1                        | 2                        | 3                        |
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| HEALTH & SAFETY          |                          |                          |                          | COMMUNITY                |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
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**Overall Rating of PA's Behavior and Performance:**

|                                    |
|------------------------------------|
| Employer Comments and Suggestions: |
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We have both reviewed and discussed the above job performance ratings:

|                    |      |              |      |
|--------------------|------|--------------|------|
| Employer Signature | Date | PA Signature | Date |
|--------------------|------|--------------|------|

## Job Performance Evaluation – PA Feedback

PA: Check the box that best describes job performance in all relevant areas from the employer’s rating using the legend below:

**1=Do Not Agree**

**2= Partially Agree**

**3=Agree**

### PERSONAL CARE

### DOMESTIC/HOUSEHOLD

| 1                        | 2                        | 3                        |       | 1                        | 2                        | 3                        |       |
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

### HEALTH & SAFETY

### COMMUNITY

| 1                        | 2                        | 3                        |       | 1                        | 2                        | 3                        |       |
|--------------------------|--------------------------|--------------------------|-------|--------------------------|--------------------------|--------------------------|-------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ |
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| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | _____ |

**PA Comments:**

Please write your comments and sign below agreeing that you have reviewed your job performance with your employer.

Note: Providing your signature is not an admission of agreeing or disagreeing with the job performance ratings given by employer.

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\_\_\_\_\_  
PA Signature

\_\_\_\_\_  
Date

## PA Job Performance Evaluation

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Evaluate:  After Training  3 Months  6 Months  Yearly

### A. Paperwork/schedule

1. Are all time sheets signed correctly?
2. Does the employee arrive when scheduled?
3. Does the employee call ASAP if there is a schedule conflict?
4. Has the employee called in sick? If so, how many days?
5. Does the employee leave on time?

Comments:

### B. Home use:

1. Does the employee follow rules concerning:
  - phone
  - car
  - computer
  - TV
  - Other electronic devices (games, VCR, etc.)
  - Kitchen privileges (foods/snacks)
2. Does the employee follow rules concerning visitors (friends/family)?
3. Does the employee show respect for the home?
4. Does the employee know the emergency plan (exits, phone numbers, etc.)?

Comments:

C. Schedule activities/social program/ medical care/ personal care

1. Does the employee follow the schedule?
2. Does the employee take an active role in participation of social program?
3. Does the employee understand the behavior plan and follow through?
4. Does the employee show interest in encouraging social language?
5. Does the employee understand medical needs of the employer and follow up care (including medical devices)?
6. Does the employee follow the personal hygiene program?

Comments:

General comments of this employee:

Any concerns or need for retraining:

---

Prepared by:

Date:

PA comments:

---

PA signature:

Date:

**A Calendar Can Be Used As a PA schedule**

| Sunday                 | Monday                | Tuesday               | Wednesday             | Thursday              | Friday                | Saturday              |
|------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|                        | 1<br>Jill:<br>6-8 am  | 2<br>Kim:<br>5-10 pm  | 3<br>Jill:<br>6-8 am  | 4<br>Kim:<br>5-10 pm  | 5<br>Jill:<br>6-8 am  | 6<br>Kim:<br>5-10 pm  |
| 7<br>Jill:<br>9-11 am  | 8<br>Jill:<br>6-8 am  | 9<br>Kim:<br>5-10 pm  | 10<br>Jill:<br>6-8 am | 11<br>Kim:<br>5-10 pm | 12<br>Jill:<br>6-8 am | 13<br>Kim:<br>5-10 pm |
| 14<br>Jill:<br>9-11 am | 15<br>Jill:<br>6-8 am | 16<br>Kim:<br>5-10 pm | 17<br>Jill:<br>6-8 am | 18<br>Kim:<br>5-10 pm | 19<br>Jill:<br>6-8 am | 20<br>Kim:<br>5-10 pm |
| 21<br>Jill:<br>9-11 am | 22<br>Jill:<br>6-8 am | 23<br>Kim:<br>5-10 pm | 24<br>Jill:<br>6-8 am | 25<br>Kim:<br>5-10 pm | 26<br>Jill:<br>6-8 am | 27<br>Kim:<br>5-10 pm |
| 28<br>Jill:<br>9-11 am | 29<br>Jill:<br>6-8 am | 30<br>Kim:<br>5-10 pm | 31<br>Jill:<br>6-8 am |                       |                       |                       |

## Section 8 Checklist

| Section 8 – Managing Your PA Checklist |   |
|--|---|
| Check here                             |   |
|  | I understand that being assertive means being direct, giving clear instructions and repeating myself if necessary.    |
|  | I read about supervising others.  |
|  | I understand that good communication between my PA and me is important for a good working relationship.               |
|  | I read the steps to the problem-solving process.  |
|  | I understand that evaluating my PA's job performance is a way for both of us to work toward improved job performance. |
|  | I read the information about terminating employment.  |
|  | I looked over the job performance evaluation forms.   |
|  | I have enough information to begin managing my PA.  |







# **SECTION 9**

## **Planning for PA Back-Up and Other Emergencies**

- Plan for the Unexpected
- Prepare a Back-Up Plan for PA Absence
- PA Names & Phone Numbers (Worksheet)
- Emergency Planning
- Emergency Information Forms
- Section 9 Checklist



## Planning for PA Back-Up and Other Emergencies

### Plan for the Unexpected

No matter how dependable your PA is, there will be times when he/she will have to miss work. You have already developed a relationship that supports the expectation that your PAs will call you in advance if they are going to be more than a few minutes late or if they are too ill to work their shift. You have established the expectation that your PA will plan vacation and leave time in advance and will not intentionally leave you without support. But life happens.

### Prepare a Back-Up Plan for PA Absence

You can prepare for an unexpected absence ahead of time by developing an emergency PA back-up system. Keep the names and phone numbers of people you can call to fill in for your PA. Back up PAs may be former PAs,



applicants who were not hired but seemed qualified, family members, and friends. You may have these people come in one or two days to familiarize them with your routine. Also, centers for independent living (CILs) can sometimes refer you to PAs.

Some employers hire more than one PA at a time. For example, Joe W. has one PA who works mornings and one who works evenings. If one PA is unable to work, the other may be able to trade shifts or fill in.

Your plan may include:

- PAs willing to work on a seasonal schedule who would be available on certain holidays or over the summer,
- PAs who work on the weekends, or
- family members who are in town for an annual event and available to assist as needed.

The important thing is for you to plan ahead.

On the next page is a worksheet titled Personal Assistant (PA) Names & Phone Numbers. You can use this worksheet to start your Back-Up Plan by listing the names and contact information of your back-up PAs. You may want to make a note of when they are most likely to be available to help you. Knowing when people can be available will help you develop a PA Back-Up Plan that will work for you.

Remember that if the reason you need a back-up PA is that your PA quit, you will need to notify your payroll agent. Additionally, your back-up PA will need to complete paperwork with your payroll agent in order to be paid.

## Personal Assistant (PA) Names & Phone Numbers

|                     |  |
|---------------------|--|
| <b>Name</b>         |  |
| <b>Address</b>      |  |
| <b>Phone</b>        |  |
| <b>Availability</b> |  |



|                     |  |
|---------------------|--|
| <b>Name</b>         |  |
| <b>Address</b>      |  |
| <b>Phone</b>        |  |
| <b>Availability</b> |  |



|                     |  |
|---------------------|--|
| <b>Name</b>         |  |
| <b>Address</b>      |  |
| <b>Phone</b>        |  |
| <b>Availability</b> |  |



Good Idea: Keep your back-up PAs names and telephone numbers where you keep your other emergency telephone numbers.

## **Emergency Planning**

Emergency planning is a good idea for everyone. Having a plan for dealing with different types of emergencies, such as medical emergencies, hospitalizations, fires, power outages, severe weather, and other natural disasters can help keep you safe and minimize any injury or damage. When planning you should:

1. Make a list of people to contact for each type of emergency.
2. Make a plan on how to contact family and PA if there is a power outage or natural disaster.
3. Make a list of medications and/or equipment that you need to take with you if you have to evacuate your home.
4. Organize medical information, emergency contact information and if applicable, living will information and place it all together in an easy to access location.
5. Store extra food and water in the case of a severe weather emergency or other natural disaster.
6. Discuss and include your PA in your emergency planning.

You may want to have these things written down and kept in a place where you and your PA know where it is at all times. Many people keep emergency information near the telephone. Make a plan that works for you. Share it with your PA during orientation and training.

On the next page is a form, Emergency Information. You can use this form or your own to organize names, phone numbers and addresses for important information you may need in an emergency such as your doctor, insurance agent, hospital, family members, friends and other medical information.

| Emergency Information |  |
|-----------------------|--|
| <b>Doctor(s)</b>      |  |
| <b>Name</b>           |  |
| <b>Address</b>        |  |
| <b>Phone</b>          |  |
|                       |  |
| <b>Dentist(s)</b>     |  |
| <b>Name</b>           |  |
| <b>Address</b>        |  |
| <b>Phone</b>          |  |
|                       |  |
| <b>Optometrist(s)</b> |  |
| <b>Name</b>           |  |
| <b>Address</b>        |  |
| <b>Phone</b>          |  |
|                       |  |
| <b>Insurance(s)</b>   |  |
| <b>Company</b>        |  |
| <b>Address</b>        |  |
| <b>Phone</b>          |  |
|                       |  |
| <b>Hospital(s)</b>    |  |
| <b>Name</b>           |  |
| <b>Address</b>        |  |
| <b>Phone</b>          |  |
|                       |  |

**Emergency Information**

**Family Member(s)**

**Name**

**Address**

**Phone**

**Family Member(s)**

**Name**

**Address**

**Phone**

**Friend(s)**

**Name**

**Address**

**Phone**

**Friend(s)**

**Name**

**Address**

**Phone**

**Medical Information:**



## Emergency Procedures

Having emergency procedures written down will help you when you train your PA. You will want to have procedures for different kinds of emergencies.

For example, what is your plan in case of a fire, a power outage or a tornado?

If there is an emergency that requires you leave your home, what are your evacuation routes and who should be called?

In the event you have an emergency related to your disability, what does your PA need to do, who should s/he call, or where should s/he take you?

Collect the information you need to plan for emergencies on the form on the following pages or use it to help you create your own. There is space to write in who to call, phone numbers and your emergency plan for several scenarios to help you think about each area that may need to be covered. If the categories listed aren't the ones you want or need, replace with your own titles and personalize the form to meet your needs.

## Emergency Procedures

### Disability Related Emergency:

**Who to Call:**

**Phone**

**Important  
Information  
and Plan**

### Non-Disability Related Emergency:

**Who to Call:**

**Phone**

**Important  
Information  
and Plan**

### Severe Weather or Natural Disaster:

**Who to Call:**

**Phone**

**Important  
Information  
and Plan**

**Power Outage:**

**Who to Call:**

**Phone**

**Important Information and Plan**

**List any Allergies:**

**Who to Call:**

**Phone**

**Important Information and Plan**

**Additional Phone Numbers**

**Police Department:**

**Fire Department:**

**Poison Control:**

**If in doubt, dial: 911**

## Section 9 Checklist

| Section 9 – Planning for PA Back-Up and Other Emergencies Checklist |   |
|---|---|
| Check here  |   |
|   | I understand that there may be times my PA will be absent with little or no notice. |
|   | I read the ideas for planning for PA back-up ahead of time.                         |
|   | I looked at the PA Names & Phone Numbers Worksheet.                                 |
|   | I think I have enough information to make my own PA back-up plan.                   |
|   | I read about the importance of planning for emergencies.                            |
|   | I looked at the forms to organize my emergency information and procedures.          |
|   | I think I have enough information to plan for an emergency.                         |





# **SECTION 10**

## **Abuse, Neglect and Exploitation**

- Defining Abuse, Neglect and Exploitation
- Keeping Yourself Safe
- Kansas Hotline Phone Numbers
- SRS Investigation of Adult Abuse
- Section 10 Checklist





## Abuse, Neglect and Exploitation

Most of the time the person who has been abused or neglected knows the person who did it (Duehn, 1990). Many women with disabilities, between 70% and 80% of all women with disabilities, will experience sexual abuse (rape or harassment) or domestic violence (being abused or neglected by a family member) in their lifetimes. Most of the time, the abuse comes from someone the person knows, such as family members or personal assistants (Duehn, 1990). Adults with a developmental disability are one and one-half times more likely to be abused than adults without a developmental disability (Sobsey, 1994).

No one likes to think about abuse and neglect, but the facts tell us they do happen. Abusive, neglectful, and exploitive behaviors are not acceptable and are against the law (Adult Protective Services Statute, H.B. 2185, effective July 1, 1998). Knowing what it means to be abused, neglected or exploited can help keep you from being a victim.

### Defining Abuse, Neglect and Exploitation

Let's start by describing abuse, neglect and exploitation.

**Abuse** is an act of aggression by one person intended to inflict harm on another person. Abuse can be when one person tries to or does hurt or harm another person on purpose.

**Neglect** is an act of omission by one person that results in harm to another person. Neglect can be when one person doesn't give a person with a disability the kind of support they have promised and the person with a disability is hurt or gets sick because of this.

**Exploitation** is when one person uses another person for one's own gain. We say that exploitation happens when one person takes advantage of another person.

There are several kinds of abuse including physical, sexual, emotional and verbal (also called psychological) abuse.

- Physical abuse means any action that causes a person to have physical pain or injury and includes but is not limited to being hit, pushed, pinched, bitten, slapped or kicked.  
For example, you fall down. Jo wants you to get up and kicks you to make you hurry. When Jo kicks you, she has physically abused you. This is wrong behavior. You have the right to not be physically abused.
- Sexual abuse includes but is not limited to rape; any unwanted sexual contact that is forced, tricked, threatened, or otherwise coerced upon another person and includes sexual harassment.  
For example, you wake up and Jim is touching your breast. Jim has no right to touch your private areas without your permission. You were asleep and did not give your permission. Jim's behavior is wrong. You have the right to not be sexually abused.
- Emotional and verbal abuse includes but is not limited to name calling, intimidation, yelling and swearing. Emotional and verbal abuse may also be called psychological abuse and includes ridicule, harassment, coercion, threats or denial of civil rights, which result in emotional injury.  
For example, you forget to take your purse with you when you go to the bank. Your id card is in your purse. You need your id card to cash your check. Jax says you're stupid to forget your purse. Jax's behavior is wrong. You have the right not to be emotionally or verbally abused.

Neglect includes, but is not limited to, the following:

- Neglect is defined as the lack of attention and due care. Neglect is the failure (whether intentional, careless or due to inadequate experience, training or skill) to provide basic care or services when agreed to by legal, contractual or otherwise assumed responsibility. Your PA failing to show up for work is neglectful behavior. Failure to

provide the appropriate care, water, food or medication is neglectful behavior.

For example, one of the job tasks your PA agreed to do is remind you to take your medication on time. If your PA does not remind you, you might miss a dose and become ill. This is neglectful behavior by your PA.

- Self-neglect – one’s inability to understand the consequences of his/her actions or inaction which leads or may lead to harm or endangerment to him or herself or other persons.

For example, self-neglect might be if you go outside in very cold weather without a coat. If you stay out for a long time, you could become too cold and get sick. This might be self-neglect.

- Abandonment – the desertion or willful forsaking of an elderly person or the withdrawal or neglect of duties and obligations owed a dependent adult by a caretaker or other person.

For example, if your PA just stops coming to work and you are unable to use the telephone to call for help, this may be considered abandonment.

Financial exploitation:

- Financial exploitation – the illegal or improper use of another person’s resources for personal profit or gain. Your PA cannot use your resources without your permission, including food, money, long distance phone calls, etc.

For example, Jess, your PA, comes to work at 5 p.m. to help you prepare your dinner. Jess always complains how hungry he is. You share your food and run out of food before payday. Jess is wrong to eat your food because he is causing you to run out of food.

## Keeping Yourself Safe

It is your right to be free from abuse, neglect and exploitation. It is also your responsibility to protect yourself at all times. There are many things you can do to help protect yourself. Start with the hiring process:

- Check the person's employment and personal references. Sometimes you may think that you know the person or the person seems like a nice person so you don't need to check the employment and personal references. You can better protect yourself if you take the reference check seriously. It's a good idea to call each of the people listed as references.
- Tell applicants that a criminal background check will be done. The report will tell you if the person has a history of abuse or neglect that has been filed with local or state officials. Your payroll agent will do the background check. Sometimes just telling an applicant that a criminal background check will be done lets them know this is not the job for them.
- Let all your PAs know that you will not tolerate abuse or neglect and if something should occur you would file charges with the police.
- Make sure your PA knows you are not isolated; you have a family and friends with whom you talk to often.
- Insist on being treated with dignity and respect.
- When a problem comes up between you and your PA, try to find a way to solve the problem right then. Don't let little problems become big problems.
- Do not minimize any situation you feel as threatening. If you feel uncomfortable or threatened in any situation, tell other people how you feel.
- Do not think the situation will go away by itself. Don't put off telling other people about a situation that is worrying you. Telling someone else can help you find a way to make the situation better.

- If you feel afraid or intimidated by your PA, tell someone else at once. You may choose to have someone with you when you fire the PA.

***You have the right to be protected from abuse. If you feel that you have been abused, neglected or exploited, contact your local SRS (Social and Rehabilitation Services) office or call this Kansas Protection Report Center in-state, toll-free number immediately:***

***1-800-922-5330***

***Every call is taken seriously.***

***Telephone lines are staffed 24 hours a day. There is someone to take your phone call at any time, day or night.***

***In the event of an emergency, contact your local law enforcement or call the police at 911.***

## **SRS Investigation of Adult Abuse**

The following is from the Kansas Department of Social and Rehabilitation Services website

([http://www.srskansas.org/KEESM/KEESM05\\_01\\_05/keesm12000.htm](http://www.srskansas.org/KEESM/KEESM05_01_05/keesm12000.htm)).

This is what the law says about what must be done if a person reports that they have been the victim of abuse, neglect or exploitation.

5. **K.S.A. 39-1430, 1431, 1432, 1433, 1436, 1437 and 1443** - Was revised by the Legislature effective July 1, 2003. Major revisions include expanding both mandated reporters and the definitions and the following:
  - a. **Investigation of Adult Abuse** - The state department of Social and Rehabilitation Services and law enforcement officers shall have the duty to receive and investigate reports of adult abuse, neglect, exploitation or fiduciary abuse for the purpose of determining whether the report is valid and whether action is

required to protect the adult from further abuse or neglect. If the department and such officers determine that no action is necessary to protect the adult but that a criminal prosecution should be considered, the department and such law enforcement officers shall make a report of the case to the appropriate law enforcement agency. K.S.A. 39 -1443.

b. **Joint Investigation** - When a report of adult neglect, adult abuse, exploitation or fiduciary abuse indicates:

- i. that there is serious physical injury to or serious deterioration or sexual abuse or exploitation of the adult; and
- ii. that action may be required to protect the adult, the investigation may be conducted as a joint effort between the Department of Social and Rehabilitation and the appropriate law enforcement agency or agencies, with a free exchange of information between such agencies. Upon completion of the investigation by the law enforcement agency, a full report shall be provided to the Department of Social and Rehabilitation Services. K.S.A. 39 -1443.

c. **Coordination of Investigations by County or District Attorney** - If a dispute develops between agencies investigating a reported case of adult abuse, neglect, exploitation or fiduciary abuse, the appropriate county or district attorney shall take charge of, direct and coordinate the investigation. K.S.A. 39 -1443.

d. **Cooperation Between Agencies** - Law enforcement agencies and the Department of Social and Rehabilitation Services shall assist each other in taking action which is necessary to protect the adult regardless of which party conducted the initial investigation. K.S.A. 39 -1443.

## Section 10 Checklist

| Section 10 – Abuse, Neglect and Exploitation Checklist |   |
|--|---|
| Check here   |   |
|  | I understand the terms abuse, neglect and exploitation.   |
|  | I read the definitions of all the kinds of abuse that may happen.                                       |
|  | I read the list of things I can do to help keep me safe.  |
|  | I know that if I feel afraid or intimidated by my PA or other people, to tell someone else immediately. |
|  | I have made a note of the toll-free hotline phone number and I know where it is.                        |
|  | I looked over the process of investigating a report of abuse.   |
|  | I have enough information to understand how to keep myself safe from abuse, neglect and exploitation.   |





# References and Resources



## References and Resources

**A Step-by-Step Guide to Training and Managing Personal Attendants, Volume 1: Consumer Guide.** (1987). G. R. Ulicny, A. B. Adler, S. E. Kennedy, & M. L. Jones. The Research & Training Center on Independent Living, University of Kansas, Lawrence, KS 66045.

Includes sample forms and checklists.

**Being An Employer: Hiring Personal Attendants.** (2004, August). Available at [www.bccpd.bc.ca/i/pdf/if/HiringPersonal/Attend.pdf](http://www.bccpd.bc.ca/i/pdf/if/HiringPersonal/Attend.pdf). This is a PowerPoint presentation developed by The British Columbia Coalition of People with Disabilities, #204-456 West Broadway, Vancouver, BC V5Y 1R3 CANADA.

Includes suggestions for writing a job description.

**Beyond Sexual Abuse: The Healing Power of Adoptive Families.** (1990). W. D. Duehn. Children's Bureau,ACYF, OHDS, U.S. Department of Health and Human Services, Washington, DC.

This article is an outgrowth of a project to develop educational materials to assist adoptive families in parenting the sexually abused child

**The Client-Employed Provider Program, The Employers' Guide.** (2002, November). Oregon Department of Human Services, 500 Summer St. NE, E13, Salem, OR 97301-1074. Available in an alternate format by calling 1-800-282-8096.

Includes a hiring check-off list, interview questions, and other information about hiring a PA along with sample forms.

**Getting from Here to There: A Manual on Personal Assistance.** (1998). C. D. Ludlum. Available from Personal Assistance Manual, A. J. Pappanikou Center, University of Connecticut, 249 Glenbrook Rd. U-64, Storrs, CT 06269-2064 for \$10. A practical guide written from years of experience with personal care assistants.

It includes information on taxes and withholding along with sample forms.

**OCCK's Self-Direct Instructional Manual.** (2004). S. Murray-Sincock. For more information contact Susan Murray-Sincock, Occupational Center of Central Kansas, Inc., Independent Connection, 1710 West Schilling Road, P.O. Box 1160, Salina, KS 67402-1160. Phone: (785) 827-9383.

This manual is a guide to assist self-direct employers with hiring and managing their Personal Assistants. The manual is in two notebooks. The first notebook is for the self-directed employer to learn about hiring and managing PAs. The

second notebook is to be used as a guide for training and as a manual for PAs. The manual includes forms to help self-direct employers evaluate their own progress.

**Personal Assistance Informational Manual: A Guide for Both Users of Personal Assistance and for Those Providing Personal Assistance.** (2005-2006, rev. ed.). Available at <http://www.southernct.edu/departments/dro/assist/PA/manual.htm>. Or write to: Disability Resource Center, Southern Connecticut State University, Engelman B 222, 501 Crescent St., New Haven, CT 06515. Phone: (203) 391-6828. E-mail: [tuckers1@southernct.edu](mailto:tuckers1@southernct.edu).

Includes personal accounts of what personal assistance support means to a person with a disability, along with hints, suggestions, and ideas for employers and PAs.

**Recruiting and Retaining Personal Assistants: A Guide for Families and People Who Self-Direct Services.** (2004, December). K. Olson, Kansas University Center on Developmental Disabilities, University of Kansas, Parsons. Available at <http://www.workforce.lsi.ku.edu/Workforce/training/selfdirectguide.html>.

Article highlights three recruitment strategies: (a) effective advertising, (b) realistic job preview, and (c) careful interviewing that can help you locate and hire the right person.

**Removing the Revolving Door.** (2001). Developed by S. O'Neill, A. Hewitt, J. Sauer, & S. Larson at the Research and Training Center, Institute of Community Integration at the University of Minnesota. Available for no additional cost to download at <http://www.qualitymall.org/products/prod1.asp?prodid=591>. Or write to: Amy Hewitt, Institute on Community Integration, University of Minnesota, 109 Pattee Hall, 150 Pillsbury Dr. SE, Minneapolis, MN 55455. Phone: (612) 624-4512. E-mail: [publications@icimail.umn.edu](mailto:publications@icimail.umn.edu). Cost is \$65 for a package that includes a Facilitator Guide and a Learner Guide. Additional Learner Guides may be photocopied or purchased for \$21 each.

A curriculum developed to train frontline supervisors and managers regarding the use of effective recruitment, retention, and training strategies of direct support professionals (DSPs). Content may also be of interest to people who hire personal assistants (PAs).

**Selecting Personal Care Assistance.** (1996, September). Rucker, Powell, & Associates, Ltd. The Kansas Council on Developmental Disabilities, Docking State Office Building, 915 S. W. Harrison, Room 141, Topeka, KS 66612-1570.

Includes suggestions from Kansans who use attendants, who coordinate attendants, and who are attendants along with sample forms.

**Tennessee Personal Assistance Supports and Services (PASS) User's Guide: A Comprehensive Guide to assist individuals in Self-Direction.** (2004). M. Taylor, PASS Project Director, The Arc of Tennessee, 44 Vantage Way, Suite 500, Nashville, TN 37228. E-mail: [mtaylor@thearctn.org](mailto:mtaylor@thearctn.org).

This Guide was used with permission to develop the Kansas Personal Assistance Supports and Services (K-PASS) Self-Direction Toolkit. Available on CD, the User's Guide is also available in both .pdf and .txt formats, along with a brochure, self-assessment, mentor's guide, self-directed services training, and mentor notes.

**Violence and Abuse in the Lives of People with Disabilities: The end of silent acceptance?** (1994). Sobsey, D. Baltimore: Paul H. Brookes Publishing Co.

This book is about the abuse of people with disabilities and measures that can be taken to prevent, or at least limit, the risk for abuse.



# **Appendix A**

## **Laws & Statutory Regulations**





## **SELF-DIRECTED PERSONAL ASSISTANCE SERVICES**

1. 1989 Session of Kansas Legislature – Passed H.B. 2012  
This law did the following:
  - Allowed individuals under the HCBS program to have the option to self-direct their personal assistance services, or to have someone direct services on their behalf.
  - Established an exemption to the nurse practice act concerning the performance of “health maintenance activities.”
  - Defined attendant care services.
  
2. 1989 session also passed H.B. 2694, which defined who could be the provider of non-medical attendant self-directed services.
  - Home Health Agencies
  - Centers for Independent Living

### **DEFINITIONS:**

Attendant Care Services means those “basic and ancillary services which enable an individual in need of in-home care to live in the individual’s home and community rather than in an institution and to carry out functions of daily living, self-care and mobility.

Basic services shall include, but not be limited to:

1. Getting in and out of bed, wheelchair or motor vehicle, or both,
2. Assistance with routine bodily functions including but not limited to:
  - Health maintenance activities;
  - Bathing and personal hygiene;
  - Dressing and grooming, and
  - Feeding, including preparation and cleanup.

Ancillary services means services ancillary to the basic services provided to an individual in need of in-home care who needs one or more of the basic services and include the following:

1. Homemaker type services, including but not limited to shopping, laundry, cleaning, and seasonal chores;
2. Companion type services, including but not limited to, transportation, letter writing, mail and escort, and

3. Assistance with cognitive tasks including but not limited to, managing finances, planning activities, and making decisions.

Health maintenance activities include but are not limited to, catheter irrigation, administration of medications, enemas and suppositories; and wound care.

There are now five separate statutes which address attendant care and self-direction. They are:

K.S.A. 65-5101

Defines who is eligible to provide self-directed services under the HCBS Waiver. It defines home health agencies and Independent Living Agencies.

K.S.A. 65-5102

This section indicates that an entity that is a home health agency may not provide services with the exception of non-medical attendant services, unless it is licensed.

K.S.A. 65-1124

This section refers to acts which are NOT prohibited by law. The most important of which is letter “m” which states that “no provisions of this law shall be construed as prohibiting performance of attendant care services directed by or on behalf of an individual in need of in-home care as the terms “attendant care services” and “individual in need of in-home care” are defined...”

K.S.A. 65-6201

This section includes the definitions described above and sets the exemption to the nurse practice act by defining health maintenance activities: includes but are not limited to, catheter irrigation, administration of medications, enemas, and suppositories; and wound care, if such activities in the opinion of the attending physician or licensed professional nurse may be performed by the individual if the individual were physically capable, and the procedure may be safely performed in the home.

K.S.A. 39-7,100

Defines HCBS services. It further sets the rights of individuals in need of in-home care who are recipients of attendant care services and the parents or guardians of minors who are at least 16 years of age and who are in need of in-home care shall have the right to choose the option to make decisions about, direct the provisions of and control the attendant care services received by such individuals including but not limited to, selecting, training, managing, paying, and dismissing of an attendant.

These bodies of law tell us three basic things:

1. What are attendant care services
2. Who can provide such services and under what conditions

### 3. What are the rights of consumers of such services

- 1) Attendant care services are defined as “basic and ancillary services which enable an individual in need on in-home care to live in an individual’s home and community rather than an institution and to carry out functions of daily living, self-care and mobility.
- 2) In the statute, “basic and ancillary services” are further defined. For purposes of this discussion, one of the types of ancillary services, “health maintenance activities”, will be highlighted. Essentially, health maintenance activities are invasive, medical or quasi-medical procedures which normally must be provided and/or supervised by licensed professionals. Kansas law exempts the licensure requirement for “performance of attendant care services directed by or on behalf of an individual in need of in-home care.”
- 3) “Recipients of attendant care services and the parents and guardians of individuals who are minors at least 16 years of age and who are in need of in-home care shall have the right to choose the option to make decisions about, direct the provisions of, and control the attendant care services received by such individuals including, but not limited to, selecting, training, managing, paying, and dismissing of an attendant.”

#### **KEY TERMS**

“right to choose...” and “including, but not limited to...”

- HCBS eligible people in Kansas have a right to control their attendant services.
- Such control must include the five elements (selecting, training, managing, paying, and dismissing of an attendant) in order to meet the statutory requirement for self-direction. These five elements are not exhaustive, but they are necessary. If any of the five are missing, then the service cannot be considered “self-directed.” Further, only “Independent Living Agencies” and certain uncertified employees of home health agencies may administer self-directed attendant services. In the case of home health agency employees, they cannot be held out as “home health aides” and cannot be nurse supervised and the minimum five conditions described above must be met in order for “self-direction” to be obtained. For both independent living agencies and home health agencies, the employer responsibilities are shared with the self-directed consumer and are limited to payroll and accounting type administrative functions.
- Other related services may or may not be provided depending on the individual agency’s programs and the desires of the consumer. Examples included assistance with background checks, assistance with recruitment, providing additional training to consumers and so on.

- Finally, self-direction is an option for people to choose. Not everyone is ready, or willing, to take on this responsibility. Traditional home health is critical for filling the gap for people who choose to remain in their own homes, but prefer professional assistance and intervention in the decision making surrounding their care.

NOTE: Medicare licensed providers probably cannot provide the self-directed option.

- Medicare requires licensure and certification, and professional supervision of all workers and services which precludes self-direction.
- An additional concern is the number of hours that an attendant can work. Attendants under the self-directed option are not independent contractors. Agencies need to be aware that hours worked in excess of forty per week are covered by wage and hour laws which mandate overtime. Allowing attendants to work more than forty hours without paying overtime exposes an agency to overtime

## House Bill No. 2012

By Special Committee on Public Health and Welfare

Re Proposal Nos. 37 and 40

12-22

*AN ACT concerning individuals in need of in-home care; defining certain terms, directing the secretary of social and rehabilitation services to perform certain duties as part of the home and community based services program; providing an exemption from the Kansas nurse practice act; amending K.S.A. 65-112 and K.S.A. 1988 Supp. 65-1124 and repealing the existing section.*

*Be it enacted by the Legislature of the State of Kansas:*

New Section 1. As used in this act:

(Now K.S.A. 65-6201, Chapter 65.—PUBLIC HEALTH, Article 62.—

MISCELLANEOUS PROVISIONS, 65-6201. Individuals in need of in-home care; definitions.)

- (a) “Attendant care services” means those basic and ancillary services which enable an individual in need of in-home care to live in the individual’s home and community rather than in an institution and to carry out functions of daily living, self-care and mobility.
- (b) “Basic services” shall include, but not be limited to:
  - (1) Getting in and out of bed, wheelchair or motor vehicle, or both;
  - (2) assistance with routine bodily functions including, but not limited to:
    - (A) health maintenance activities;
    - (B) bathing and personal hygiene;
    - (C) dressing and grooming; and
    - (D) feeding, including preparation and cleanup.
- (c) “Ancillary services” means services ancillary to the basic services provided to an individual in need of in-home care who needs one or more of the basic services, and include the following:
  - (1) Homemaker-type services, including but not limited to, shopping, laundry, cleaning and seasonal chores;

- (2) companion-type services including but not limited to, transportation, letter writing, reading mail and escort; and
- (3) assistance with cognitive tasks including, but not limited to, managing finances, planning activities and making decisions.
- (d) “Health maintenance activities” include, but are not limited to, catheter irrigation; administration of medications, enemas and suppositories; and wound care, if such activities in the opinion of the attending physician or licensed professional nurse may be performed by the individual if the individual were physically capable, and the procedure may be safely performed in the home.
- (e) “Individuals in need of in-home care” means any functionally disabled individual in need of attendant care services because of impairment who requires assistance to complete functions of daily living, self-care and mobility, including, but not limited to, those functions included in the definition of attendant care services.
- (f) “Physician” means a person licensed to practice medicine and surgery.

New Sec. 2. (a) As used in this section:

(Now K.S.A. 39-7,100, Chapter 39.—MENTALLY ILL, INCAPACITATED AND DEPENDENT PERSONS; SOCIAL WELFARE, Article 7.—SOCIAL WELFARE, 39-7,100. Home and community based services program; definitions; program requirements; demonstration projects. (a) As used in this section:)

- (1) “Home and community based services programs” mean the programs established under the state medical assistance program under plans or waivers as defined in the federal social security act in accordance with the plans or waivers adopted by the secretary of social and rehabilitation services and the secretary of aging, either separately or jointly, to provide attendant care services to individuals in need of in-home care who would require admission to an institution if the attendant care services were not otherwise provided.
- (2) “Secretary” means either the secretary of social and rehabilitation services or the secretary of aging.
  - b) The secretary as part of the home and community based services programs, subject to social security act grant requirements, shall provide that:

- (1) Priority recipients of attendant care services shall be those individuals in need of in-home care who are at the greatest risk of being placed in an institutional setting;
  - (2) individuals in need of in-home care who are recipients of attendant care services and the parents or guardians of individuals who are minors at least 16 years of age and who are in need of in-home care shall have the right to choose the option to make decisions about, direct the provisions of and control the attendant care services received by such individuals including, but not limited to, selecting, training, managing, paying and dismissing of an attendant.
  - (3) any proposals to provide attendant care services solicited by the secretary shall be selected based on service priorities developed by the secretary, except that priority shall be given to proposals that will serve those at greatest risk of being placed in an institution as determined by the secretary;
  - (4) providers, where appropriate, shall include individuals in need of in-home care in the planning, startup, delivery and administration of attendant care services and the training of personal care attendants; and
  - (5) within the limits of appropriations therefore, the home and community based services programs shall serve eligible individuals in need of in-home care throughout this state.
- (c) Within the limits of appropriations therefore, the secretary may initiate demonstration projects to test new ways of providing attendant care services and may conduct specific research into ways to best provide attendant care services in both urban and rural environments.
- (d) *On or before October 1, 1990, the secretary shall submit a written report to the governor and to the legislature, which report shall include a summary of attendant care services provided under the home and community based services program, a description of the service models utilized as part of the program, the costs by service model and units of service provided per client, client demographics and such other information as the secretary deems appropriate.*

*Sec. 3. K.S.A. 1988 Supp. 65-1124 is hereby amended to read as follows: 65-1124. No provisions of this law shall be construed as prohibiting:*

(Now K.S.A. 65-1124, Chapter 65.—PUBLIC HEALTH, Article 11.—REGULATION OF NURSING, 65-1124. Acts which are not prohibited. No provisions of this law shall be construed as prohibiting:)

- (a) Gratuitous nursing by friends or members of the family;
- (b) the incidental care of the sick by domestic servants or persons primarily employed as housekeepers;
- (c) caring for the sick in accordance with tenets and practices of any church or religious denomination which teaches reliance upon spiritual means through prayer for healing;
- (d) nursing assistance in the case of an emergency;
- (e) the practice of nursing by students as part of a clinical course offered through a school of professional or practical nursing or program of advanced registered professional nursing approved in the United States or its territories;
- (f) the practice of nursing in this state by legally qualified nurses of any of the other states as long as the engagement of any such nurse requires the nurse to accompany and care for a patient temporarily residing in this state during the period of one such engagement not to exceed six months in length, and as long as such nurses do not represent or hold themselves out as nurses licensed to practice in this state;
- (g) the practice by any nurse who is employed by the United States government or any bureau, division or agency thereof, while in the discharge of official duties;
- (h) auxiliary patient care services performed in medical care facilities, adult care homes or elsewhere by persons under the direction of a person licensed to practice medicine and surgery or a person licensed to practice dentistry or the supervision of a registered professional nurse or a licensed practical nurse;
- (i) the administration of medications to residents of adult care homes or to patients in hospital-based long-term care units, including state operated institutions for the mentally retarded, by an unlicensed person who has been certified as having satisfactorily completed a training program in medication administration approved by the secretary of health and environment and has completed the program on continuing education



adopted by the secretary, or by an unlicensed person while engaged in and as a part of such training program in medication administration;

- (j) the practice of mental health technology by licensed mental health technicians as authorized under the mental health technicians' licensure act;
- (k) performance in the school setting of nursing procedures when delegated by a licensed professional nurse in accordance with the rules and regulations of the board;
- (l) performance of attendant care services directed by or on behalf of an individual in need of in-home care as the terms "attendant care services" and "individual in need of in-home care" are defined under K.S.A. 65-6201 and amendments thereto;
- (m) performance of attendant care services directed by or on behalf of an individual in need of in-home care as the terms "attendant care service" and "individual in need of home care" are defined under section 1.

*Sec. 4 K.S.A. 65-5112 is hereby amended to read as follows: 65-5112.*

(65-5112, Chapter 65.—PUBLIC HEALTH, Article 51.—HOME HEALTH AGENCIES, 65-5112. Act not applicable to certain individuals or organizations. The provisions of this act shall not apply to:)

- (a) Individuals who personally provide one or more home health services if such persons are not under the direct control and doing work for and employed by a home health agency;
- (b) individuals performing attendant care services directed by or on behalf of an individual in need of in-home care as the terms "attendant care services" and "individual in need of in-home care" are defined under K.S.A. 65-6201, if the individuals performing such services are not under the direct control and doing work for and employed by a home health agency; or
- (c) any person or organization conducting a home health agency by and for the adherents of any recognized church or religious denomination or sect for the purpose of providing services for the care or treatment of the sick or infirm who depend upon prayer or spiritual means for healing in the practice of the religion of such church, religious denomination or sect; or

## Article 51. Home Health Agencies

**65-5101. Definitions.** As used in this act, unless the context otherwise requires:

- (b) “home health agency” means a public or private agency or organization or a subdivision or subunit of such agency or organization that provides for a fee one or more home health services at the residence of a patient but does not include local health departments which are not federally certified home health agencies, durable medical equipment companies which provide home health services by use of specialized equipment, independent living agencies, the department of social and rehabilitation services and the department of health and environment;
  
- (f) “independent living agency” means a public or private agency or organization or a subunit of such agency or organization whose primary function is to provide at least four independent living services, including independent living skills training, advocacy, peer counseling and information and referral as defined by the rehabilitation act of 1973, title VII, part B, and such agency shall be recognized by the secretary of social and rehabilitation services as an independent living agency. Such agencies include independent living centers and programs which meet the following quality assurances:
  - (1) Accreditation by a nationally recognized accrediting body such as the commission on accreditation of rehabilitation facilities; or
  - (2) receipt of grants from the state or the federal government and currently meets standards for independent living under the rehabilitation act of 1973, title VII, part B, sections (a) through (k), or comparable standards established by the state; or
  - (3) compliance with requirements established by the federal government under rehabilitation services administration standards for centers for independent living;

**65-5102. Home health agencies required to be licensed.** No home health agency, including Medicare and Medicaid providers, shall provide one or more of the home health services specified in subsection (c) of K.S.A. 65-5101 and amendments thereto, other than attendant care services, or shall hold itself out as providing one or more of such home health services, other than attendant care services, or as a home health agency unless it is licensed in accordance with the provisions of this act.

**65-1124. Acts which are not prohibited.** No provision of this law shall be construed as prohibiting:

- (m) performance of a nursing procedure by a person when that procedure is delegated by a licensed nurse, within the reasonable exercise of independent nursing judgment and is performed with reasonable skill and safety by that person under the supervision of a registered professional nurse or a licensed practical nurse;

**65-6201. Individuals in need of in-home care; definitions.** As used in this act:

- (d) “Health maintenance activities” include, but are not limited to, catheter irrigation; administration of medications, enemas and suppositories; and wound care, if such activities in the opinion of the attending physician or licensed professional nurse may be performed by the individual if the individual were physically capable, and the procedure may be safely performed in the home.

**39-7,100. Home and community based services program; definitions; program requirements; demonstration projects.** (a) As used in these sections:

- (1) “Home and community based services programs” mean the programs established under the state medical assistance program under plans or waivers as defined in the federal social security act in accordance with the plans or waivers adopted by the secretary of social and rehabilitation services and the secretary of aging, either separately or jointly, to provide attendant care services to individuals in need of in-home care who would require admission to an institution if the attendant care services were not otherwise provided.

## SESSION OF 1989

### SUPPLEMENTAL NOTE ON HOUSE BILL NO. 2012

#### As Recommended by Senate Committee on Public Health and Welfare

##### Brief

H.B. 2012, as amended by the House Committee of the Whole, creates new laws concerning individuals in need of in-home care. The bill would permit “individuals in need of care,” defined as adults who are functionally disabled because of physical impairment to receive “attendant care services,” defined as services which enable an individual to live in the individual’s home and community rather than in an institution. Attendant care services include “health maintenance activities” if such activities, in the opinion of an attending physician or a licensed professional nurse could be performed by the individual if the person were physically able to do so and the procedures may be safely performed in the home. The Kansas Nurse Practice Act is amended to exempt the performance of attendant care services from those services that the act prohibits if not provided by licensed nurses.

The bill directs the Secretary of Social and Rehabilitation Services to follow specific guidelines in operating the existing Home and Community Based Services component of the Medical Assistance program, including the right of recipients of services to make decisions about the provision of services, i.e., the right to select, train, manage, pay, and dismiss an attendant. Additionally, the Secretary, within the limits of appropriations, is authorized to initiate demonstration projects to test new ways of providing attendant care services and to conduct specific research into ways to provide such services in both urban and rural environments. The House Committee of the Whole extended the time at which the new provisions relating to the Home and Community Based Services program apply to October 1, 1989.

H.B. 2012, as amended, requires the Secretary to submit a written report to the Governor and the Legislature by October 1, 1990, summarizing services provided, client demographics, and such other information as the Secretary deems appropriate.

Finally, K.S.A. 65-2112, a section of the home health agency statutes, is amended to make it clear that persons providing attendant care services under the provisions of the bill are not to be considered to be under the direct control and employed by a home health agency.

## **Background**

H.B. 2012, as amended, was recommended by the interim Special Committee on Public Health and Welfare as a result of its study under Proposal No. 37 – In-Home Care and Services for Handicapped and Functionally Disabled Persons and Proposal No. 40 – Limitations on Delivery of In-Home Service. That Committee found, among other things, that: in-home services provide an important alternative to institutional placement that should be strengthened and expanded in Kansas; persons in need of in-home care represent various needs and desires and include disabled individuals who are physically handicapped because of injury or from birth as well as the elderly who because of disease or other condition are unable to carry out activities of daily living; the most controversial programs are those operated by the Department of Social and Rehabilitation Services as non-medical attendant care, personal care services, and medical attendant care; there is sufficient controversy over the way services are provided to require legislative action to resolve the issues; any resolution should apply to all persons who are in need of in-home services whether they receive services that are reimbursed through a governmental program, through third-party payers, or private pay; and that an exception to the scope of practice of licensed nurses should be created for the provision of in-home care that meets the standards established for attendant care services.

A number of conferees supported the provisions of H.B. 2012 as amended.



# **Appendix B**

## **Kansas Resources Directory**





## KANSAS RESOURCES DIRECTORY

### ADVOCACY

#### **Arc of Douglas County**

Lawrence, KS  
Phone: 785-749-0121  
E-mail: [thearcdc@grapevine.net](mailto:thearcdc@grapevine.net)

The mission of the Arc of Douglas County is to provide advocacy, education, and leadership to empower and support individuals with developmental disabilities and their families to live and belong in the community.

#### **Arc of Kansas**

3601 SW 29<sup>th</sup>, Suite 1625  
Topeka, KS 66604  
Phone: 785-271-8783  
E-mail: [TheArc@cjnetworks.com](mailto:TheArc@cjnetworks.com)

#### **Arc of Sedgwick County**

2919 West Second  
Wichita, KS 67203-5319  
Phone: 316-943-1191  
Fax: 316-943-3292  
E-mail: [Arc@arc-sedgwickcounty.org](mailto:Arc@arc-sedgwickcounty.org)  
Website: <http://www.arc-sedgwickcounty.org/index.html>

The Arc, (formally the Association for Retarded Citizens), is a not-for-profit agency serving individuals with developmental disabilities.

#### **InterHab**

The Resource Network for Kansans with Disabilities  
700 SW Jackson, Suite 803  
Topeka, KS 66603  
Phone: 785-235-5103  
Fax: 785-235-0020  
E-mail: [interhab@interhab.org](mailto:interhab@interhab.org)  
Website: <http://www.interhab.org>  
Executive Director, Tom Laing

Mission: InterHab is a resource network which serves its members through support, technical assistance and advocacy and, through its members, provides leadership at the local, state and national level to support people with disabilities.

**Kansas Commission on Disability Concerns (KCDC)**

Kansas Department of Commerce  
1000 SW Jackson Street, Suite 100  
Topeka, KS 66612-1354  
Phone: 785-296-6525  
Fax: 785-296-3490  
TTY (Hearing Impaired): 785-296-3487  
E-mail: [mgabehart@kansascommerce.com](mailto:mgabehart@kansascommerce.com)

The Kansas Commission on Disability Concerns (KCDC) helps individuals with disabilities achieve a higher quality of life, accomplished by providing technical assistance services, referral to appropriate entities, and training about legislative advocacy, disability etiquette and awareness, civil rights laws and accessibility.

**Self Advocate Coalition of Kansas (SACK)**

2518 Ridge Ct. #238  
Lawrence, KS 66046  
Phone: 1-888-354-7225  
E-mail: [thearcdc@idir.net](mailto:thearcdc@idir.net)  
Fax: 785-843-3728  
Website: <http://www.grapevine.net/~thearcdc/SACK/>

SACK is the statewide self-advocacy group.

**The Alliance**

6021 SW 29<sup>th</sup> St., Suite A, #324  
Topeka, KS 66614  
Phone: 785-228-9443  
Executive Director, Kathy Stiffler

The Alliance is a statewide network representing organizations providing services for people with developmental disabilities.

**AGING****Kansas Department on Aging**

New England Building  
503 S. Kansas Avenue  
Topeka, KS 66603-3404  
Phone: 785-296-4986 or 1-800-432-3535  
TTY Number: 785-291-3167  
Fax: 785-296-0256  
E-mail: [wwwmail@aging.state.ks.us](mailto:wwwmail@aging.state.ks.us)  
Website: <http://www.agingkansas.org>

The Kansas Area Agencies on Aging are grassroots' organizations built to respond to the needs in their community.

## **ASSISTIVE TECHNOLOGY**

### **Assistive Technology for Kansans Project**

2601 Gabriel  
Parsons, KS 67357  
Phone: 1-800-KAN DO IT (1-800-526-3648)  
Voice/TTD: 620-421-8367  
Fax: 620-421-0954  
E-mail: [ssack@ku.edu](mailto:ssack@ku.edu)  
Website: <http://www.atk.ku.edu>

The Assistive Technology for Kansans Project has established an Interagency Equipment Loan System (785-827-9383 or <http://www.atk.ku.edu/interagency.htm>) that contains a variety of devices that people in Kansas can borrow on a trial basis, before they purchase equipment for themselves. The Kansas Equipment Exchange (800-526-3648 or <http://www.equipmentexchange.ku.edu>) offers reconditioned durable medical equipment (DME), such as wheelchairs and lifts, available for Kansans who meet the guidelines.

## **AUTISM**

### **Autism Society of Kansas**

2250 North Rock Road #118-254  
Wichita, KS 67228  
Phone:  
May be reached through the Arc of Sedgwick County at 316-943-1191  
Website: <http://www.ask.hostrack.net/>

## **BLINDNESS AND VISUAL IMPAIRMENTS**

### **Envision**

2301 South Water  
Wichita, KS 67213  
Phone: 316-267-2244  
Fax: 316-267-4312  
E-mail: [envision@envisionus.com](mailto:envision@envisionus.com)

Envision is a private, not-for-profit agency uniquely combining employment opportunities with rehabilitation services and public education.

## **Kansas Services for the Blind and Visually Impaired**

2601 SW East Circle Drive North (1<sup>st</sup> and MacVicar)

Kansa Business and Technology Park

Topeka, KS 66606-1703

Phone: 785-296-3311 or 1-800-547-5789

Kansas Services for the Blind and Visually Impaired (KSBVI) provides people with an array of services and experiences aimed at overcoming not only the physical difficulties brought on by the loss of vision, but also the fear of change associated with vision loss. More specifically, KSBVI can help with job search and retention activities; life skills training; access to medical services; and technical assistance.

## **BRAIN INJURY**

### **Brain Injury Association**

PO Box 413072

Kansas City, MO 64141-3072

Phone: Helpline 800-783-1356

Voice: 816-842-8607

Fax: 816-842-1531

Website: <http://www.braininjuryresource.org>

The Brain Injury Association offers support services to individuals and their families throughout the state of Kansas and the greater Kansas City area who are recovering from traumatic brain injury. Our full-time [Resource Coordinator](#) networks with other social service agencies, rehabilitation programs and hospitals to provide options to many challenges these families face, including employment, medical care and counseling to assist the individual in maintaining the most independent and satisfying life possible.

## **CEREBRAL PALSY**

### **Cerebral Palsy Research Foundation of Kansas, Inc.**

5111 East 21<sup>st</sup> Street N.

Wichita, KS 67208

Phone: 316-688-1888

Fax: 316-688-5687

E-mail: [info@cprf.org](mailto:info@cprf.org)

Website: <http://www.cprf.org>

CPRF provides people with disabilities customized services, supports and technologies, with an emphasis on employment and training options, to facilitate their chosen economic and personal independence.

## **DEAFNESS AND HEARING IMPAIRMENTS**

### **Kansas Commission for the Deaf and Hard of Hearing**

3640 Southwest Topeka Boulevard, Suite 150

Voice/TTY: 785-267-6100 or 1-800-432-0698

Fax: 785-267-0655

Website: <http://www.srskansas.org/kcdhh/>

The KCDHH is a state agency authorized to develop and implement a program of information and referral; advocacy; public education; and direct services.

### **Kansas School for the Deaf**

450 E. Park Street

Olathe, KS 66061

Phone: 913-791-0573

Fax: 913-791-0577

Website: <http://ksdeaf.org>

Mission: Total accessibility to language and educational excellence in a visual environment

### **Kansas State School for the Blind**

1100 State Avenue

Kansas City, KS 66102

Phone: 913-281-3308

Fax: 913-281-3104

The mission of the Kansas State School for the Blind (KSSB) is to empower students with the knowledge, attitudes, and skills to assume responsible roles in society and to lead fulfilling lives. KSSB will be the statewide leader in establishing partnerships with parents, school districts, and community resources to promote access to a high quality education for all Kansas students with visual impairments, regardless of where they attend school.

## **DEVELOPMENTAL DISABILITIES**

### **Cerebral Palsy Research Foundation (CPRF)**

P.O. Box 8217

5111 East 21<sup>st</sup> Street

Wichita, KS 67208

Phone: 316-688-1888

Fax: 316-688-5687

E-mail: [info@cprf.org](mailto:info@cprf.org)

Providing people with disabilities customized services, supports and technologies, with an emphasis on employment and training options, to facilitate their chosen economic and personal independence since 1972.

### **Community Developmental Disability Organizations (CDDOs)**

CDDOs are the single point of entry for an individual or family to obtain services through the developmental disabilities system in the State of Kansas. Kansas currently has 27 CDDOs, each are assigned a particular county or counties in which they are the primary provider of “gatekeeping” services. See the list below. For further information about CDDOs and community service providers in Kansas (CSPs) please visit the Kansas Department of Social and Rehabilitation Services website at <http://www.srskansas.org/hcp/css/CDDO.htm>. Select “Interactive CDDO & CSP Map” to access organization contact information.

#### **Achievement Services for Northeast KS**

215 North 5th  
P.O. Box 186  
Atchison, KS 66002  
Phone: 913-367-2432  
Fax: 913-367-0370  
Gerald T. Henry, Director

#### **Arrowhead West, Inc.**

1100 E. Wyatt Earp  
P.O. Box 1417  
Dodge City, KS 67801  
Phone: 620-227-8803  
Fax: 620-227-8812  
Lori Pendergast, Director

#### **Big Lakes Developmental Center**

1416 Hayes Drive  
Manhattan, KS 66502  
Phone: 785-776-9201  
Fax: 785-776-9830  
Lori Feldkamp, Pres. CEO

#### **Brown County Developmental Services, Inc.**

400 S. 12th  
Hiawatha, KS 66434  
Phone: 785-742-3959  
Fax: 785-742-3834  
Linda L. Lock, Director

**Class, LTD.**

1200 E. Merle Evans Drive  
P.O. Box 266  
Columbus, KS 66725  
Phone: 620-429-1212  
Fax: 620-429-1231  
Jan Bolin, Director

**COF Training Services, Inc.**

1516 Davis Road  
Box 459  
Ottawa, KS 66067-0459  
Phone: 785-242-5035  
Fax: 785-242-2118  
Dan L. Andrews, Director

**Cottonwood, Inc.**

2801 W. 31st Street  
Lawrence, KS 66047  
Phone: 785-842-0550  
Fax: 785-842-6102  
Sharon Spratt, Director

**Cowley Co. Developmental Services, Inc.**

114 W. 5th Ave., Suite 301  
P.O. Box 618  
Arkansas City, KS 67005-0618  
Phone: 620-442-5270  
Fax: 620-442-5623  
William P. Brooks, Exec. Director

**Developmental Svcs. of NW KS, Inc.**

2703 Hall St.  
P.O. Box 1016  
Hays, KS 67601  
Phone: 785-625-5678  
Fax: 785-625-8204  
Gerard L. Michaud, Executive Director

**Disability Planning Organization of Kansas, Inc.**

1710 W. Schilling Road  
P.O. Box 1160  
Salina, KS 67402-1160  
Phone: 785-827-9383  
Fax: 785-823-2015  
Carolee Miner, President/CEO

**Flinthills Services, Inc.**

2375 W. Central  
El Dorado, KS 67042  
Phone: 316-321-2325  
Fax: 316-321-5032  
Dana Korkki, Interim Executive Director

**Futures Unlimited, Inc.**

2410 North A  
Wellington, KS 67152  
Phone: 620-326-8906  
Fax: 620-326-7796  
Thomas Kohmetscher, Director

**Hetlinger Developmental Services, Inc.**

707 South Commercial  
P.O. Box 2204  
Emporia, KS 66801  
Phone: 620-342-1087  
Fax: 620-342-0558  
Trudy Hutchinson, Executive Director

**Johnson County Developmental Supports**

10501 Lackman Road  
Lenexa, KS 66219-1223  
Phone: 913-826-2626  
Fax: 913-826-2627  
Gary Blumenthal, Executive Director

**Multi Community Diversified Services, Inc.**

2107 Industrial Drive  
McPherson, KS 67460-2841  
Phone: 620-241-6693  
Fax: 620-241-6699  
Sherry Plenert, Acting CEO

**Nemaha County Training Center**

12 South 11th  
Seneca, KS 66538  
Phone: 785-336-6116  
Fax: 785-336-2634  
Alice Lackey, Director

**New Beginnings Enterprises, Inc.**

1001 Wilson  
P.O. Box 344  
Nedgesha, KS 66757



Phone: 620-325-3333  
Fax: 620-325-3899  
Anna Silva-Keith, President/CEO

**Northview Developmental Services, Inc.**

700 E. 14th St.  
Newton, KS 67114  
Phone: 316-283-5170  
Fax: 316-283-5196  
David Powell, Interim Director

**Reno County**

1300 East A  
P.O. Box 399  
Hutchinson, KS 67504-0399  
Phone: 620-663-1596  
Fax: 620-663-1293  
Brenda Maxey, Pres./CEO

**Riverside Resources, Inc.**

700 North 3rd St.  
Leavenworth, KS 66048  
Phone: 913-651-6810  
FAX: 913-651-6814  
Karen Baker, Director

**Sedgwick County Developmental Disability Organization**

615 N. Main  
Wichita, KS 67203  
Phone: 316-660-7630  
Fax: 316-660-4894  
Colin McKenney, Exec. Director

**Shawnee County CDDO**

2701 SW Randolph Ave.  
Topeka, KS 66611  
Phone: 785-232-5083  
Fax: 785-232-3770  
Ramona Macek, Director

**Southwest Developmental Services, Inc.**

1808 Palace Drive, Suite C  
Garden City, KS 67846  
Phone: 620-275-7521  
Fax: 620-275-1792  
Mark Hinde, Director

**Tri-Ko, Inc.**  
301 First St.  
Osawatomie, KS 66064  
Phone: 913-755-3025  
Fax: 913-755-4981  
Dennis Norton, Director

**Tri-Valley Developmental Services, Inc.**  
3740 S. Santa Fe  
P.O. Box 518  
Chanute, KS 66720  
Phone: 620-431-7401  
Fax: 620-431-1409  
Maury Thompson, Director

**Twin Valley Developmental Services, Inc.**  
427 Commercial  
P.O. Box 42  
Greenleaf, KS 66943  
Phone: 785-747-2251  
Fax: 785-747-2424  
Edgar C. Henry, Director

**Wyandotte County Developmental Disabilities Organization**  
701 North 7th St., Room 505  
Kansas City, KS 66101  
Phone: 913-573-5460  
Fax: 913-573-5473  
Gordon Criswell, Director

**Community Supports and Services (CSS)**  
**The Kansas Department of Social and Rehabilitation Services (SRS)**  
Docking State Office Building  
915 SW Harrison St.  
Topeka, KS 66612  
Phone: 785-296-3959  
Fax: 785-296-2173  
Website: <http://www.srskansas.org>

Oversight of community-based services for persons with disabilities is mostly the responsibility of the SRS. The Community Supports and Services Division (CSS) of SRS manages a system of community-based supports and services for persons with disabilities. The goal of CSS is to provide resources and processes to assist Kansans with disabilities.

### **Down Syndrome Guild of Greater Kansas City**

10200 W. 75<sup>th</sup> Street

Suite 281

Shawnee Mission, KS 66204

Phone: 913-384-4848

Fax: 913-384-4949

24-hour Phone Information Line: (913) 384-9898

Website: <http://www.kcdsg.org/ContactUs.php>

### **Kansas Council On Developmental Disabilities (KCDD)**

Topeka, KS

For more information, e-mail Jane Rhys, Ph.D., Executive Director, KCDD,  
[jrhys@alltel.net](mailto:jrhys@alltel.net)

Website: <http://www.nekesc.org/kcdd.html>

“To ensure the opportunity to make choices regarding participation in society and quality of life for individuals with developmental disabilities”

## **EPILEPSY**

### **Epilepsy Foundation Kansas & Western Missouri**

6550 Troost Avenue, Suite B

Kansas City, MO 64131-1266

Phone: 816-444-2800 or 800- 972-5163

The Epilepsy Foundation of Kansas and Western Missouri provides education, advocacy and services for people affected by epilepsy or other seizure disorders. The organization was created to put an end to the myths and misunderstandings about epilepsy while helping individuals with epilepsy to improve their quality of life.

## **FINANCIAL INFORMATION**

### **Kansas Division of Workers Compensation**

Kansas Department of Labor

800 SW Jackson, Suite 600

Topeka, KS 66612-1227

Phone: 785-296-2996

E-mail: [anita.ramirez@dol.ks.gov](mailto:anita.ramirez@dol.ks.gov)

Website: [http://www.dol.ks.gov/WC/HTML/wc\\_ALL.html](http://www.dol.ks.gov/WC/HTML/wc_ALL.html)

## **HOUSING**

### **The Topeka Housing Authority**

2010 SE California

Topeka, KS 66607

Phone: 785-357-8842  
Fax: 785-357-2648  
Website: <http://www.tha.gov/>

Mission: To successfully provide accessible affordable housing. Success is defined as: putting applicants, tenants and participants first; market competitiveness; and fiscal strength and integrity.

For more information about other Housing Authorities in Kansas, please check out this website.

**Housing Authorities on the Web: Kansas**  
<http://www.hud.gov/local/ks/renting/hawebsites.cfm>

## **INDEPENDENT LIVING**

**Kansas Association of Centers for Independent Living (KACIL)**  
214 SW 6<sup>th</sup> Street, Suite A  
Topeka, KS 66603  
Phone: 785-215-8048  
Fax: 785-215-8050  
Website: <http://www.kacil.org>  
Executive Director: Jennifer Schwartz

KACIL represents 12 Centers for Independent Living (CILs). Centers provide services to people with disabilities of all ages. Centers for Independent Living also provide assistance to businesses and all other entities in the community to assist them in offering services to people with disabilities. We advocate at a state and national level for the rights of all people with disabilities to live in the communities of their choice.

The Kansas Association of Centers for Independent Living (KACIL) represents 12 Centers for Independent Living (CILs). Centers provide services to people with disabilities of all ages. For more information visit KACIL's website at <http://www.kacil.org>.

## **Kansas Centers for Independent Living**

**Center for Independent Living for Southwest Kansas**  
111 Grant Ave.  
Garden City, KS 67846  
620-276-1900 (V/TDD)  
620-271-0200 (FAX)  
1-800-736-9443  
Troy Horton, Executive Director [Cilswks1@gcnet.com](mailto:Cilswks1@gcnet.com)

**Coalition for Independence**

4911 State Ave.  
Kansas City, KS 66102  
913-321-5140 (V)  
913-321-5216 (TDD)  
913-321-5182 (FAX)  
1-866-201-3829  
Clark Byron, Executive Director [cbyron@cfi-kc.org](mailto:cbyron@cfi-kc.org)

**Independence Inc.**

2001 Haskell  
785-841-0333 (V)  
785-841-1046 (TDD)  
785-841-1094 (FAX)  
1-888-824-7277  
Executive Director, Tanya Dorf [tanyad@independenceinc.org](mailto:tanyad@independenceinc.org)

**Independent Connection/ OCCK**

1710 W. Schilling Rd.  
Salina, KS 67401  
785-827-9383 (V/TDD)  
785-823-2015 (FAX)  
1-800-526-9731  
Shelia Nelson-Stout, Executive Director [nelsonsh@occk.com](mailto:nelsonsh@occk.com)

**Independent Living Center of Northeast Kansas**

521 Commercial, Suite C  
Atchison, KS 66002  
913-367-1830 (V/TDD)  
913-367-1430 (FAX)  
1-888-845-2879  
Ken Gifford, Executive Director [kgifford@ilcnek.org](mailto:kgifford@ilcnek.org)

**Independent Living Resource Center**

3033 W. 2nd  
Wichita, KS 67203  
316-942-6300 (V/TDD)  
316-942-6861 (FAX)  
1-800-479-6861  
Judy Weigel, Executive Director [jweigel@ilrcks.org](mailto:jweigel@ilrcks.org)

**LINK**

2401 E. 13th  
Hays, KS 67601  
785-625-6942 (V/TDD)  
785-625-2334 (FAX)

1-800-569-5926  
Brian Atwell, Executive Director [brianatwell@eaglecom.net](mailto:brianatwell@eaglecom.net)

**Prairie Independent Living**

17 S. Main  
Hutchinson, KS 67501  
620-663-3989 (V)  
620-663-9920 (TDD)  
620-663-4711 (FAX)  
1-888-715-6818  
Chris Owen, Executive Director [cowens\\_pilr@sbcglobal.net](mailto:cowens_pilr@sbcglobal.net)

**Resource Center for Independent Living**

P.O. Box 257  
1137 Laing St.  
Osage City, KS 66523  
785-528-3105 (V)  
785-528-3106 (TDD)  
785-528-3665 (FAX)  
1-800-580-7245

**Southeast Kansas Independent Living**

P.O. Box 957  
1801 Main Street  
Parsons, KS 67357  
620-421-5502 (V)  
620-421-6551 (TDD)  
620-421-3705 (FAX)  
1-800-688-5616  
Shari Coatney, Executive Director [sharic@skilonline.com](mailto:sharic@skilonline.com)

**The Whole Person**

301 E. Armour Blvd.  
Kansas City, MO 64111  
816-561-0304 (V)  
816-931-2202 (TDD)  
816-753-8163 (FAX)  
David Robinson, Executive Director [drobenson@thewholeperson.org](mailto:drobenson@thewholeperson.org)

**Three Rivers**

PO Box 408  
408 Lincoln Ave.  
Wamego, KS 66547  
785-456-9915 (V/TDD)  
785-456-9923 (FAX)  
1-800-555-3994

Audrey Schremmer-Phillip, Executive Director [Audrey@threeriversinc.org](mailto:Audrey@threeriversinc.org)

**Topeka Independent Living Resource Center**

501 S.W. Jackson, #100

Topeka, KS 66603

785-233-4572 (V/TDD)

785-233-1561 (FAX)

1-800-443-2207

Mike Oxford, Executive Director [tilrc@tilrc.org](mailto:tilrc@tilrc.org)

**SILCK**

**Statewide Independent Living Council of Kansas**

700 SW Jackson Street, Suite 212

Topeka, KS 66603-3758

Phone: 785-234-6990 (Voice/TDD)

Fax: 785-234-6651

Executive Director: Shannon Jones

The vision of the State Plan for independent living in Kansas is an inclusive community that would enable Kansans to live in the environment of their choice.

**LEGAL RIGHTS**

**The Disability Rights Center of Kansas (DRC)**

635 SW Harrison Street, Suite 100

Topeka, KS 66603-3726

Voice: 785-273-9661

Toll free voice: 1-877-776-1541

Toll free TDD: 1-877-335-3725

Fax: 785-273-9414

E-mail: [info@drckansas.org](mailto:info@drckansas.org)

Website: <http://drckansas.org/default.htm>

The Disability Rights Center of Kansas (DRC), formerly Kansas Advocacy & Protective Services (KAPS), is a public interest advocacy agency empowered by federal law to advocate for the civil and legal rights of Kansans with disabilities.

**Kansas Legal Services**

1315 SW Arrowhead Road

Topeka, KS 66604

Phone: 785-354-8531

Fax: 785-233-2096

Website: <http://www.kansaslegalservices.org>

To provide equal access to justice for all persons not able to pay for legal and other essentials.

## **MENTAL ILLNESS**

### **Association of Community Mental Health Centers of Kansas, Inc.**

720 SW Jackson  
Topeka, KS 66603  
Phone: 785-234-4773  
Fax: 785-234-3189

The Association of Community Mental Health Centers of Kansas, Inc. advances the interest of CMHCs and the individuals they serve. Towards this end, the Association provides legislative representation, offers leadership and professional education, highlights model practices and programs, and identifies resources for addressing the challenges faced by local mental health authorities.

## **TRANSPORTATION**

### **Lawrence Transit System**

Website: <http://www.lawrencetransit.org/guide>

The city's public transportation system operates eight fixed routes and offers complimentary paratransit service to those individuals certified as eligible.

## **VOCATIONAL REHABILITATION**

### **Vocational Rehabilitation Services (VR)**

Kansas Department of Social and Rehabilitation Services  
915 SW Harrison Street  
Topeka, KS 66612  
Phone: 785-296-3959  
Fax: 785-296-2173  
TTY Number 785-296-1491  
Website: <http://www.srskansas.org/rehab/text/VR.htm>

The VR program emphasizes community-based services, integration and consumer choice. VR counselors work in partnership with people with disabilities to help them assess their skills and interests, to develop individualized plans for employment, and to purchase or arrange for the services they need to become employed. Services are individualized according to each person's disability, strengths, interests, skills, goals and informed choice.



Services may include counseling and guidance; physical and mental restoration; training; rehabilitation technology; and job placement.



# **Appendix C**

## **Job Description Development Tool**



# **KANSAS**

**Personal Assistance  
Supports and Services  
(K-PASS)**

## **Job Description Development Tool**

A Needs Self-Assessment Tool for  
Consumers Who Self-Direct



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## **Introduction**

To make sure that you employ the right personal assistant (PA) for you, it is important that you know what all of your personal needs are, and how a PA can help you. We have included this self-assessment tool, the Job Description Development Tool, to assist you in identifying these needs.

Completing a self-assessment is one way to determine your needs. The information provided will give you the tools necessary to develop a job description, to screen and interview potential employees and to train your new PA. This assessment will help you address your physical needs as well as your leisure and community needs.

Remember, when completing this self-assessment, think about having all of your needs met. You may be living in a situation now that is not your ideal. You may have gotten used to it, or have learned to compensate for any lack in services. Completing this self-assessment can help put you on track when hiring a PA. Keep in mind the impact that hiring a PA will have on your life. When you think about your needs, consider all of them. Think about the things you have been living without, but could have with the help of a PA.

The self-assessment will ask about Assistive Technology (AT) in each area of daily living. We have done this to encourage you to think about having an evaluation done or to utilize AT that can help you live more independently. In Kansas, you can call 800-526-3648 to reach your local AT Access Site for help in determining your AT needs.



**BANKING**

If you need help with your personal banking, these questions will help you think about the kind of help you may want or need. It is very important to remember to be careful about sharing too much personal information with anyone. Be sure your PA understands and upholds your confidentiality agreement.

**Consider these issues:**

|   | <u>YES</u>               | <u>NO</u>                |
|---|--------------------------|--------------------------|
| Do you need help with your banking needs? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need your PA to bring you to the bank? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need physical assistance while in the bank? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need physical assistance writing out your bills? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need assistance in paying your bills? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you use or would you like to use AT devices to do your banking? For example: | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

- CCTV for reading your bill
- Check printer
- Online access for paying bills

**Other Considerations:**

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## BATHING

Bathing is very personal and some people with disabilities are not able to complete bathing activities without help. These questions will help you think about what kind of help you may want or need. It is very important for your PA to understand what you are comfortable with and what you are not comfortable with. Your PA should respect your privacy and help you maintain a comfortable level of modesty.

Think carefully about what your needs are, then decide how you want your PA to help you. This is a very personal part of your life so consider what makes you the most comfortable. Be sure to be very specific about what you want and don't want when you explain your bathing needs to your PA

**Consider these issues:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Do you need help bathing?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>  |                          |                          |
| Do you bathe every day?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use the shower?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use the bathtub?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you prefer a bed bath?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help washing your body?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Some individuals use a washcloth or a towel to cover private areas when bathing Do you prefer to have private areas of your body covered with a washcloth or hand towel when you receive help bathing? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you wash any parts of your body by yourself?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with skin care treatments?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help transferring?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help washing your hair?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help drying your body?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help drying your hair?   | <input type="checkbox"/> | <input type="checkbox"/> |



## CLEANING/HOUSEKEEPING

PA services are usually restricted to personal and physical care, but household cleanliness may also be part of the job description. Tell your PA what kind of help you need and what you expect. Also, talk with your PA about how often you would like each task done.

**Consider these issues:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help cleaning your house?                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b> - would you like your PA to help you with: |                          |                          |
| Dusting?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Vacuuming?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Sweeping and mopping floors?                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Washing dishes?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Drying dishes?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning counter tops?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning outside of stove?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning oven?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning inside/outside of refrigerator?                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning bathroom floors and walls?                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning sink, tub, toilet?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning windows?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleaning ceiling fans?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Gathering and taking out trash? Note day trash is picked up.     | <input type="checkbox"/> | <input type="checkbox"/> |
| Changing bed linens?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use or would you like to use AT devices?                  | <input type="checkbox"/> | <input type="checkbox"/> |



## COMMUNICATION

It is very important for there to be good communication between you and your PA. These questions will help you think about your ability to communicate and if you need help expressing yourself.

### **Consider these issues:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Are you able to express yourself verbally and be clearly understood by others? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you understand what people are saying to you?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If no,</b><br>Do you use sign language?                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you read sign language?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use gestures with some speech?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need things explained to you?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use a communication device?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need a communication device?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help maintaining and programming a communication device?           | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use hearing aids?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need someone to clean and check the batteries of your hearing aids?     | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use an adapted telephone?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need someone to reprogram your adapted telephone periodically?          | <input type="checkbox"/> | <input type="checkbox"/> |
| Can you have a PA who is deaf?   | <input type="checkbox"/> | <input type="checkbox"/> |

### **Other Considerations:**

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## COMMUNITY ACCESS

If you need help in the community, these questions will help you think about the kind of help you may want or need. Your PA could help you maneuver into or out of a building, get through doors, turn corners or sit at a table. Think about anything special you may want or need that will help you access your community.

**Issues to consider:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help scheduling or canceling appointments?             | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need physical help getting into a building?                 | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>If yes,</b><br>Do you need help once you are inside a building? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use a service dog?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need your PA to give you verbal cues?                       | <input type="checkbox"/> | <input type="checkbox"/> |

Please explain any kind of help you need in order to access your community:

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**Other Considerations:**

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## DRESSING

Getting dressed is a very important part of your day. These questions will help you think about what kind of help you may want or need. If you need help getting dressed, think about how a PA can help you. Is there any type of equipment you use to help you get dressed? Are you modest?

The way you look is important to you. Depending on how much help you may want or need, a PA may be the person responsible for how you look when you leave your house. Therefore, you will want to be sure any potential employees will respect your desires and share in your feelings.

### **Consider these issues:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Do you need help getting dressed?  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>  |                          |                          |
| Do you need help picking out your clothes?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on undergarments?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on pants/skirts?                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on a necktie or a scarf?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on socks?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on stockings?                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on shoes?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on a watch or jewelry?                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help putting on make-up?                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use or would you like to use AT devices or dressing aids such as: | <input type="checkbox"/> | <input type="checkbox"/> |
| • Zipper pull  |                          |                          |
| • Button hook  |                          |                          |
| • Extended handle to pull button hook                                    |                          |                          |
| • Sock aid   |                          |                          |
| • Elastic shoelaces or Velcro shoes                                      |                          |                          |

### **Other Considerations:**

# EATING

If you need help feeding yourself, the following questions will help you think about your eating needs. When you train your PA, remember to talk about what you like and do not like. Think about utensils, meal times, bite sizes and any other issues that may be involved in helping you to eat.

**Issues to consider:**

|                               | <u>YES</u>               | <u>NO</u>                |
|-------------------------------|--------------------------|--------------------------|
| Do you need help with eating? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|                                     |                          |                          |
|-------------------------------------|--------------------------|--------------------------|
| Do you need help cutting your food? | <input type="checkbox"/> | <input type="checkbox"/> |
|-------------------------------------|--------------------------|--------------------------|

|                                  |                          |                          |
|----------------------------------|--------------------------|--------------------------|
| Do you need your PA to feed you? | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------------------------|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need your PA to position your glass, plate and utensils? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|                            |                          |                          |
|----------------------------|--------------------------|--------------------------|
| Are you on a special diet? | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------------------|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you use an assistive device to feed yourself? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

For example,

- Utensil with an adapted handle
- Weighted utensil
- Rocker knife
- Rimmed plate
- Flexible straw
- Electronic feeding machine

**Other Considerations:**

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## GROCERY SHOPPING

You may be able to enjoy grocery shopping on your own. If not, a PA will be able to help you. These questions will help you think about what kind of help you may want or need when you are grocery shopping.

**Issues to consider:**

|                                    | <u>YES</u>               | <u>NO</u>                |
|------------------------------------|--------------------------|--------------------------|
| Do you need help grocery shopping? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to write the grocery list? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to keep an inventory list of food and supplies you need? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to go with you to the grocery store? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you want your PA to do your grocery shopping for you? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|                                      |                          |                          |
|--------------------------------------|--------------------------|--------------------------|
| Do you need your PA to clip coupons? | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------------------|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Will you need help to pay at the register? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you use or would you like to use AT devices to help you shop?<br>For example, | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

- Bill reader
- Electronic picture grocery list
- Calculator to track your purchases

**Other Considerations:**

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|                         |
|-------------------------|
| <b>HOME MAINTENANCE</b> |
|-------------------------|

Home is where we all feel most comfortable. Part of being comfortable means that everything is taken care of. Of course, we want our homes to be clean and for the yard to look nice, but we also want to be safe. These questions will help you think about what kind and how much help you may want or need to take care of the things around your home.

**Issues to consider:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help with your home maintenance? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to mow the yard?                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help raking your leaves?                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help shoveling your walk or driveway?                | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with flower gardens?                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with potted plants?                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help maintaining your water softener?                | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need your PA to replace the batteries in smoke detectors? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need your PA to replace light bulbs?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need your PA to clean/replace A/C or furnace filters?     | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have an emergency generator?                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Will your PA need to operate it if necessary?                    | <input type="checkbox"/> | <input type="checkbox"/> |

**Other Considerations:**

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## LAUNDRY

If you need help doing your laundry talk with your PA about how to care for each item and type of clothing you have. Which items do you like dried in the dryer and which ones do you like to hang dry? Tell your PA the wash cycles you use for different types of laundry. Show your PA how you would like them to sort your clothes so colors will not run.

**Issues to consider:**

|                                      | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--------------------------------------|--------------------------|--------------------------|
| Do you need help doing your laundry? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to do the laundry for you? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need help sorting your laundry? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help washing/drying your laundry? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help cleaning your lint filter? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need help folding your laundry? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help putting your laundry away? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|                                |                          |                          |
|--------------------------------|--------------------------|--------------------------|
| Do you need help with ironing? | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------------|--------------------------|--------------------------|

|                                    |                          |                          |
|------------------------------------|--------------------------|--------------------------|
| Do you need any items hand washed? | <input type="checkbox"/> | <input type="checkbox"/> |
|------------------------------------|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need any clothes taken to the dry cleaner? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help having clothes sewn or mended? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you use or would you like to use AT devices or strategies? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

For example:

- Color coded setting
- Picture symbols

**Other Considerations:**

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## LEISURE ACTIVITIES

If you need your PA to help you participate in leisure activities, talk with them during the interview about the things they like to do. It may be important for you to hire a PA who has similar interests. That way, both of you will enjoy all the activities you wish to do.

### **Issues to consider:**

What kind of things do you like to do for fun?

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Describe the kind of help you may want or need in order to do the things you enjoy.

- Is one of your favorite activities watching TV?
- Do you need help operating your TV?
- Do you like going to the movies, restaurants, etc.?
- Do you prefer to go fishing, horseback riding, bowling or bird watching?

Do you use or would you like to use AT devices for leisure activities? For example:

- Adapted fishing rod
- Switch on a camera
- Preprogrammed TV schedule to record
- Controller mounted on your chair for video games
- Adapted saddle

Describe how a PA could help you with any part of the activities you want to do.

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## MEAL PREPARATION

If you want your PA to prepare meals, talk about the kinds of food you like, and the way you like them fixed. If you will be sharing food with a live-in PA, be sure to talk about whether they should share in the cost or if you plan to include it as part of their compensation. You may also want to talk about preparing meals together, special diets and any possible limits on use of the kitchen.

**Issues to consider:**

|                                   | <u>YES</u>               | <u>NO</u>                |
|-----------------------------------|--------------------------|--------------------------|
| Do you need help preparing meals? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|                           |                          |                          |
|---------------------------|--------------------------|--------------------------|
| Will you plan your meals? | <input type="checkbox"/> | <input type="checkbox"/> |
|---------------------------|--------------------------|--------------------------|

|                                       |                          |                          |
|---------------------------------------|--------------------------|--------------------------|
| Do you want help planning your meals? | <input type="checkbox"/> | <input type="checkbox"/> |
|---------------------------------------|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need help preparing your meals? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to prepare all your meals for you? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you want your PA to prepare meals and put them in the refrigerator or freezer for later use? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you use or would you like to use AT devices to prepare meals? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

For example:

- Rocker knife
- Mini-food processor/chopper
- Adapted spatula
- Color coded burners and knobs
- Digital timer
- Lightweight unbreakable bowls
- Lower work surface

**Other Considerations:**

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## MEDICATION

If you need help taking your medicine, be clear about how much help and what kind of help you need. For example, if your medicine is in a cabinet, do you need it taken out for you? Do you need help organizing your medicines? Do you need help remembering when to take them? Do you need someone to pick up your medicines from the pharmacy? Be sure to tell your PA if you are allergic to any medicines or if there is anything to watch out for.

**Consider these issues:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help with your medicine?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>  |                          |                          |
| Do you take medicine every day?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help taking your medicine?<br>For example, put your medicine in your hand or have help with a drink. | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help organizing your medicine in a pillbox?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help remembering when to take them?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need someone to pick up your medicine from the pharmacy?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there anything to watch out for that your PA should know?<br>For example, are you allergic to any medicines?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use or would you like to use AT to maintain your medicine schedule?                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, do you need help programming or filling your device?   | <input type="checkbox"/> | <input type="checkbox"/> |
| If not, have you considered:   |                          |                          |
| • a memory reminder to take your medicine on time  | <input type="checkbox"/> | <input type="checkbox"/> |
| • an automatic pill dispenser that gives you the right amount of medicine  | <input type="checkbox"/> | <input type="checkbox"/> |

**Other Considerations:**

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**GENERAL THERAPY**

If you go to PT, OT or other therapists, you may want to think about having your PA help you with the exercises recommended by your therapist(s). You may want to use your PA to help you strengthen your body and stay in good physical health.

**PHYSICAL THERAPY or OCCUPATIONAL THERAPY**

|   | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|---|--------------------------|--------------------------|
| Do you go to therapy?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Number of times per week _____                                      |                          |                          |
| Do you want your PA to be trained to help with exercise/stretching? | <input type="checkbox"/> | <input type="checkbox"/> |

Please explain the exercises/stretching.

You may want to make a videotape with your therapist or other trained PA in how to do the stretches or exercises.

You may want to have a new PA go with you to a therapy appointment to learn the exercises or stretches.

**Other Considerations:**

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## ORAL HYGIENE

Gum disease and poor dental care can lead to serious health problems. If you need help brushing and flossing your teeth or caring for your dentures, be clear about all of your dental care needs. Think about any oral health problems you may have and the care you require. If you have sensitive teeth, or have areas in your mouth that need more care or attention, explain all of this to your PA.

**Issues to consider:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Do you need help brushing your teeth?                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>  |                          |                          |
| Do you brush your teeth 1x, 2x or 3x a day?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use an electric toothbrush?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with your electric toothbrush?                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use a water pick?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with your water pick?                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you floss your teeth?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with flossing?                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use mouthwash?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with mouthwash?                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have removable dentures or other removable dental device? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help removing dentures or other dental device?       | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help cleaning dentures or other dental device?       | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have gum disease?   | <input type="checkbox"/> | <input type="checkbox"/> |

**Please explain care needed:**

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**Other Considerations:**

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## PET CARE

If you have a pet(s), you must tell the person you are interviewing. Some people are afraid of certain animals, may be allergic or just do not like them. It is important to find this out at the interview, especially if you need your PA to help you care for your pet.

**Issues to consider:**

|                       | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|-----------------------|--------------------------|--------------------------|
| Do you have any pets? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,** do you need your PA to:

|                |                          |                          |
|----------------|--------------------------|--------------------------|
| Feed your pet? | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------|--------------------------|--------------------------|

|                 |                          |                          |
|-----------------|--------------------------|--------------------------|
| Water your pet? | <input type="checkbox"/> | <input type="checkbox"/> |
|-----------------|--------------------------|--------------------------|

|                |                          |                          |
|----------------|--------------------------|--------------------------|
| Walk your pet? | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------|--------------------------|--------------------------|

|                 |                          |                          |
|-----------------|--------------------------|--------------------------|
| Clean birdcage? | <input type="checkbox"/> | <input type="checkbox"/> |
|-----------------|--------------------------|--------------------------|

|                  |                          |                          |
|------------------|--------------------------|--------------------------|
| Clean fish tank? | <input type="checkbox"/> | <input type="checkbox"/> |
|------------------|--------------------------|--------------------------|

|  |                          |                          |
|--|--------------------------|--------------------------|
| Clean the kitty litter box or dog pen? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|                 |                          |                          |
|-----------------|--------------------------|--------------------------|
| Bathe your pet? | <input type="checkbox"/> | <input type="checkbox"/> |
|-----------------|--------------------------|--------------------------|

|                              |                          |                          |
|------------------------------|--------------------------|--------------------------|
| Take your pet to be groomed? | <input type="checkbox"/> | <input type="checkbox"/> |
|------------------------------|--------------------------|--------------------------|

|                         |                          |                          |
|-------------------------|--------------------------|--------------------------|
| Give your pet medicine? | <input type="checkbox"/> | <input type="checkbox"/> |
|-------------------------|--------------------------|--------------------------|

|                                    |                          |                          |
|------------------------------------|--------------------------|--------------------------|
| Take your pet to vet appointments? | <input type="checkbox"/> | <input type="checkbox"/> |
|------------------------------------|--------------------------|--------------------------|

**Other Considerations:**

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|                             |
|-----------------------------|
| <b>RELIGIOUS ACTIVITIES</b> |
|-----------------------------|

If you belong to a religious group or church, or like being part of a local fellowship, think about your level of involvement when you answer these questions. You may be able to start or increase your involvement, if you want to, with the help of a PA.

**Issues to consider:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Do you belong to a religious group or church or faith-sponsored social group?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you want to join a religious group, church or faith-sponsored social group?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you want to attend services, meetings or social events?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need assistance to be able to attend services/meetings/events?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Are services and meeting information presented verbally and visually, dramatically and musically?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Are materials available in large print, Braille, or videotape?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there an amplifying sound system?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there a sign language interpreter available?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Is there adequate lighting?  | <input type="checkbox"/> | <input type="checkbox"/> |
| Are the parking lot and walkways accessible?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> <li>• Curb cuts?</li> <li>• Walkways at least 48 inches wide?</li> <li>• Close accessible parking?</li> <li>• Are ramps and stairs accessible?</li> <li>• Doors and doorways?</li> <li>• Is the worship or meeting space accessible?</li> <li>• Is there an accessible bathroom?</li> <li>• Water fountain?</li> <li>• Elevator or chair lift?</li> </ul> |                          |                          |

**Other Considerations:**

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|                |
|----------------|
| <b>SHAVING</b> |
|----------------|

If shaving is part of your routine, these questions will help you think about what kind of help you may want or need. Shaving equipment such as razors and supplies such as shaving lotion or foam come in many shapes, sizes, and dispensers that may make this task more convenient for you. Remember, the kind of help you want or need is up to you and should be discussed with any potential employees and of course, the PA you decide to hire.

**Consider these issues:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help shaving?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>                          |                          |                          |
| Do you shave every day?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use an electric razor?                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use a safety razor?                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you shave under your arms?                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you shave your legs?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you shave your face?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with aftershave or lotion?    | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help trimming a beard or mustache? | <input type="checkbox"/> | <input type="checkbox"/> |

**Other Considerations:**

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## SLEEP SCHEDULE

These questions will help you think about the kind of help you may want or need with regard to your sleeping habits or schedule. Your PA should know if you need to be turned during the night, when to wake you up and how you like to wake up. Also, talk with your PA about what you like when you are going to sleep. For example, do you like to listen to music while falling asleep or do you need total silence? Do you prefer heavy or light covers; do you keep a dim light on?

**Issues to consider:**

|  | <u>YES</u>               | <u>NO</u>                |
|--|--------------------------|--------------------------|
| Do you need help with any part of your bedtime routine?                    | <input type="checkbox"/> | <input type="checkbox"/> |
| <b><u>If yes,</u></b>  |                          |                          |
| Do you use an alarm clock?   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help using the alarm clock?                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help transferring in and out of bed?                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need to be turned during the night?                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help using the restroom during the night?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Will you need your PA to stay overnight?                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use an oxygen machine while sleeping?                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you use a catheter drainage bag while sleeping?                         | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you wear any type of orthopedic equipment while sleeping?               | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you need help with any limb or muscle stretching before going to sleep? | <input type="checkbox"/> | <input type="checkbox"/> |

**Other Considerations:**

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## TOILETING

If you need help with toileting, it is important to hire someone who can handle your toileting needs with sensitivity to your body and to your dignity. Some of the people you will interview may not have much experience in helping people with toileting needs. Be sure to discuss it in the interview. You will have to be specific and be certain that they can manage your individual needs. Be upfront when talking about your needs. Let people you interview tell you what their experience is and whether or not they are comfortable with the issue.

If you only need help getting to the restroom, make sure you PA will respect your privacy.

**Issues to consider:**

|                                  |  |                                       |
|----------------------------------|--|---------------------------------------|
| Do you need help with toileting? | <u>YES</u><br><input type="checkbox"/> | <u>NO</u><br><input type="checkbox"/> |
|----------------------------------|--|---------------------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| If yes,<br>Are you on a bladder care program? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

Give as much detail as possible, for example, transfer help, anything invasive, help with cleaning.

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|                                  |                          |                          |
|----------------------------------|--------------------------|--------------------------|
| Are you on a bowel care program? | <input type="checkbox"/> | <input type="checkbox"/> |
|----------------------------------|--------------------------|--------------------------|

Give as much detail as possible, for example, transfer help, anything invasive, help with cleaning.

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- Do you need help removing clothing?
- Do you need help cleaning after toileting?
- Do you need help transferring?
- Do you use adult diapers?

Please explain care needed: (for example, removing briefs, cleaning, replacing briefs)

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- Do you use the toilet?
- Do you use grab bars?
- Do you use a bedside commode?
- Do you use a bedpan?

**Other Considerations:**

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## TRANSFERRING

If you need help transferring, your PA should be strong enough to help you. Make sure the people you interview have the physical strength to transfer you safely.

One more thing to think about is that your transferring needs may change in the future. Changes in your transferring needs might be from an injury or a surgery. These changes could be short-term, or possibly become permanent. Discussing these possibilities with your new PA can prepare you both for a job description change if needed.

**Issues to consider:**

Do you need help with transferring?

**YES**      **NO**  
           

Describe the level of help you need. (i.e., do you need minimum, moderate or maximum help, contact guard or other?)

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Do you use any special equipment to transfer? (transfer board, hydraulic or electric lift) You may want to make a videotape showing how you want to be transferred.

Describe the equipment and how it works. (For example, I use a hydraulic sling lift and need assistance getting in the sling, then someone must operate the lift to move me to my chair.)

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Please mark the areas you need help in transferring:

- Bed       Toilet       Chair       Car       Bath/Shower

Other, please explain:

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Please explain the method you like for transferring. Do your transfer needs change across the day or when you are tired?

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**Other Considerations:**

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|-----------------------|
| <b>TRANSPORTATION</b> |
|-----------------------|

If you will be using your own car or van, but want or need your PA to drive, be sure your insurance coverage includes other drivers. If you will be riding in your PA's car or van, you will want to see their proof of insurance and a valid driver's license. Mileage to medical appointments can be reimbursed in Kansas.

|                                   | <u>YES</u>               | <u>NO</u>                |
|-----------------------------------|--------------------------|--------------------------|
| Do you use public transportation? | <input type="checkbox"/> | <input type="checkbox"/> |

Will you need transportation for any of the following:

- |                                    |                          |                          |
|------------------------------------|--------------------------|--------------------------|
| Work                               | <input type="checkbox"/> | <input type="checkbox"/> |
| Leisure Activities                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Church                             | <input type="checkbox"/> | <input type="checkbox"/> |
| Dates                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Shopping (grocery, clothing, etc.) | <input type="checkbox"/> | <input type="checkbox"/> |
| Doctor and therapist appointments  | <input type="checkbox"/> | <input type="checkbox"/> |

If you have an adapted vehicle, does it have:

- |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|
| • a lift                 | <input type="checkbox"/> | <input type="checkbox"/> |
| • hand controls          | <input type="checkbox"/> | <input type="checkbox"/> |
| • foot controls          | <input type="checkbox"/> | <input type="checkbox"/> |
| • adapted steering wheel | <input type="checkbox"/> | <input type="checkbox"/> |

|  |                          |                          |
|--|--------------------------|--------------------------|
| Will you need someone to drive your vehicle to appointments? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

**Other Considerations:**

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|               |
|---------------|
| <b>TRAVEL</b> |
|---------------|

If you travel for vacation or work, you may need a PA to travel with you. These questions will help you think about all the needs that you may have in order to take a trip.

**Issues to consider:**

|   | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|---|--------------------------|--------------------------|
| Do you ever travel away from your home? | <input type="checkbox"/> | <input type="checkbox"/> |

**If yes,**

|               |                          |                          |
|---------------|--------------------------|--------------------------|
| Do you drive? | <input type="checkbox"/> | <input type="checkbox"/> |
|---------------|--------------------------|--------------------------|

|             |                          |                          |
|-------------|--------------------------|--------------------------|
| Do you fly? | <input type="checkbox"/> | <input type="checkbox"/> |
|-------------|--------------------------|--------------------------|

|                                      |                          |                          |
|--------------------------------------|--------------------------|--------------------------|
| Do you need help planning your trip? | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------------------|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help planning what to pack? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help packing your suitcase? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need help making hotel or other sleeping arrangements? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|                                      |                          |                          |
|--------------------------------------|--------------------------|--------------------------|
| Does the room need to be accessible? | <input type="checkbox"/> | <input type="checkbox"/> |
|--------------------------------------|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you want your PA to pack any AT devices you use? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Do you need your PA to travel with you? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

**If yes,**

|  |                          |                          |
|--|--------------------------|--------------------------|
| Do you need your PA to stay with you on your trip? | <input type="checkbox"/> | <input type="checkbox"/> |
|--|--------------------------|--------------------------|

|   |                          |                          |
|---|--------------------------|--------------------------|
| Will you need your PA to give you the same type of help as you get at home? | <input type="checkbox"/> | <input type="checkbox"/> |
|---|--------------------------|--------------------------|

**Other Considerations:**

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## **WRAP-UP WITH ASSISTIVE TECHNOLOGY (AT)**

In each section, you have been asked if you are using any assistive technology (AT) devices or want to use an AT device during activities of your daily routine. If you identified devices you would like, you should think about an AT evaluation. You can contact your payroll agent, case manager or talk to a trusted friend about resources in your area. In Kansas, you can call 800-526-3648 to reach your local AT Access Site. They can help you determine what AT needs you have and how to get this equipment.

If you already have AT devices, it is important to take care of them. Complete the AT Device Maintenance pages that follow.

## AT DEVICE MAINTENANCE

When using any type of equipment, it is important to keep it in good working order. This section will help you think about the kind of equipment you use and how it works. Do you need your PA to help you keep things clean and in working order? Let your PA know how your equipment works and how you will want them to help you with it.

**Issues to consider:**

|  | <b><u>YES</u></b>        | <b><u>NO</u></b>         |
|--|--------------------------|--------------------------|
| Do you use equipment for any of the following? |                          |                          |
| Mobility                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Lifting  | <input type="checkbox"/> | <input type="checkbox"/> |
| Transferring                                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Bathing  | <input type="checkbox"/> | <input type="checkbox"/> |
| Toileting                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Personal Care                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Exercise                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Recreation                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Transportation Equipment/Community Access      | <input type="checkbox"/> | <input type="checkbox"/> |
| Medical Equipment                              | <input type="checkbox"/> | <input type="checkbox"/> |
| Hearing  | <input type="checkbox"/> | <input type="checkbox"/> |
| Communication                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Vision   | <input type="checkbox"/> | <input type="checkbox"/> |
| Learning                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Banking  | <input type="checkbox"/> | <input type="checkbox"/> |



**Other Considerations:**

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**AT DEVICE MAINTENANCE**

Below, list the AT device or equipment you use and what type of help you want or need to keep them maintained.

For example:

If you use a power wheelchair, do you:

- Need help changing or replacing the battery?
- Need wheelchair tires inflated for you?

If you use a pneumatic or electric lift:

- What kind of maintenance does it need?
- Do you need it cleaned for you?

Your PA should understand how the equipment you use works.

| Type of Device/Equipment You Use | Maintenance Help Needed |
|----------------------------------|-------------------------|
|                                  |                         |
|                                  |                         |
|                                  |                         |

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The Tennessee Personal Assistance Supports and Services (PASS) User's Guide, developed under a Department of Health and Human Services grant by The Arc of Tennessee, was used as a model for this document.

The authors of the Kansas Self-Direction Toolkit would like to publicly thank The Arc of Tennessee for generously sharing their materials.

**Kansas University Center on  
Developmental Disabilities at Parsons**

2601 Gabriel  
Parsons, Kansas 67357  
1-800-617-0907  
620-421-8367  
Fax: 620-421-0954

**K-PASS Project Director: Sara Sack – [ssack@ku.edu](mailto:ssack@ku.edu)**





# **Appendix D**

## **Sample Job Competencies**



## Sample Job Competencies

This is a sample list of competencies. Consider this list as a place to start as you begin the process of selecting the qualities and skills most important to you.

|                                       |  |
|---------------------------------------|--|
| <b>Work Commitment</b>                | Willingly gives extra effort and time to get a job done. Identifies with employer's goals, and exhibits good time management skills.   |
| <b>Building Relationships</b>         | Able to establish a rapport with employer and respect his/her wishes.  |
| <b>Communication Skills</b>           | Able to talk openly and honestly about all aspects of employer's job requirements. Able to understand instructions. Able to communicate with employer in the way employer likes to and is able to communicate. |
| <b>Teachable</b>                      | Willing to learn and be trained by the employer.   |
| <b>Action Oriented</b>                | Takes direction from employer and is able to follow instructions. Facilitates but does not influence events to achieve employer's goals.   |
| <b>Problem Solving</b>                | Able to assess needs within agreed upon duties and consider course of action best to meet those needs.   |
| <b>Physical Strength/Coordination</b> | Able to meet all physical needs of employer, including but not limited to: transferring, wheelchair maneuvering, possible lifting/moving of equipment.   |
| <b>Housekeeping</b>                   | Able to keep employer's area/home clean, orderly and sanitary.   |

|                               |   |
|-------------------------------|---|
| <b>Cooking</b>                | Able to plan and prepare meals as directed by employer.   |
| <b>Driving</b>                | Has dependable transportation, valid driver's license and current car insurance. Able to drive employer if/when necessary as directed by employer.  |
| <b>Personal Appearance</b>    | Dresses neatly and is well groomed. Does not report to work looking messy or unclean. If accompanying employer in the community, dresses appropriately.   |
| <b>Time Management</b>        | Able to complete tasks assigned by employer effectively, efficiently and on time.   |
| <b>Safety Awareness</b>       | Puts health and safety of employer first. Able to identify any factors in employer's environment that may be harmful to employer and practices good judgment in avoiding/preventing harm to employer.     |
| <b>Crisis Management</b>      | Able to remain calm in an emergency situation. Able to remember and follow emergency policy and procedures.   |
| <b>Punctual</b>               | Shows up for work on time. Stays for entire shift. Does not work overtime unless authorized by employer.  |
| <b>Scheduling / Reporting</b> | Considerate of employer's scheduling needs. Mindful to call in when unable to report to work with advance notice or as soon as possible if personal emergency occurs.                                     |
| <b>Record Keeping</b>         | Keeps neat, organized and appropriate records. Maintains all necessary documentation including but not limited to work schedule, timesheets, daily log, employer's calendar of appointments if necessary. |



|                      |   |
|----------------------|---|
| <b>Discrete</b>      | Always mindful of employer's privacy. Able to maintain confidentiality in all areas of information learned in regards to employer's life, needs, care.      |
| <b>Compassionate</b> | Able to be sensitive to employer's needs, dignity and desires while providing professional level of care.   |
| <b>Respectful</b>    | Able to respect employer as employer. Does not begin to assume a more controlling role in employer's life but rather understands and functions as employee. |



# **Appendix E**

## **Kansas Colleges and Universities**



## Kansas Community Colleges, Colleges, and Universities

Consider expanding your search for a personal assistant (PA) by posting your job advertisement at one of the universities, colleges, community colleges, technical schools, or other educational programs including business, technology, industry, and cosmetology schools in your own community.

An Internet search (<http://www.google.com>) can often provide you with an address and phone number to get you started.

- Take a look at <http://www.univsource.com/ks.htm> for a list of Kansas colleges, community colleges, and universities.
- The Kansas Board of Regents website lists Kansas technical schools, community colleges and universities at <http://www.kansasregents.org/institutions>.
- Consider other professional training schools in your community, for example, cosmetology schools (<http://www.a2zcolleges.com/Beauty/ks.html>).

Here's a partial list of Kansas colleges, community colleges and universities to get you started thinking about where you might find your next personal assistant. Notice that you just need to look for the town or city to find the schools in your area.

### A

#### **Arkansas City**

Cowley County Community College  
125 S. 2<sup>nd</sup> St.  
Arkansas City, KS 67005  
Phone: 620-442-0430 (or)  
1-800-593-2222

#### **Atchison**

Benedictine College  
1020 North Second Street  
Atchison, KS 66002  
Phone: 913-367-5340

### B

#### **Baldwin City**

Baker University  
PO Box 65  
Baldwin City, KS 66006-0065  
Phone: 785-594-6451

#### **Beloit**

North Central Kansas Technical College

#### **Beloit Campus**

PO Box 507  
Beloit, KS 67420  
Phone: 785-738-2276 (or)  
1-800-658-4655

### C

#### **Chanute**

Neosho County Community College  
800 West 14<sup>th</sup> Street  
Chanute, KS 66720  
Phone: 620-431-2820

#### **Coffeyville**

Coffeyville Community College  
400 West 11<sup>th</sup>  
Coffeyville, KS 67337  
Phone: 620-251-7700

#### **Colby**

Colby Community College  
1255 S. Range Ave.  
Colby, KS 67701-4007  
Phone: 785-462-4690

**Concordia**

Cloud County Community College  
2221 Campus Dr.  
PO Box 1002  
Concordia, KS 66901  
Phone: 785-243-1435 (or)  
1-800-729-5101

D

**Dodge City**

Dodge City Community College  
2501 N. 14<sup>th</sup> Ave.  
Dodge City, KS 67801-2399  
Phone: 620-225-1321 (or)  
1-800-367-3222

E

**El Dorado**

Butler County Community College  
901 S. Haverhill Rd.  
El Dorado, KS 67042  
Phone: 316-321-2222

**Emporia**

Emporia State University  
1200 Commercial Street  
Emporia, KS 66801  
Phone: 620-341-1200

F

**Fort Scott**

Fort Scott Community College  
2108 South Horton  
Fort Scott, KS 66701  
Phone: 620-223-2700 (or)  
1-800-874-3722

G

**Garden City**

Garden City Community College  
801 Campus Dr.

Garden City, KS 67846  
Phone: 620-276-7611 (or)  
1-800-658-1696

**Great Bend**

Barton County Community College  
245 NE 30<sup>th</sup> Road  
Great Bend, KS 67530  
Phone: 620-792-2701 (or)  
1-800-722-6842

H

**Haviland**

Barclay College  
607 N. Kingman  
Haviland, KS 67059  
Phone: 620-862-5252 (or)  
1-800-862-0226

**Hays**

Fort Hays State University  
600 Park Street  
Hays, KS 67601-4099  
Phone: 785-628-4000

North Central Kansas Technical College  
Hays Campus  
2205 Wheatland  
Hays, KS 67601  
Phone: 1-888-567-4297

**Hesston**

Hesston College  
Box 3000  
Hesston, KS 67062-2093  
Phone: 620-327-4221

**Highland**

Highland Community College  
606 West Main  
Highland, KS 66035-4165  
Phone: 785-442-6000

**Hillsboro**

Tabor College  
 400 S. Jefferson  
 Hillsboro, KS 67063  
 Phone: 620-947-3121

**Hutchinson**

Hutchinson Community College  
 1300 North Plum  
 Hutchinson, KS 67501  
 Phone: 620-665-3500 (or)  
 1-800-289-3501

I

**Independence**

Independence Community College  
 College Ave. & Brookside Dr.  
 PO Box 708  
 Independence, KS 67301  
 Phone: 620-331-4100 (or)  
 1-800-842-6063

**Iola**

Allen County Community College  
 1801 N. Cottonwood  
 Iola, KS 66749  
 Phone: 620-365-5116

J

K

**Kansas City**

Central Baptist Theological Seminary  
 741 N. 31 Street  
 Kansas City, KS 66102-3964  
 Phone: 1-800-677-2287

**Donnelly College**

608 North 18<sup>th</sup> St.  
 Kansas City, KS 66102  
 Phone: 913-621-6070

Kansas City Kansas Community College  
 7250 State Avenue  
 Kansas City, KS 66112

Phone: 913-334-1100

University of Kansas Medical Center  
 3901 Rainbow Boulevard  
 Kansas City, KS 66160  
 Phone: 913-588-5000

L

**Lawrence**

Haskell Indian Nations University  
 155 Indian Avenue  
 Lawrence, KS 66046  
 Phone: 785-749-8404

Pinnacle Career Institute  
 1601 W. 23<sup>rd</sup> Street, Suite 200  
 Lawrence, KS 66046  
 Phone: 785-841-9640 (or)  
 1-800-426-8084

The University of Kansas  
 Lawrence, KS 66045  
 Phone: 785-864-2700

**Lenexa**

Brown Mackie College  
 Lenexa Campus  
 9705 Lenexa Dr.  
 Lenexa, KS 66215  
 Phone: 1-888-253-0144

**Leavenworth**

University of Saint Mary  
 4100 South Fourth Street  
 Leavenworth, KS 66048  
 Phone: 913-682-5151

**Liberal**

Seward County Community College  
 1801 N. Kansas  
 PO Box 1137  
 Liberal, KS 67901-1137  
 Phone: 620-624-1951 (or)  
 1-800-373-9951

**Lindsborg**

Bethany College  
 421 North First Street  
 Lindsborg, KS 67456-1897  
 Phone: 785-227-3311

M

**Manhattan**

Kansas State University  
 Manhattan, KS 66506  
 Phone: 785-532-6011

Manhattan Christian College  
 1415 Anderson Ave.  
 Manhattan, KS 66502  
 Phone: 785-539-3571

**McPherson**

Central Christian College  
 1200 S. Main Street  
 PO Box 1403  
 McPherson, KS 67460  
 Phone: 620-241-0723

McPherson College  
 1600 East Euclid St., PO Box 1402  
 McPherson, KS 67460  
 Phone: 1-800-365-7402

N

**Newton**

Bethel College  
 300 East 27<sup>th</sup> Street  
 North Newton, KS 67117-0531  
 Phone: 1-800-522-1887

O

**Olathe**

MidAmerica Nazareen University  
 2030 E. College Way  
 Olathe, KS 66062-1899  
 Phone: 1-913-782-3750 (or)  
 1-800-800-8887

**Ottawa**

Neosho County Community College  
 Ottawa Campus  
 226 Beech  
 Ottawa, KS 66067  
 Phone: 785-242-2067

Ottawa University  
 1001 S. Cedar Street  
 Ottawa, KS 66067-3399  
 Phone: 785-242-5200 (or)  
 1-800-755-5200

**Overland Park**

Johnson County Community College  
 12345 College Blvd.  
 Overland Park, KS 66210  
 Phone: 913- 469-8500

P

**Parsons**

Labette Community College  
 200 South 14<sup>th</sup> Street  
 Parsons, KS 67357  
 Phone: 620-421-6700 (or)  
 1-888-LABETTE

**Pittsburg**

Pittsburg State University  
 1701 South Broadway  
 Pittsburg, KS 66762  
 Phone: 620-231-7000

**Pratt**

Pratt Community College  
 348 NE SR 61  
 Pratt, KS 67124  
 Phone: 620-672-9800 (or)  
 1-800-794-3091

Q

R

S



**Salina**

Brown Mackie College  
 Salina Campus  
 2106 S. 9<sup>th</sup> St.  
 Salina, KS 67401  
 Phone: 1-888-242-2971

Kansas State University at Salina  
 College of Technology and Aviation  
 2310 Centennial Road  
 Salina, KS 67401-8058  
 Phone: 785-826-2640 (or)  
 1-800-248-5782

Kansas Wesleyan University  
 100 E. Claflin Ave.  
 Salina, KS 67401  
 Phone: 785-827-5541 (or)  
 1-800-874-1154

**St. Marys**

St. Mary's Academy & College  
 200 E. Mission Street  
 St. Marys, KS 66536  
 Phone: 785-437-2471

**Sterling**

Sterling College  
 125 W. Cooper, PO Box 98  
 Sterling, KS 67579  
 Phone: 620-278-2173 (or)  
 1-800-346-1017

**T****Topeka**

Washburn University  
 1700 SW College Avenue  
 Topeka, KS 66621  
 Phone: 785-231-1010

U  
 V  
 W

**Wichita**

Friends University  
 2100 W. University St.  
 Wichita, KS 67213  
 Phone: 316-295-5000 (or)  
 1-800-577-2233

Newman University  
 3100 McCormick Ave.  
 Wichita, KS 67213  
 Phone: 316-942-4291 (or)  
 877-NEWMANU

Wichita State University  
 1845 N. Fairmount  
 Wichita, KS 67260  
 Phone: 316-978-3456

**Winfield**

Southwestern College  
 100 College St.  
 Winfield, KS 67156  
 Phone: 1-800-846-1543

X  
 Y  
 Z



# **Appendix F**

## **Sample Policies**



## Sample Policies

Many organizations create policies to help their employees understand the behavior that is expected of them on the job. As you become more familiar with self-directing your personal assistance supports and services you may find that you have identified some behaviors that either must happen or must not happen when your PA is working for you. These decisions can be called policies. Here are some sample policies adapted from policies created by OCCK, a community service provider, to get you started.

**Absences** – I expect you to come to work when you are scheduled to work. My independence depends on your dependability. Not coming to work and not calling me to make other arrangements more than once will be grounds for termination. Excessive absences may be grounds for termination.

**Tardiness** – If a PA is going to be more than 15 minutes late getting to my home they must call and let me know. The time the PA writes on the timesheet must be the actual time they worked. Being tardy without calling me or being tardy too many times may be grounds for termination.

**Illness** – If a PA is ill the day they are scheduled to work they must notify me immediately. As the employer, I may contact you to cover another staff person's shift if they are ill. Please be aware that personal attendants and night support are a necessity, without these services I cannot live independently.

**Trading shifts** – If you have several PAs, you may decide to let your PAs manage who will cover each shift. If shifts are traded between PAs, in order to assure coverage, the shift that the PA agrees to cover then becomes their responsibility. If that PA cannot cover for some reason they need to find coverage. It does not default back to the original PA on schedule. In order to assure that everyone is aware of the change be sure to notify the employer and post a note on the PA board.

**Timesheets** - The employer keeps the timesheets. Each PA signs in on each shift and signs out at the end of each shift in front of the employer. Be aware that the State of Kansas and Medicaid can charge a PA with fraud if he or she records hours on a timesheet that they didn't work.

There are many other behaviors that could become policies. Here are a few more to consider.

**On-time and ready to work** - PAs are expected to arrive at my home prepared to work at least by the time your shift begins.

**PA friends and family** - PAs should not bring with them to work: friends, boyfriends, girlfriends, spouses or other relation. You are here to work for me and I expect your individual attention.

Your child(ren) may accompany you to work if you have cleared it with me first.  
**OR**

Your child(ren) may accompany you to work only under the following conditions:  
(a) you have no options for day care, (b) you have notified me prior to bringing them, (c) if they become a problem you must make other arrangements immediately or contact another PA to work your shift.

**Smoking** – Smoking is not permitted in my home. You may smoke outside. Please dispose of your cigarette butts in the can outside the door.

**Meals** - Meals are not provided. If you would like to bring your dinner you may keep it in the refrigerator and warm it in the microwave or oven. I can provide water to drink. If you prefer something else to drink please bring it with you. Please take any food with you that belongs to you at the end of your shift.

**Going out for entertainment** - When going out for entertainment I will pay for the PA if there is an admission fee. For example: the movies, an arts festival, etc.

**Record daily activities** - Record daily activities on your shift in my PA log notebook. Please keep timesheets here.

**Using my phone** - Ask me before using my phone for personal calls. These are allowed on a limited basis. You may receive personal calls on a limited basis also. If the calls interfere with your duties they need to stop. **ABSOLUTELY NO LONG DISTANCE CALLS ON MY PHONE. THAT IS GROUNDS FOR IMMEDIATE TERMINATION.**

**Using my washer or dryer** - You may not use my washer and dryer for your personal use. That is grounds for termination.

**Borrowing money** - You are not to borrow money from me. That is grounds for termination. It is also recommended not to loan me money or have me write checks to you should you pick something up for me. If you are picking something up at the store for me it is best to have me write a check to the store. Any checks on my account written to my PA can be suspect if SRS or any other agency should become involved for any reason.

**PA behavior** – PAs, please do not talk about each other in front of me.

When my PAs talk negatively about each other it has a negative affect on me. I tend to treat my PAs in rude ways when others speak badly of them.

If I express a concern about another PA please encourage me to speak with the person involved or my case manager or a family member.

If you have a concern about another PA please address your concerns to me in an objective manner remaining as positive as possible. Please avoid gossiping or complaining about other PAs.

I feel that my PAs are acting in my best interest and treat me with respect. I know that each PA has a different method of accomplishing the same task. This does not necessarily mean that anyone is wrong. Please help me remain positive by remaining positive yourself.

Thank you for your cooperation.

**Confidentiality** - All issues regarding the employer are to be handled in a confidential manner. Do not discuss employer's affairs with anyone without the employer's consent. PAs may share with each other only that information needed to carry out specific duties and training activities. Share information on a need-to-know basis. PA logs need to be restricted to information necessary for consistent services. Keep logs positive, objective and do not include negative comments concerning the employer or other PAs.

Breaking confidentiality may be grounds for termination.

**Good Idea!**

As you can see, the sample policies covered a wide range of behaviors. You could use or change any of the sample policies or write a policy of your own. Once you have shared your policies with your PA, it is a good idea to have them sign a statement that says "I have read the policies and I understand them."

These sample policies were adapted from OCCK's Self-Direct Instructional Manual with our thanks.

OCCK's Self-Direct Instructional Manual. (2004). S. Murray-Sincock. For more information contact Susan Murray-Sincock, Occupational Center of Central Kansas, Inc., Independent Connection, 1710 West Schilling Road, P.O. Box 1160, Salina, KS 67402-1160. Phone: (785) 827-9383.