# CT CPASS

**You Are the Employer:**

*A Guide to Hiring and Managing Personal Assistant Services*

**1**

**Module One**

*Knowing What You Need and Want*

# <u>YOU</u> ARE THE EMPLOYER
## A GUIDE TO HIRING AND MANAGING PERSONAL ASSISTANT SERVICES

Hiring personal assistants may seem overwhelming.
**It does not have to be!**
This guide was developed to provide you with the skills and resources you need to hire and manage your personal assistants.

**Module 1:** Identifying Your Needs and Wants

**Module 2:** Hiring a Personal Assistant

**Module 3:** Tax Considerations

**Module 4:** Employer Responsibilities

**Module 5:** Stress Management

**Module 6:** Communication Skills

**Module 7:** Additional Resources

This guide can be made available in alternate formats upon request.
Address specific requests to:  the University Center for Excellence in Developmental Disabilities at
1.860.679.1500 (v) or 860.679.1502 (TTY)

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# LEARNING OBJECTIVES

## AFTER COMPLETING MODULE 1, YOU WILL:

- Clearly state your individual needs and choices.

- Complete a **Needs Assessment** to help plan for your personal assistance services and in training new employees to be personal assistants.

- Provide at least 3 examples of how to adjust personal assistance services as your needs and/or interests change.

# SECTION 1:

## INTRODUCTION

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

# SECTION 2:

## NEEDS AND WANTS

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

- **What do you do on weekdays? On weekends?**

- **What support must you have to accomplish this?**

- **What can you do on your own?**

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

# SECTION 3:

## CREATING A NEEDS ASSESSMENT

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

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

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

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

# THE GENERAL NEEDS ASSESSMENT

## Task Areas

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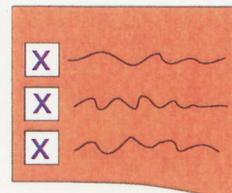
## Supports Needed

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

## Description / When

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

## Length of Time

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

## Priority Level

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

1 – Essential

2 – Important

3 – Nice

4 – When Time Is Available

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

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

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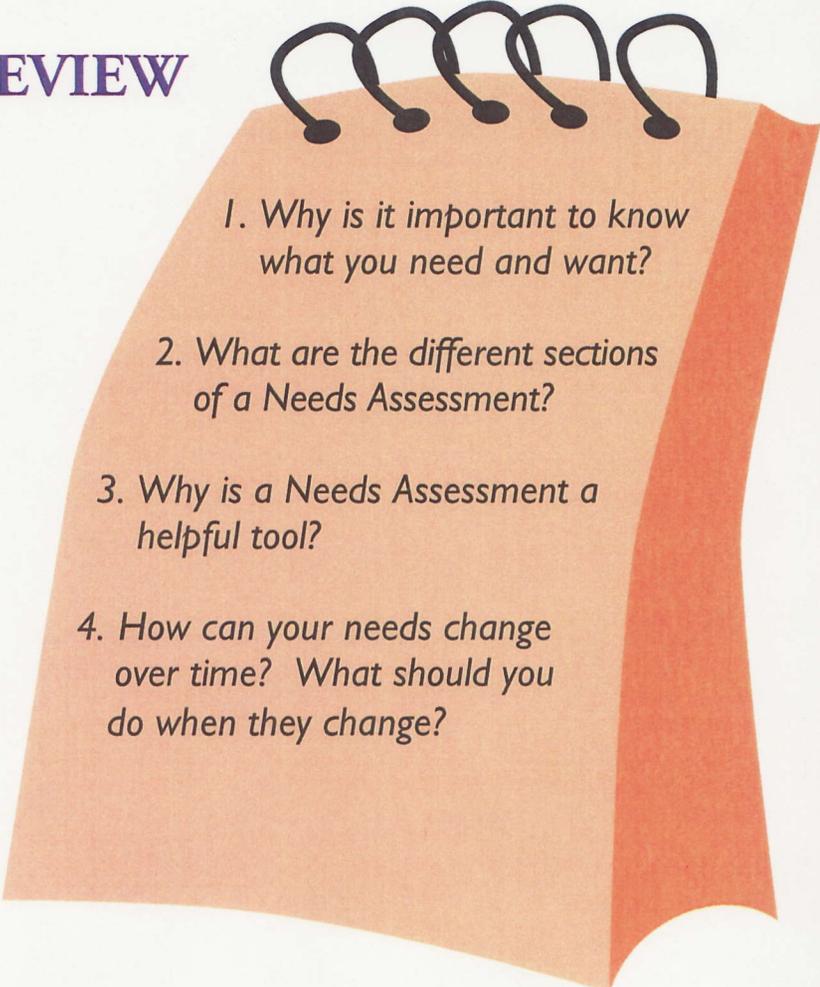
1. Why is it important to know what you need and want?

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

3. Why is a Needs Assessment a helpful tool?

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

# DEFINITIONS

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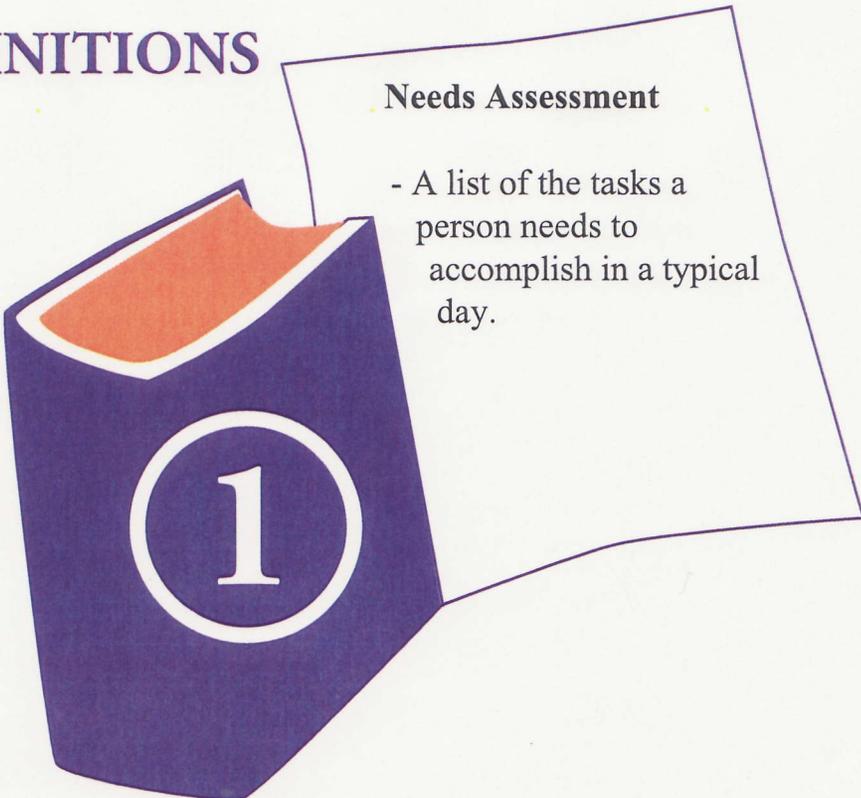
- A list of the tasks a person needs to accomplish in a typical day.

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# TASK CHECKLIST
## Knowing What You Need & Want
*Adapted from the Transition Guide through the Connecticut Nursing Facilities Transition Grant*

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

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

## PERSONAL CARE TASKS
### Task Area - Bathing

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Shower or Bath | | | |
| ☐ Wash & Rinse Body | | | |
| ☐ Wash Hair / Condition / Rinse | | | |
| ☐ Dry body thoroughly | | | |
| ☐ Apply lotion or powder | | | |
| ☐ Apply deodorant | | | |
| ☐ Shave | | | |
| ☐ Check supplies (e.g. soap) | | | |
| ☐ Thoroughly dry shower chair | | | |
| ☐ Clean-up bathroom | | | |
| ☐ Put away supplies, etc. | | | |
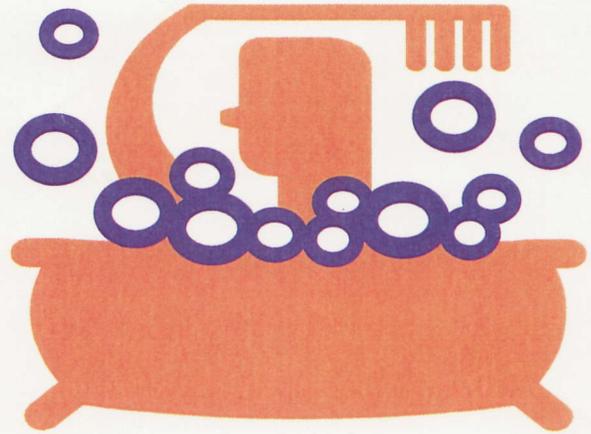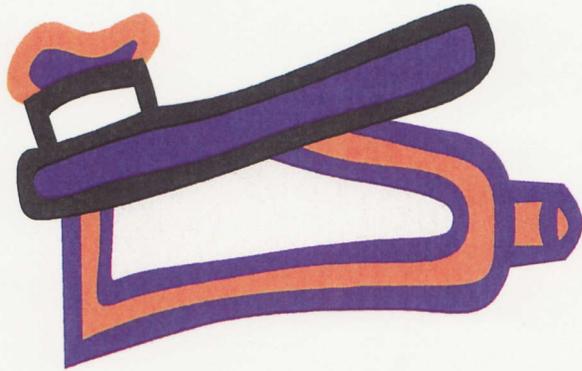
**Task Area** - Personal Hygiene

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Comb / brush / style hair | | | |
| ☐ Ear care | | | |
| ☐ Nail care | | | |
| ☐ Wash face / apply moisturizer | | | |
| ☐ Apply make-up | | | |
| ☐ Brush teeth | | | |

Task Area - Dressing

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Dressing | | | |
| ☐ Undressing | | | |

**Task Area -** Transfers

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Balance when transferring | | | |
| ☐ Pivot transfer | | | |
| ☐ Total lift (Needs to lift ____ lbs.) | | | |
| ☐ Sliding board | | | |
| ☐ Hoyer Lift (Manual / Electric) | | | |
| ☐ Ceiling Track Lift | | | |
| ☐ Other | | | |

**Task Area -** Toileting

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Use toilet / commode / urinal / bed pan | | | |
| ☐ Cleaning | | | |
| ☐ Menstrual Care | | | |
| ☐ Drain leg bag | | | |
| ☐ Hook up urinary drainage / ostomy equipment | | | |
| ☐ Clean urinary drainage equipment | | | |

**Task Area - Bladder Care**

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ In-dwelling catheter | | | |
| ☐ Condom-drainage | | | |
| ☐ Ilio conduit | | | |
| ☐ Other | | | |

**Task Area - Bowel Care**

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Digital Stimulation | | | |
| ☐ Suppositories | | | |
| ☐ Enema | | | |
| ☐ Laxative | | | |
| ☐ Colostomy | | | |
| ☐ Clean up after | | | |
| ☐ Other | | | |

## Task Area - Skin Care

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Prevent skin breakdown | | | |
| ☐ Treat skin breakdown | | | |
| ☐ Inform of any irritated skin areas to prevent sores | | | |

## Task Area - Medication

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Administer medication | | | |
| ☐ Get prescriptions from the store | | | |
| ☐ Give injections | | | |

## Task Area - Exercise

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Range of Motion | | | |
| ☐ Strengthening | | | |
| ☐ Circulation | | | |
| ☐ Assist with accessing local fitness centers or hydro-therapy | | | |
| ☐ Other | | | |

## Task Area - Positioning

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Position in bed | | | |
| ☐ Night time turning assistance and repositioning | | | |
| ☐ Position in chair / wheelchair | | | |

## Task Area - Respiration

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Set up ventilator | | | |
| ☐ Set up bipap or other equipment to assist with breathing | | | |
| ☐ Suctioning | | | |
| ☐ Clear throat & lungs by assisted cough | | | |

## Task Area - Other Equipment & Medical Needs

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Set up environmental control / computer | | | |
| ☐ Set up communication device | | | |
| ☐ Monitor Health (i.e. blood pressure) | | | |
| ☐ Other | | | |

# HOUSEHOLD & OTHER NEEDS

**Task Area** - Meal Preparation & Eating

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Prepare foods | | | |
| ☐ Cook | | | |
| ☐ Serve / cut food | | | |
| ☐ Feed | | | |
| ☐ Tube Feed | | | |
| ☐ Put food away | | | |
| ☐ Clean up (wash dishes / counters / appliances) | | | |

**Task Area** - Household Support

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Clean refrigerator | | | |
| ☐ Make / change bed | | | |
| ☐ Sweep | | | |
| ☐ Wash / mop floors | | | |
| ☐ Vacuum | | | |
| ☐ Dust | | | |
| ☐ Clean toilet / commode seat and bucket | | | |

**Task Area -** Household Support (continued)

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

## Task Area - Laundry

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Sort clothes | | | |
| ☐ Hand wash items | | | |
| ☐ Put clothes in wash | | | |
| ☐ Put clothes in dryer | | | |
| ☐ Iron | | | |
| ☐ Mend Clothes | | | |
| ☐ Bring Clothes to & from Dry Cleaners or Laundromat | | | |
| ☐ Other | | | |

## Task Area - Shopping

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Assist with making list | | | |
| ☐ Assist in store | | | |
| ☐ Assist with money | | | |
| ☐ Carry purchases home | | | |
| ☐ Put away purchases | | | |
| ☐ Help try on shoes /clothes | | | |
| ☐ Other | | | |

**Task Area** - Other Errands

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Assist at school / work | | | |
| ☐ Assist at meetings | | | |
| ☐ Medical Appointments | | | |
| ☐ Counseling Appointments | | | |
| ☐ Vocational / Case Management Appointments | | | |
| ☐ Banking | | | |
| ☐ Vehicle Maintenance | | | |
| ☐ Clean Vehicle | | | |
| ☐ Assist with social events | | | |
| ☐ Assist with attending religious services | | | |
| ☐ General errands / Other | | | |

**Task Area -** Transportation

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Arrange transportation | | | |
| ☐ Accessible vehicle driven by assistant | | | |
| ☐ Assistant uses own vehicle | | | |
| ☐ Assistant provides support on public transportation | | | |
| ☐ Assistant provides support on accessible transportation (ADA, Dial-a-Ride) | | | |
| ☐ Other | | | |

**Task Area -** Essential Communication

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Writing | | | |
| ☐ Telephone | | | |
| ☐ Computer | | | |
| ☐ Sign Language / Interpreting | | | |
| ☐ Other | | | |

## Task Area - Organizing

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Clean desk | | | |
| ☐ Organize paperwork | | | |
| ☐ Filing | | | |
| ☐ Organize clothes | | | |
| ☐ Organize drawers | | | |
| ☐ Organize closets | | | |
| ☐ Other | | | |

## Task Area - Finances

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Prepare budgets | | | |
| ☐ Pay bills | | | |
| ☐ Make deposits | | | |
| ☐ Make withdrawals | | | |
| ☐ Prepare taxes | | | |
| ☐ Prepare paperwork required for benefits | | | |
| ☐ Assist with mail | | | |
| ☐ Other | | | |

**Task Area -** Pet Care

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

**Task Area -** Child Care

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Assist with care needs | | | |
| ☐ Assist with household needs | | | |
| ☐ Driving | | | |
| ☐ Other | | | |

**Task Area -** Managing Personal Assistants

| Support Needed | Description / When | Time Needed | Priority Level |
|---|---|---|---|
| ☐ Advertise for PA | | | |
| ☐ Assist in Interviewing PA | | | |
| ☐ Check references | | | |
| ☐ Assist with hiring / paperwork for PA | | | |
| ☐ Train PA | | | |
| ☐ Scheduling | | | |
| ☐ Arrange back-up as needed | | | |
| ☐ Complete timesheets | | | |
| ☐ Other | | | |

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