



**THE REHABILITATION CENTER**  
AT SANTA CLARA VALLEY MEDICAL CENTER  
BRAIN INJURY | SPINAL CORD INJURY | STROKE

VMC's Peer Support Program

# **Hiring and Management of Personal Care Assistants**

Initially created with funding from the National Institute on Disability and Rehabilitation Research U.S. Department of Education. Updated and revised by the , Rehabilitation Center at Santa Clara Valley Medical Center, Peer Support Program.

Please note: This guide is to be used as a general reference. Please contact Santa Clara Valley Medical Center's, Peer Support Program for more information or to be connected with someone who could provide more detailed information. Please call: 408 885 2397

## **What are "Personal Assistance Services"?**

For many individuals with a disability, part of coming to terms with the spinal cord injury is accepting that as a result of physical limitations, there is now a need to rely on someone else to fulfill some of your needs. Learning how to live with this newly acquired need for assistance, while not compromising independence and dignity, can be challenging. There are many issues to consider when planning for personal care needs to be met, and several will be addressed in the following pages.

Personal Assistance Services (PAS) include a variety of activities which are determined by the individual needs of the person with a disability. Personal assistance services can range from assistance with grocery shopping and meal preparation to bathing, bowel and bladder care.

The Personal Care Assistant (PCA) is the person who assists the individual with spinal cord injury with his or her daily living activities. The PCA is also referred to as

an "attendant" or "caregiver", whether the care is being provided by a spouse, parent, friend, or hired employee.

## **Options for Personal Assistance Services**

### ***Family Member/Spouse***

One of the first questions that is raised when considering who should provide personal assistance services is whether or not a family member should take on the role of personal care assistant. There are several factors to consider when making this decision. Oftentimes, the decision is made based on financial considerations, without taking into account other options or thinking about the potential toll that providing care may take on the personal relationship. When a family member, whether it be a parent, spouse, son or daughter assumes the role of personal care assistant, the lines between multiple roles can become blurred. Providing personal care can put stress on any relationship, and can be particularly hard on a marriage. It may be difficult for a partner who has the responsibility of performing bowel and bladder care to be involved in an intimate relationship as well. Respect and self-esteem are two important aspects of a relationship that may be adversely affected when a spouse takes on the role of personal

care assistant. It may be difficult for the individual with a disability to communicate and clarify his or her needs for fear of being perceived as too demanding. Or, because of a lack of control, the person with a disability may demand more of a spouse than he or she would of a PCA who is an employee. In the situation where a spouse becomes a caregiver, neither party should be perceived as being too passive or demanding, and creating such a balance in the relationship, which may already be strained, can pose a challenge. Couples need to be constantly aware of the balance of power in the relationship. Self-esteem, which is often decreased following the injury, may continue to be affected if a spouse is depended on to provide personal care which the person with a disability was previously able to do independently. Other points to consider when deciding whether or not a spouse should be the primary personal care assistant are the potential loss of personal space, sense of individuality and time commitment involved. The couple should consider how all aspects of their relationship would be affected before making such a decision.

Since good communication skills are an important factor in the relationship between you and your PCA,

consideration should be given to the communication skills of the couple before making a decision to have a spouse as caregiver.

One of the most important factors, but perhaps the most difficult to assess, is whether or not providing care to a spouse is even within the potential caregiver's capability and/or comfort level. Oftentimes a sense of obligation clouds this issue, and makes it difficult to assess whether or not a spouse would make a good personal care assistant. Consider how the potential loss of personal time and space, and sense of individuality would affect the relationship between the individual with a disability and spouse. The couple should think about all aspects of their relationship and how it would be affected before making a decision about a caregiver.

The positive aspect of having a spouse or significant other assume a caregiver role is familiarity. Having someone with whom a relationship has already been established involved in your personal care can be a strong factor in the PCA decision making process.

For some individuals with disabilities, economic necessity is the primary reason that the spouse or family member assumes the role of caregiver. Regardless of the circumstances, whenever a spouse or significant other takes on the personal care assistant role, it is helpful for both parties to take the time to clarify roles and plan together how care should be given. Other options for personal care assistants include friends and family members other than spouse or significant other. Many of the issues discussed previously are still important considerations - communication skills, comfort level of both parties, level of commitment, etc.

### ***Hired Employee***

Hiring a personal care assistant, someone who is, in fact, employed by you, may be the option that affords you the maximum amount of control and input into your care. A PCA who is an employee works for the person with the disability. The most important part of the job is to take direction and provide care in a manner that is suitable to his or her employer. There are a couple of options for finding a hired personal care assistant, one of which is utilizing a home health agency. One of the primary benefits of hiring a PCA through an agency is convenience, as the

agency presumably handles the screening and application process. Also, an agency will often provide back-up care in the event that the PCA is sick or doesn't show up for work unexpectedly. The disadvantages of hiring a PCA through an agency include higher cost in most cases, as well as a lack of control over choosing your caregiver. You will also most likely have to provide your PCA with specific training as to the needs of the individual with the disability, as most assistants do not receive such training.

Regardless of who takes on the role of personal care assistant, it is imperative to have a back-up plan in place in the event that the PCA gets sick, quits without notice or is unable to provide care for any reason. Being without a personal care assistant can be a frightening and intimidating experience that is best avoided. A well thought out plan that has been prepared before such an occasion occurs is the best way to handle the situation.

You should develop a list of people who are willing to be utilized as a back-up attendant, which could include family members, friends, school or organizational associates. Find out the time of day

and day of the week each person on the list could be available to assist you.

## **Finding a Personal Care Assistant**

There are several avenues to pursue when seeking a personal care assistant. The individual with the disability should assess his or her own situation and think about which recruitment method(s) might work. Prior to attempting to find a PCA, full consideration should be given to your specific needs, such as what times of the day care is needed the most, which types of caregiving activities are required, and how these could be consolidated into blocks of time.

One of the most common ways to find an attendant is through an advertisement in the newspaper/wanted ads. In a larger city, it may be advisable to advertise in the local area newspaper/wanted ads. The first step is to create an ad that briefly states your needs and what type of person is being sought, while hopefully sparking the interest of a prospective attendant. (See sample advertisements in attached packet). The ad should include a brief description of the types of assistance you need, hours, days, part-time versus full-time, live-in versus live-out, specific requirements for the position (such as heavy lifting, driver's license,



non-smoker, etc) and salary. You cannot list preferences based on sex, age or race as this is considered discrimination, and is against the law. Finally, include your phone number and name, and hours you can be contacted if necessary. It is not advisable to list a full name or address in the newspaper ad in order to protect yourself against anyone with less than good intentions.

Another suggestion for finding an attendant is to contact the local Independent Living Center. Attendant care is one of the key services independent living centers are funded to provide. Most independent living centers keep a listing of potential attendants, that may or may not have been preliminarily screened by the staff, and some even offer classes to train the person with the disability, who may need assistance with the hiring and management process, or the prospective attendant.

Other avenues to pursue in the search for a PCA include posting an ad on a bulletin board at the local community college or university's career placement center. It may be helpful to focus on those schools that offer specific curriculum for nursing or occupational/physical/recreational therapy.

Oftentimes the students in such programs need experience in the field in order to graduate.

There are other locations that may offer places to post a job listing that may attract prospective PCA's as well. Hospital bulletin boards may be a good source, as staff members may be looking for extra work. Advertising in a local church bulletin, at vocational rehabilitation agencies, or at local unemployment or social service agencies may also be worth trying. Finally, never underestimate the power of word of mouth. Get the word out by telling as many friends, family members, organizational associates and neighbors that you are looking for a PCA. A prospective attendant that has been referred by someone you know and trust may be your best bet. Also, talk to other individuals who have attendant care needs in your community to find out who they are using. Oftentimes one attendant will work for two or more people.

## **Screening and Interviewing A Prospective Personal Care Assistant**

In preparation for the screening and interview process, the individual with the disability should conduct a personal needs assessment to clarify those activities for which an attendant's assistance is needed. (see sample in attached packet). It is helpful to develop a checklist that encompasses all of the self-care, housekeeping, grocery shopping, errand running and transportation activities for which you need assistance. This checklist can be utilized in the screening and interview process. It is also helpful to clearly outline your expectations for how each task for which you require assistance will be completed. In preparing a checklist for a specific aspect of your personal care, be brief, put the tasks in the correct sequence, and be as thorough as possible. This checklist will be a useful tool for training your PCA, and may help to address any differences in opinion regarding how a specific task should be done.

Before beginning the search for a personal care assistant, there are several things to consider - your preference for a male or female caregiver, and whether you would like the caregiver to live-in or just

come in for several hours at a time to provide assistance. This, of course, also depends on the level of care that you require, as well as space limitations in your home and your need/desire for privacy. If space and your personal lifestyle permits, you may consider offering a personal care assistant room and board in exchange for personal assistant services.

It may be helpful to make a list of characteristics you would like in a caregiver. Give careful consideration to factors such as honesty, reliability, consideration, promptness, ability to listen, willingness to learn new or different tasks, and how important each of these characteristics are to you in your PCA. What are the most important, and least important, and what are you willing to compromise on? Think about whether or not you want an attendant with shared interests, and how important issues such as having reliable transportation, smoking, drug and alcohol use, and previous driving record are to you.

It is advisable to screen a prospective attendant before expending the time and energy on conducting a full interview on a person that may not be well suited to meet your needs. A brief phone/zoom interview can be a helpful tool for screening individuals who may be

interested in the job. The telephone/zoom interview can provide the opportunity to find out whether or not the potential candidate has the characteristics you are looking for in a PCA, as well as chance for him or her to learn more about the job (such as the schedule, salary, and other requirements).

If, after a brief discussion and assessment, you decide to interview the applicant, there are several guidelines that may be helpful when conducting an interview. Keep in mind, that it is not uncommon for someone to make an appointment for an interview and then not show. Ask the prospective job candidate to call in the event that he or she has changed his or her mind about the interview, or cannot make the scheduled appointment. The applicant should bring his or her social security number, at least two references, and a driver's license to the interview.

## **The Interview**

Consider conducting the interview at a location other than your home for safety reasons. If possible, have a friend or relative present or nearby during the interview. In preparation for the interview, have a list of your needs and exactly what the job entails, as well

as those issues/questions you would like to ask the applicant. Include space to write down your feelings (positive and negative) about the applicant following the interview.

The interview should be seen as an opportunity to get to know the prospective PCA. Discuss previous work experience, including length of employment for each position he or she has held. This is an important issue to bring up - you don't want to spend the time training a PCA to have him or her quit after a short time if you can avoid it. Inquire as to the type of work the applicant has enjoyed most and liked the least, and whether or not they have experience and are comfortable around a person with a disability. The applicant's transportation resources should also be discussed. If driving is a requirement for the position, talk about the applicant's driving record, and find out if he or she would be comfortable driving your vehicle should that be necessary. Talking about social issues such as smoking, alcohol and drug use, personal likes and dislikes, and recreation and leisure pursuits will provide the opportunity for you and the applicant to determine if it is feasible to work together.

The interview process is also the time to discuss your needs and exactly what the job entails in detail. It may be helpful to utilize either a job description or needs checklist as a guideline for this discussion. It is especially important to talk about any physical requirements of the job such as lifting, transferring, bathing, etc. After you have described your needs and the job requirements, ask the applicant whether or not there are any tasks he or she would not feel comfortable performing (such as the bowel program). Also discuss compensation - whether pay will be hourly or a combination of a stipend with room and board. Let the applicant know the days and hours you need assistance and clarify which days he/she will have off. Ask the applicant why he or she is interested in the job. Finally, finish the interview process by giving the applicant the opportunity to ask you questions about the job requirements or your lifestyle. Discuss your timeline for making a decision and assure him or her that you will get in touch with your choice whether or not they are selected for the position.

The next step in the interview process is to contact the applicant's references. It is imperative before hiring anyone to check their references. It can sometimes be difficult to get information from previous employers

for fear of a lawsuit, but explain your situation clearly, and if a reference refuses to give you information about an applicant, move onto the next reference, or ask the applicant for additional references. The feedback you receive from a previous employer may be the deciding factor in whether or not you hire someone. During a reference check, try to obtain information on the applicant's length of employment, type of tasks performed in the course of the job, reliability, promptness, response to feedback and supervision, ability to learn new tasks, and why the applicant left the previous job. Finally, ask the former employer whether or not the applicant would be considered for future employment.

## **Making A Decision**

After you have completed the interview process and obtained information from all of the applicant's references, it is time to make a decision as to who to hire for your personal care. The primary consideration when making a final selection should be your gut reaction to a potential applicant. Regardless of qualifications, if for any reason, you do not feel completely comfortable with an applicant, do not consider him or her for the position. Consider factors



such as how well the applicant's personality and lifestyle fit with yours. For example, is the applicant a night owl while you like to get an early start in the morning? Consider the physical as well as the emotional well-being of the applicant. Hiring an emotionally unstable person to provide personal care may be a roller coaster ride you are not ready for. Once a decision has been made, extend the job offer as soon as possible, and let all others know of your decision.

Once the applicant accepts the position, prepare and review the contract. The contract should specify hours of work per day or week, hourly pay, length of notice to be given for vacation, sick notice and termination notice (see sample). Once both parties have agreed to the terms of the contract, the agreement should be signed and dated by both.

## **Guidelines for Attendant Training**

You will need to teach your newly hired PCA what you need done in terms of your personal care, and how he or she can best meet your needs. If at all possible, the training process should begin in the hospital before discharge where the expertise of the staff can be

utilized to facilitate the process. Oftentimes, however, it is not possible to hire a PCA until after discharge from the hospital. It is helpful to utilize your self-care checklist when training your PCA. The checklist ensures that you have covered all aspects of your care, breaks down each task into manageable steps, and can be used as a written resource for your caregiver in the future. In order to help your personal care assistant better understand your needs, have frank discussion about your disability and how it relates to what you can and cannot do for yourself. If the PCA has a good foundation of knowledge about how the bowel and bladder are affected by a disability, then as you teach him or her how to perform bowel and bladder care, it will be easier to learn. Encourage your PCA to ask questions throughout the training process and clarify any medical or technical terms as you go along. There are several excellent self-care/education manuals for individuals with disabilities that can be used as training tools. Each personal care task (for example - bathing) should be broken down into smaller, manageable steps. Give the PCA instruction on each step and explain why it is important to you that each step be done the way you request. Remember that repetition is the key to learning, therefore, it may take your PCA several

attempts before he or she performs the task exactly the way you would like. Encourage your PCA to give you feedback and ask questions. Give positive feedback when your caregiver gets the task right and use humor whenever possible.

## **Your Relationship with Your PCA**

Providing a positive work environment is a key factor in keeping your personal care assistant. Good communication is the key to maintaining any relationship - and your relationship with your caregiver is no exception. It is important to keep communication pathways open. If you sense any problems or misunderstandings with your caregiver, get them out in the open by confronting the issue and discussing it as quickly as possible.

In order to facilitate a positive relationship, you must treat your PCA with respect, and be as flexible as possible. Keep in mind that he or she has responsibilities and commitments outside of providing your personal care. Respect his or her privacy and base your relationship on honesty, mutual respect and open communication.

Giving (and receiving) feedback is an important aspect of the relationship between caregiver and employer. When it becomes necessary to give critical feedback, make it as positive and constructive as possible. Although it can be difficult, give the feedback immediately after your PCA performs the task or exhibits the behavior you are criticizing. Give feedback on only one incident at a time, and provide feedback on the person's actions, not the person. Make sure you use the opportunity to help your PCA do the job more effectively rather than launching a personal attack. After giving critical feedback, be sure to clarify how you would like the task performed or the situation handled in the future.

Your style of communication can also be an important factor in maintaining a comfortable working relationship with your caregiver. Utilizing an assertive rather than an aggressive style will foster open communication. An assertive person is open to feedback from others, is direct and gives clear messages. The assertive individual is also honest with him or herself and also with others. Aggressive behavior does not show consideration for the feelings of others and tends to shut down the lines of communication.

Your lifestyle may differ from that of your personal care assistant. You may have differences of opinion over something as minor as which television programs or music you prefer, or over major issues such as smoking, drug and/or alcohol use. Consider your tolerance level for such behavior and make your stand clear. If you do not want someone to smoke in your home, for example, ask your PCA to smoke outside. Do not allow drinking or drug use to interfere with your PCA's ability to meet your needs and perform the job.

In order to provide an optimal working environment for your PCA and foster a positive relationship, there are several things to keep in mind when you interact with your caregiver. You do need to establish your position as employer as soon as possible to ensure that your needs will be met in the manner that you would like. However, keep in mind that the job of providing personal care is not easy, and try not to be too demanding. It is important to be kind and courteous when you ask for assistance. When communicating your needs try putting yourself in your caregiver's place, and think about how you would want someone to talk to you. It is upsetting to be taken for granted, so try to show your appreciation by thanking your PCA.

Being organized will benefit yourself as well as your attendant. Make a list of the tasks you need to have done each day of the week. This makes the best use of the time you have with your caregiver and forces you to anticipate your future needs in terms of daily activities and errands. Think about things like grocery and errand needs - which day you plan on shopping and when. Do you need assistance with your laundry and when does it need to be done? Are you able to do your bowel program in the evening so as to lighten up the morning activities? When you organize your needs and prepare for the week, you communicate respect for your PCA's time, and both of you are likely to get more done with the time you have together.

Unfortunately, it is possible that the person you selected to be your caregiver may not actually be a good match for you or is unable to meet your needs for whatever reason. If this is the case, it is always preferable to part ways on the best possible terms, as you may want to use your PCA as a back-up caregiver in the future (if the circumstances allow). Make sure your PCA returns your housekey and any other personal effects. Get a forwarding address and phone number if possible, in case you need to contact him or her in the future.

Whether your caregiver is terminated or leaves for his or her own reasons, you will once again need to start the process of finding someone to provide your care. It is preferable to start this process while your PCA is still with you. However, this is not always possible, as many times, the caregiver leaves with little or no notice. This is why it is important to have back-up care in place. Hopefully, the knowledge gained through the experience of hiring and managing your first PCA will make the process of finding a replacement caregiver easier.

## **Funding Issues and Resources**

There are programs in existence that provide funds to help pay for attendant care. Participation in such programs depends on specific eligibility requirements that vary from area to area. It is important to meet with a social worker, case manager, independent living advocate, or other professional to discuss your specific needs and whether or not you may be eligible to receive funds.

Keep in mind that most programs only provide minimum wage for personal care assistants, and it is difficult to find and retain a personal care assistant for

minimum wage, due to the nature of the work. Consider supplementing the minimum wage with additional money, in order to pay your PCA a salary comparable to the going rate in the area. If this is not possible, consider providing other benefits such as room and board, in addition to the cash wage.

Listed below are possible resources to explore for funding personal care:

### **Private Resources**

- Health Insurance
- Auto Insurance
- Workers Compensation

### **Public Resources**

- Medicaid (Department of Social and Health Services)
- Department of Vocational Rehabilitation
- Department of Veterans Affairs (if you are a veteran)
- Crime Victims Compensation
- Other State-funded programs

It is important (and a requirement for most funding sources) to keep a record of the hours your PCA works. This is best done by keeping a timecard (see



sample). Also, as an employer, you are responsible for paying Social Security and other employer taxes. If you are receiving funds from an outside source to pay for attendant services, follow the agency's guidelines regarding the records you need to keep, how your attendant will be paid, and the taxes you are responsible for withholding and paying.

# Samples

Please use the following samples/templates/check lists to assist you with the hiring of a Personal Care Assistant. Please reach out to local organization that will be able to provide further assistance.



**THE REHABILITATION CENTER**  
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# Personal Assistant Services

## Job Description

When writing a description of the tasks for which you require assistance, think about how frequently the activity needs to be done, the physical requirements of the task, and the time of the day/week the activity is typically done.

Bathing: \_\_\_\_\_

\_\_\_\_\_

Dressing: \_\_\_\_\_

\_\_\_\_\_

Assistance with Bathroom Transfers: \_\_\_\_\_

\_\_\_\_\_

Bladder Care: \_\_\_\_\_

\_\_\_\_\_

Bowel Care: \_\_\_\_\_

\_\_\_\_\_

Transfers: \_\_\_\_\_

\_\_\_\_\_

Exercises/ROM Program: \_\_\_\_\_

\_\_\_\_\_

Meal Preparation: \_\_\_\_\_

\_\_\_\_\_

Housekeeping/Laundry: \_\_\_\_\_

\_\_\_\_\_

Grocery Shopping: \_\_\_\_\_

\_\_\_\_\_

Correspondence/Finances: \_\_\_\_\_

\_\_\_\_\_

Other Needs (medical appointments, school, social,  
job, etc): \_\_\_\_\_

\_\_\_\_\_

Transportation: \_\_\_\_\_

\_\_\_\_\_

## **Personal Assistant Services**

### **Advertisements for Personal Care Assistant**

Live-in companion needed to share home with man with quadriplegia in Santa Cruz. Personal care, cooking, yardwork & cleaning assistance in exchange for private room, board and \$500.00 per month. Contact Mark at (831) 555-8527 weekdays.

Live-in companion sought to share home in a quiet setting with female with a disability. Room, board and salary in exchange for help with house, meals and errands. Two days off per week. Call Freddy at (408) 289-9989.

Part-time skilled personal care attendant sought for weekday mornings. Non-smokers only, 15 hours per week. \$15 hour. Contact Connie at (408) 879-3434 weekdays.

Live-in attendant needed for college student. Must be willing to do personal care. Flexible hours, good salary, split household expenses. Contact Jerry at (415) 659-7856 evenings.

Aide to assist man with a disability with daily activities. Must be able to drive and cook. 4 hours per day, \$15.00 per hour. References required. Contact Rudy at (510) 987-3478 weekday evenings.

Flexible hours/room and board plus stipend for mature responsible female student to assist disabled student with self-care activities - personal care involved. Call Lisa at (408) 237-5498.

Disabled female needs dependable, intelligent personal care assistant. Pleasant surroundings, must like dogs. Hours negotiable. Personal care involved. Call Maureen at (415) 555-3298.

# Personal Assistant Services Attendant Application

## Applicant Information

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

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

City/State: \_\_\_\_\_

Zip Code: \_\_\_\_\_

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

E-mail: \_\_\_\_\_

How long have you lived at this address? \_\_\_\_\_

In case of an emergency, notify? \_\_\_\_\_

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

Relationship to applicant: \_\_\_\_\_

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

## Job Experience

Have you had previous experience working as a personal care assistant, nurse or nurse's aide? Yes \_\_\_\_ No \_\_\_\_

If yes, please describe your job duties:

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How long were you employed in this capacity? \_\_\_\_\_

Please list 2 previous employers to be used as a references:

Employer Name \_\_\_\_\_

Street Address \_\_\_\_\_

City/State \_\_\_\_\_

Zip Code \_\_\_\_\_

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

Dates employed: \_\_\_\_\_ through \_\_\_\_\_

Employer Name \_\_\_\_\_

Street Address \_\_\_\_\_

City/State \_\_\_\_\_

Zip Code \_\_\_\_\_

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

Dates employed: \_\_\_\_\_ through \_\_\_\_\_

### **Availability**

Date available to start work: \_\_\_\_\_

Shifts willing to work: Full time\_\_\_\_ Part Time\_\_\_\_

Mornings: \_\_\_\_\_ Afternoons: \_\_\_\_\_ Evenings: \_\_\_\_\_

Overnight: \_\_\_\_\_ Live-in: \_\_\_\_\_

On-call for emergencies : \_\_\_\_\_

How many hours per week are you willing to work? \_\_\_\_\_

What time would you be able to start in the morning? \_\_\_\_\_  
How late could you stay in the evening? \_\_\_\_\_

If you are a student, what is your schedule?

Monday: \_\_\_\_\_ Tuesday: \_\_\_\_\_ Wednesday: \_\_\_\_\_  
Thursday: \_\_\_\_\_ Friday: \_\_\_\_\_

### **Other information**

What is your means of transportation? \_\_\_\_\_

Do you have a valid drivers license? Yes \_\_\_\_ No \_\_\_\_

Have you been convicted of a felony, misdemeanor or other offense within the past 10 years ? Yes \_\_\_\_ No \_\_\_\_

If yes, explain:

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Are there any jobs that you would not want to do (for example, drive, bowel and/or bladder care, lifting, or other duties listed in job description?)

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How did you hear about this position? \_\_\_\_\_



# Personal Assistant Services Attendant Rating Sheet

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

Prospective Attendant's Name: \_\_\_\_\_

Male \_\_ Female \_\_

Age: \_\_\_\_\_

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

Email: \_\_\_\_\_

## Overall Impression of Prospective Attendant:

Positive Attributes: \_\_\_\_\_

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Areas of Concern: \_\_\_\_\_

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## Physical Requirements:

\_\_\_\_\_ Good Health

\_\_\_\_\_ Physical Stamina

**Qualities:**

\_\_\_\_\_ Dependability  
\_\_\_\_\_ Attitude  
\_\_\_\_\_ Patience  
\_\_\_\_\_ Learning Ability  
\_\_\_\_\_ Neat Appearance

\_\_\_\_\_ Punctuality  
\_\_\_\_\_ Intelligence  
\_\_\_\_\_ Honesty  
\_\_\_\_\_ Compatibility

**Capabilities to Look for:**

\_\_\_\_\_ Ability to drive  
\_\_\_\_\_ Personal Care  
\_\_\_\_\_ Language

\_\_\_\_\_ Cooking & Cleaning  
\_\_\_\_\_ mechanical abilities  
\_\_\_\_\_ Ability to lift/transfer

**References:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Experience:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Availability:**

\_\_\_\_\_

**Other Comments:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Personal Assistant Services Needs Inventory

## Personal Care Needs:

### **Bathing:**

- Type of Bath (shower bath, set-up) \_\_\_\_\_
- Frequency \_\_\_\_\_
- Time of Day \_\_\_\_\_
- How long does it take \_\_\_\_\_

### **Dressing:**

- Level of Assistance \_\_\_\_\_
- Special Considerations \_\_\_\_\_
- How long does it take \_\_\_\_\_

### **Oral Hygiene:**

- Frequency \_\_\_\_\_
- Type of assistance required \_\_\_\_\_

### **Bowel Care:**

- Type of bowel program (in bed, on commode, etc) \_\_\_\_\_
- Frequency of bowel care \_\_\_\_\_
- Time of day \_\_\_\_\_
- How long does it take \_\_\_\_\_

## **Bladder Care:**

- Type of bladder program (ICP, condom cath, suprapubic) \_\_\_\_\_
- Frequency of bladder care \_\_\_\_\_
- Time of Day \_\_\_\_\_
- How long does it take \_\_\_\_\_

## **Transfers:**

- Type of transfer (dependent sliding board, etc) \_\_\_\_\_
- Amount of assistance required \_\_\_\_\_
- When needed \_\_\_\_\_
- Special considerations (shoulder pain, special techniques) \_\_\_\_\_

## **Eating:**

- Other than meal preparation, any special help (adaptive equipment; set-up) \_\_\_\_\_
- Special diet \_\_\_\_\_

## **Medication:**

- Type of medications \_\_\_\_\_
- Frequency \_\_\_\_\_
- Who Administers \_\_\_\_\_

## **Exercise Program:**

- Type of exercise program (ROM, strengthening, etc) \_\_\_\_\_
- Frequency \_\_\_\_\_
- How long does exercise program take \_\_\_\_\_

## **Homemaking Needs:**

### **Laundry:**

- Level of assistance required \_\_\_\_\_
- How often \_\_\_\_\_
- Where is laundry done \_\_\_\_\_

### **Housecleaning:**

- Frequency \_\_\_\_\_
- How many rooms need to be cleaned \_\_\_\_\_
- Specific Chores \_\_\_\_\_

### **Meal Preparation:**

- Time of meals \_\_\_\_\_
- Who will plan \_\_\_\_\_

### **Grocery Shopping:**

- Frequency \_\_\_\_\_
- Where is shopping done \_\_\_\_\_
- Who is responsible \_\_\_\_\_

# Personal Assistant Services Checklist for Self-Care Activities

## Checklist for Bathing

### **Preparation:**

- 1. Get clothes ready
- 2. Prepare bath water
- 3. Check bathroom temperature
- 4. Make sure needed supplies are available
- 5. Ensure Privacy

### **Routine:**

- 1. Assist with clothing removal
- 2. Transfer from bed to bath
- 3. Wash and rinse body
- 4. Assist with hair care
- 5. Transfer from bath to dressing area.
- 6. Dry body thoroughly
- 7. Inspect skin for pressure sores
- 8. Apply lotion or powder
- 9. Apply deodorant and makeup and/or shave
- 10. Assist with dressing
- 11. Assist with bladder and bowel care
- 12. Transfer to wheelchair
- 13. Assist with dental care
- 14. Move to breakfast area

## **Clean up:**

- 1. Put away all supplies
- 2. Clean bathroom
- 3. Clean and disinfect bladder and bower care supplies

# Personal Assistant Services

## Personal Care Assistant Agreement/Contract

1. **Parties:** The parties to this agreement are \_\_\_\_\_  
(employee), who will be responsible to  
\_\_\_\_\_(employer). Both parties agree to assume the  
duties and the responsibilities of the employer-employee  
relationship as described in this agreement.
  
2. **Place of Employment:** Employee's duties shall be primarily  
carried out at the employer's residence, but may involve local  
travel for medical appointments, shopping and similar  
purposes.
  
3. **Hours of Employment:** Regular days and hours shall be:  
  
\_\_\_\_\_  
  
\_\_\_\_\_

It is understood that these days and/or hours may change. Any  
permanent change must be noted in writing and initialed by  
both parties.

  
4. **Pay Schedule:** Employer agrees to pay employee at the  
rate of \$ \_\_\_\_ per hour/day/week/month. Payday will be on  
the \_\_\_\_\_ day of the day/week/month. Reimbursement for  
mileage for use of employee's car shall be at the rate of \_\_\_\_\_  
cents per mile. Payment will be made by cash/check or other  
agreed format.



5. **Employee Duties:** Employee's duties are for the benefit of the employer only, not for other household members (unless otherwise contracted). The employee shall perform only listed duties on a regular basis.
  
6. **Supervision:** Supervision and direction of employee shall be the sole responsibility of the employer, unless otherwise agreed to in writing. **Special medication shall be under the direction of a physician.**
  
7. **Expertise:** It is understood that the employee has no special medical knowledge or skills unless otherwise stated in advance, and is not responsible for professional nursing service.
  
8. **Termination:** Either party may terminate this agreement with two weeks notice in writing. Any wages and/or reimbursement due will be paid on termination if at the instigation of the employer; and on the next regular payday if instigated by the employee.
  
9. **Vacation/Sick Leave:** Employee will request vacation time (not to exceed two weeks per year) at least two weeks in advance to allow the employer to arrange coverage. In the event that the employee is sick, he or she will notify employer at least one hour prior to the start of the shift, except in the event of an emergency.

Agreement signed on: \_\_\_\_\_

Employer Signature: \_\_\_\_\_

Employee Signature: \_\_\_\_\_

# Personal Assistant Services Attendant Timesheet

Name: \_\_\_\_\_  
Month: \_\_\_\_\_ Year: \_\_\_\_\_

Date	Time In	Time out	Hours Worked

Total Hours Worked : \_\_\_\_\_

Attendants Signature: \_\_\_\_\_

Employer's Signature: \_\_\_\_\_

# **Personal Assistance Services Resources for Attendant Care**

(please check for local listings)

## **Federal Resources**

Internal Revenue Service

(IRS – Income Tax)

[Internal Revenue Service | An official website of the United States government \(irs.gov\)](https://www.irs.gov)

Social Security

(Health And Human Services)

Information on required deductions for employee and contributions by employer.

[The United States Social Security Administration | SSA](https://www.ssa.gov)

## **State and Local Resources**

Franchise Tax Board

(Income Tax)

Required Reductions from employee, W4 form.

[Franchise Tax Board Homepage | FTB.ca.gov](https://ftb.ca.gov)

Labor Commission

(Industrial Relations Department)

Information on codes and regulations governing household employees.

[Division of Labor Standards Enforcement \(DLSE\) \(ca.gov\)](https://www.dir.ca.gov)

## Workers' Compensation

Required contributions by employers.

[DWC homepage \(ca.gov\)](#)

## Employment Development Office

(Unemployment Office)

Provides information on required contributions by employee for State Disability Insurance (SDI) by employer and for unemployment insurance.

[Employment Development Department | California](#)

## In Home Supportive Services

The In-Home Supportive Services (IHSS) program helps you to stay safe while you live in your own home. Get services in your home, hotel, or the home of a family member. IHSS is different from nursing homes or board and care homes, because you can stay in your own home. If you get Supplemental Security Income (SSI) or qualify for Medi-Cal, you may be able to get IHSS.

[In-Home Supportive Services - Social Services Agency - County of Santa Clara \(sccgov.org\)](#)

## Local Independent Living Centers

Advocacy and help with Personal Care attendants

[California State Independent Living Council | To create policy and systems change for independent living.](#)

Santa Clara Valley Medical Center's, Peer Support Program  
Information and resources.

[Peer Support - Santa Clara Valley Medical Center - \(scvh.org\)](#)

Check with Your Private Insurance Agent or Case Manager to determine if you have any compensation benefits or if your Homeowner's Insurance policy covers on-the-job injuries for your personal care assistant.

# Recognizing and Reporting Abusive Conditions

## What is Abuse?

Abuse happens to people of all ethnicities and income levels and can be physical, sexual or emotional in nature.

- Abuse - the infliction of physical, sexual, or emotional injury or harm including financial exploitation by any person, firm, or corporation.
- Neglect- the failure to provide services to an eligible adult by any person, firm or corporation with a legal or contractual duty to do so, when such failure presents either an imminent danger to the health, safety, or welfare of the client or a substantial probability that death or serious physical harm would result.
- Financial Exploitation - A person commits the crime of financial exploitation of an elderly or disabled person if such person knowingly and by deception, intimidation, or force obtains control over the elderly or disabled person's property with the intent to permanently deprive the elderly or disabled person of the use, benefit or possession of his or her property thereby benefiting such person or detrimentally affecting the elderly or disabled person

## Who can Report Abuse?

Anyone who suspects someone is being abused, neglected, or exploited can make a report. Certain professionals, however, are mandated by law to report.

## Report Abuse

- Child Protective Services (CPS) Hotlines: CPS Hotlines for all 58 counties in California. Information on how to report child abuse or make complaints.
- Adult Protective Services (APS): Each county has an APS agency to help elder adults (65 years and older) and dependent adults (18-64 who are disabled) when they are unable to meet their own needs, or are victims of abuse, neglect or exploitation. Contact your County HOTLINE.
- California Family and Domestic Violence Referral Directory: This publication lists county-specific resources for family and domestic violence: Domestic Violence and Sexual Assault Hotlines, Domestic Violence Shelters, Domestic Violence Programs, Counseling Services for Victims, Counseling Services for Batterers, Victim Services, Legal Services, District Attorney, Victim/Witness, Sexual Assault, Child Abuse, and Elder Abuse.
- Child Welfare Services Complaints: The Children & Family Services Division is responsible for providing statewide oversight of county Child Welfare Services (CWS) programs. If you suspect that a child's health or safety is jeopardized due to abuse or neglect by parents or other caretaker who has custody of the child, contact the appropriate Emergency Response Hotline Number For County Child Protective Services to report the details.
- Child Abuse Prevention Services: The Office of Child Abuse Prevention funds and coordinates local services that help

strengthen and preserve families; develops and distributes information to individuals and organizations; and administers state and federal grants and the State Children's Trust Fund.

- Child Protective Services: CPS is the major system of intervention of child abuse and neglect in California. Existing law provides for services to abused and neglected children and their families, with the goal of keeping the child in his/her own home when it is safe, and when the child is at risk, to develop an alternate plan as quickly as possible.
- The Social Security Administration (SSA), Office of the Inspector General (OIG), Fraud Hotline provides an avenue for reporting fraud, waste, and abuse within SSA's programs and operations.

### **24 Hour Abuse Hotline:**

**{800} 414-2002 or (408) 975-4900**

**(408) 975-4910 fax**

This information was obtained from the California Department of Social Services and from the Missouri Department of Health and Senior services.

# **Terminating your Personal Care Attendant**

## **Setting Up the Termination Meeting**

If you need to fire or lay off someone, it should always be done face-to-face. Never fire or lay off by letter or over the phone. Early in the day and early in the week is generally considered the best time to hold a termination interview.

Avoid Fridays and the day before a holiday or vacation. An employee who is let go on a Friday has two days to brood about his or her treatment by the employer and to look for ways to retaliate. Firing a person early in the week gives him or her the opportunity to focus on the future and begin looking for a new job right away.

Also, you won't have to spend the weekend with the bad memory of a distasteful task on your mind.

For similar reasons, the discharge should be conducted early in the day. People are fresher, more rested and better able to deal with adversity and stress earlier in the day. People tend to be tired and short-tempered later in the day, which may increase the chance for an unpleasant reaction to bad news. Also, discharging earlier in the day allows you to get back into the work routine and overcome any unwarranted guilt that may exist for having to fire an employee.



## Termination Meeting Checklist

Conduct the meeting in a sequence as follows:

1. Tell your attendant the purpose of the meeting. Although the reason for termination should be communicated, there is no need to go through a step by-step analysis of the documentation supporting the reason for discharge.
2. Advise that the decision is final and cannot be reversed.
3. Emphasize that all relevant factors were reviewed.
4. Tell your attendant the effective date of the termination.
5. Review with your attendant a written summary of benefits, if any
6. Have final paychecks ready. If your attendant is to leave immediately, have any final checks, benefits or vacation payments prepared and inform the employee how to collect his or her personal belongings and leave the premises.
7. End the interview by saying that your attendant will be notified if there are any other matters that must be dealt with. (Just in case something comes up in the future.)
8. Wish your attendant good luck and express confidence in his or her future.

Information from "A handbook for accessing and using Personal Care Attendant Services" by the Alabama Council for Developmental Disabilities



**THE REHABILITATION CENTER**  
AT SANTA CLARA VALLEY MEDICAL CENTER  
BRAIN INJURY | SPINAL CORD INJURY | STROKE