Training a Person with a Disability to use PAS

by: Jeanette Strong

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RECRUITMENT TIPS -

Recruitment of personal assistants (PA) is an ongoing process for many persons with disabilities. Because of low pay, lack of benefits (in most cases) and few chances for promotion, turnover of PAs can be quite high. By casting a wide net, qualified applicants may be found who become longer-lasting assistants.

ADVERTISING FOR A PA

How to advertise is as important as where to advertise. When writing ads, be brief and to the point. If any inducements such as higher pay are being offered, emphasize that in the first line of the ad. Do not include your home address to insure safety and to avoid having people show up to check on the job. Interview applicants at your place of employment.

ADVERTISEMENT GUIDELINES

Give the following information:

- ▶ brief description of duties (without being too technical);
- your telephone number;
- ▶ work hours required; and
- ► experience or qualifications (driver's license, medical certification, skills specific to helping employee at the workplace, etc.)

There are numerous places to look for personal assistant applicants. Here are some examples:

- 1. <u>Agencies for persons with disabilities</u> -- Most independent living centers offer information and referral services and have a registry of potential personal care assistants. Some referrals will have experience working as PAs for persons with disabilities; however, it is up to the employee to screen applicants and train the PA.
- **2.** Classified ads in local or college newspapers or shoppers -- Many persons with disabilities feel that placing classified ads is the best way to recruit assistants. Contact your local newspapers and compare prices. Keep your message short and to the point.

- **Bulletin boards: college dorms or libraries, laundromats, apartments, YMCA/YWCAs, etc.** -- Posting on bulletin boards is a great, free way to recruit PAs. If possible, post your ad at your place of employment. Write or type the ad clearly in print large enough to be seen from a distance.
- **4.** <u>Colleges and universities</u> -- Personal assistant work can be well suited to college students' schedules. Post your ad on their bulletin boards, advertise in their newspaper, or call the college placement office to ask for referrals. Colleges that train health care professionals (occupational and physical therapists, nurses, *etc.*) can be a source of applicants.
- **5.** Local employment office (Workforce Development, Manpower) -- Many people who are out of work check for available jobs at an employment office. Call your local employment office and ask to list your job opportunity.
- **Senior Citizen groups** -- Some individuals have reported that they have found PAs through local agencies that find jobs for retired senior citizens. These agencies differ from city to city. Call your local Council on Aging, Association of Retired Persons, or other senior citizen groups to locate the appropriate agency in your area.
- **7.** Word of mouth disabled peers. Peers using PAs can recommend good assistants.
- 8. Other places to advertise -- Newsletters from hospitals & civic organizations Church bulletins: Call your minister or rabbi to post an ad Other community groups (social, political, volunteer or civic) may have a pool of applicants, or may be able refer you Support groups for persons with disabilities.

SAMPLE ADS THAT FOLLOW GUIDELINES

- ▶ Blind man wishes to hire reader/driver for paperwork and errands. Must have own vehicle. Call Pat @ 123-4567.
- ▶ Wanted: personal care assistant for male with a disability needing assistance at work. Call Elvis @ 123-4567.

Sample Ads that DO NOT follow Guidelines

- ▶ Minimum wage position, no benefits. Evenings and weekends required. Must be able to operate Hoyer lift. Call 123-4567.
- ► Caregiver needed immediately to care for CP adult. Minimum wage. Medically trained only need apply. Call 123-4567.

- WHERE TO LOOK FOR PAS
- ► Agencies for people with disabilities,
- ► Classified ads,
- **▶** Bulletin boards,
- ► Colleges,
- **▶** Employment office,
- ► Senior citizen groups, and
- **▶** Word of mouth

► WRITING A CONTRACT

Contracts are an important management tool. They specify employee behaviors and set up clear guidelines that outline the responsibilities of both the employer and employee. The employee may need to develop an employment contract to clarify duties. A written contract makes it easier to maintain an effective and long lasting working relationship with the workplace PA. A contract should include:

- duties in specific areas;
- ▶ the number of hours and schedule;
- ▶ wages: hourly, by job, mileage rate;
- supervisor;
- 2 weeks notice, for leave;
- confidentiality requirements;
- ▶ limits on work behavior, absenteeism, tardiness, phone usage, and dress code;
- notice for emergencies;
- ▶ social limits (i.e., smoking, alcohol use, swearing);
- contract employee status; and
- signatures, dated.

PAY RATES

Pay rates vary from company to company, consumer to consumer, and task to task. For a guideline of competitive rates, your local independent living center should be consulted. Some employers give a raise for satisfactory performance on an anniversary date. Some give bonus pay or paid time off for perfect attendance. Others reward longevity or superior performance by paying tuition for expanded training for the personal assistant. When a company and an employee are sharing the salary of the PA, raises and rewards should be planned together.

Compensation can vary depending on the task, experience/skill level of the PA, and the time of day the PA is needed. A pay differential for evening work or more difficult tasks may encourage assistants to perform tasks in a timely manner. People who hire drivers pay a mileage rate only while the individual is being driven somewhere. Mileage rates vary, as do hourly rates. Don't be afraid to negotiate.

A completed sample contract is presented on the following page. It is meant to only serve as a guide because contracts must fit individual circumstances.

◆ Managing a Personal Assistant -

The training program is a critical component in personal assistance management. Management skills contribute to continued success in hiring, training, and retaining reliable, conscientious PAs. In the event that a PA does not stay, a well managed working relationship will give valuable skills for future hiring or supervising situations.

Attempt to create an environment where the PA's best traits will flourish. While it may not be easy to establish good communication, time invested in this process will pay off with a PA who is motivated.

Personal assistance management may seem complicated, but with some planning and perseverance, it can be accomplished. Remember: other persons with disabilities have been effectively hiring and managing personal assistants for years. Be ready to communicate job activities to the PA along with the time of day specific tasks are to be completed. Everyone learns differently, so do not rely on only one method of training. Do not end up on the floor because an assumption was made that the assistant knows how to do a transfer.

Periodically during the training, take time to stop and ask the assistant questions to assess understanding of the procedures. Do not expect a PA to be able to perform routines the first time. Setting up a good working relationship with the assistant starts with making expectations clearly understood from the beginning. The training period is the time to lay important ground rules for necessary behaviors and to set the tone for the relationship. The process of training someone involves patience and the ability to break tasks down into small, easily understood units that can be communicated to another person.

FEEDBACK/CONSTRUCTIVE CRITICISM

The most important part of managing assistants is providing feed-back—both praise <u>and</u> constructive criticism. Research has shown that job performance improves and remains high when employees receive positive feedback on jobs they perform well. The training period gives ample opportunity to solve small problems before they become too big. Feedback makes the assistant aware of his/her performance and needed adjustments. Constructive feedback guidelines are as follows:

1.	Give feedback as soon as a problem occurs.	Prompt feedback lets
	the PA know how he/she is doing after an act	ivity.

- 2. Be specific. Explain the parts of the task that were done well, what needs improvement, and how to improve performance.
- 3. Don't bring up incidents from the past. Deal with issues as they occur. Focus on the performance, not the person or personality.
- 4. Give feedback to provide information, not to criticize. Coach, don't command.

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<u>SAMPLE CONTRACT</u>: This is a legally binding document. Be sure you understand everything in this contract BEFORE you sign it.

The assistant will perform the following services for the person with a disability. Activities include, but are not limited to: preparing for work, workplace activities of daily living, equipment set up, communication assistance, mobility assistance, office duties, transportation.

Assistant will be supervised by and is wholly responsible to the person with a disability.

Assistant will respect the confidentiality of the person with a disability.

Assistant will complete duties by the agreed-upon time.

Three absences without prior notification and/or three tardies will result in termination.

Assistant will work Monday through Friday from 7:30 am to 5:00 pm on days when the person with a disability regularly reports to his/her place of employment. (Excludes state holidays.)

Assistant will take breaks with the person with a disability and will have an unpaid lunch hour that will be taken before or after the person with a disability's lunch time.

The person with a disability will pay the assistant an hourly wage of \$8.00 semi-monthly on the 15th and the last day of the month.

Transportation with or for the person with a disability will be reimbursed at the rate of \$.30 per mile if the assistant uses his/her own vehicle. The assistant agrees to use the employer's vehicle ONLY for business purposes.

Salary does **not** include paid vacation or sick leave.

In an emergency, the person with a disability and the assistant will notify the other as soon as possible.

Assistant will be notified three times of unacceptable behavior before being terminated, unless such behavior endangers the person with a disability's health or safety, in which case the assistant will be terminated without notice.

Each party will give two weeks notice before terminating this contract.

The	ass	istant i	s wo	rkir	ng as an	indepe	ndent con	trac	tor and is	s solel	y respo	nsible	for ke	epin	g ad-
equa	te	records	and	ma	king tax	and ot	her payme	ents	related to	contr	act. /	Assista	nt ackı	nowl	edges
that	no	money	will	be	withheld	by the	employer	for	payment of	of assi	stant's	local,	state,	or fe	ederal
taxes	S.														

Signature of the person with a disability	Date
Signature of the assistant	Date

- 5. Balance praise and criticism. Give as much praise as possible. The assistant is often making valuable contributions; mention those first.
- 6. Rehearse your message; before delivering it.

FEEDBACK

- **▶** Give feedback promptly.
- ► Coach, don't command.

▶ Be specific.

- ▶ Balance praise and criticism.
- ► Don't bring up incidents from the past.
- **▶** REHEARSE

POSITIVE REINFORCEMENT

Honest appreciation of services rendered is valued by everyone. The more specific the praise, the greater the impact.

It can be difficult to give negative feedback. Try hard to think about the consequences of <u>not</u> giving feedback. Generally, that translates to unmet workplace needs and sloppy or incomplete work being accepted from the assistant. A work supervisor may see these problems as reflection of the employee's inability to perform the duties of the job.

No one learns by hearing "You did a terrible job!" If the PA performs only one part of a task incorrectly, it is a good to mention first what was done correctly. Point out positive aspects as well as areas that need improvement.

EXAMPLES OF **P**OSITIVE **R**EINFORCEMENT **S**TATEMENTS

- ► "I really appreciate all your hard work."
- ► "You did a great job taking notes in the meeting. They will be very helpful."
- ► "You did a good job taking notes. Next time don't gossip with Mary."

SCHEDULING PA WORK HOURS

Scheduling is an important employee management skill. Not only are there numerous ways to make schedules, each can be customized to meet individual needs. While these schedules may seem like a lot of paperwork, they contribute to a good working relationship with a workplace PA. Well planned schedules insure effective coverage of needed areas of assistance and make it easier to explain the position to a new PA or applicant. Careful preplanning can maximize assistant services and promote a smooth functioning work relationship.

Sloppy or incomplete work from a PA may be seen by a supervisor as poor job performance by the employee.

In making a schedule, first consider how often tasks need to be done, (daily, several times a week, once a week, or only require occasional attention). Then estimate how long each task will take. Tasks that require longer periods of time can be scheduled on alternate days.

Schedules can be arranged to meet learning style, personality, or paperwork needs. Some can serve as a time sheet to tally assistant hours. Others provide for the concise communication of specific details of the position duties and activities. Use the scheduling approach that will be most effective for the situation.

A simple task list arranges duties as they occur throughout the day. A narrative style allows for an informal description of daily activities. Activities can be also arranged in a daily grid. Samples of a service area schedule and schedule grid are provided on the following page.

MAKING SCHEDULES

- How long does each task take?
- ▶ How often does the task need to be done?
- **▶** Group tasks together.

Task Lists

- ► Schedule: weekdays 7:00 8:00 a.m. prepare for work, 8:00 -9:00 a.m. transport, 9:00 11:30 a.m. office duties, lunch and personal care, return at 5:00 6:00 p.m. for transport home.
- ► Personal assistance: medication, transfers, bathing, minimal grooming and hygiene.
- ▶ Office duties: filing, taking meeting notes, equipment set-up, paperwork, business transportation as needed.

EXAMPLE OF A NARRATIVE SCHEDULE

I have MS and use an electric chair. I need assistance getting up in the morning and getting ready for work. A PA should arrive at my house at 7:00 a.m. to enable me to be ready and leave by 8:00 a.m. The PA would drive me to work. From that point until noon the PA would need to be involved with my office duties by taking notes, filing, and performing general clerical duties. After assisting me with lunch, the PA would then be free until it is time to pick me up at 4:30 p.m. The PA will then transport me home and prepare a light meal for dinner. This schedule involves wheelchair assistance and minimal business travel. An occasional overnight is required.

Service Area Hours per Week Schedule Comments prepare for work, transport 5 7 - 8 a.m. minimal assistance required workplace personal cares 5 8 - 9 a.m. medication 2 x daily, assist with lunch

mobility assistance — 5 — as needed — meetings, business travel

-beginning & ----

————mostly p.m. ——paperwork, filing, taking

end of day

-maintenance as needed

meeting notes

equipment set-up — 3 —

_____5 —

office duties —

	Monday	Tuesday	Wednesday	Thursday	Friday
Prepare for Work:					
Dressing —					
Bathing ———			$\overline{}$	$\overline{-}$	
Transfers ———		_ <u></u>	-		
Hygiene ———					
Transportation to and from work					
Office Duties:					
Typing —					
Filing —					
Taking Notes —					
Mailings ———					
Equipment Set-Up ———					

CLARIFYING ON-THE-JOB RELATIONSHIPS

Just like some people hire someone to clean their home, change their oil, or cook their food, persons with disabilities hire PAs to assist with daily living activities. Persons with disabilities direct the actions of their PA, even in cases where they do not directly pay for their services or hold the power to fire.

Personal assistants perform a variety of services in the workplace that may include:

- ► Daily workplace activities: assisting with beverages or food, assisting with lunch, grooming, administering medication.
- ► Equipment set up: technical/electrical equipment such as a wheelchair, closed circuit TV, etc.
- ► Communication assistance: answer phone calls, interpret for person with hearing or speech impairment.
- ► Mobility assistance: guide to meetings, restrooms, etc.
- ▶ Office duties: copying, filing, dictating, handling paperwork, taking notes in meetings, reading documents, opening mail, entering data, keeping workspace organized, preparing mailings.
- ► Transportation: take to and from work.
- ▶ Business travel: make arrangements, handle paperwork, provide transportation, provide guide services on business trips.

A good working relationship between the assistant and the employee receiving PA services includes a clear delineation of the PA's duties. It involves a clear understanding of accountability. For example, in a situation where an insurance company is the employer, the PA would likely be accountable to the employee with a disability for specifics related to the job and to the insurance company's human resource department for overall conduct.

◆ CONDUCTING SEMI-ANNUAL PERFORMANCE REVIEWS _

Setting up a schedule for regular evaluations provides an opportunity to reward good performance and improve poor behaviors. A two-

day trial period provides both parties with an opportunity to determine if the relationship is going to work. The first evaluation can be done at 90 days, then six months, and finally once a year. During an evaluation, ask for the PA's input on what parts of the job he/she likes or dislikes, and suggestions to improve service. An example of a Personal Assistant Evaluation Form is on the following page.

Some people who employ personal assistants do not complete a formal performance review. Instead, they handle problems as they occur.

"I have found it necessary to formally lay out expectations, but have not done a performance review." Mark Jones

"I don't do regular reviews with my assistants, but if there is a problem, we talk about it." Marsha Williams

RESOLVING DISPUTES -

HANDLING CONFLICT

Handling conflict is an important management skill that involves compromise and negotiation. Don't remain silent if the PA's behavior is less than satisfactory. Personal assistants who guit usually identify a lack of communication as the primary reason for leaving. Assistants who are not satisfied with their position cannot reflect positively to coworkers, supervisors, or customers. Here are sample ways to diplomatically resolve conflicts:

- 1. Describe the actions: Don't label, accuse or insult. Avoid making it a personal issue.
- 2. Define the conflict as a mutual problem to be solved, not as a win/lose struggle.
- 3. Be specific in defining the conflict and give possible solutions.
- 4. Discipline tactfully. Maintain a constructive dialogue rather than communication that causes resentment and defensiveness. Tactful discipline is fair, private, and without anger.

LISTENING SKILLS

Employing active listening skills, can result in improved management skills on and off the job.

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- ► Listen consciously without interrupting.
- ▶ Don't think of what to say next. If the listener is focused on a reply, concentration is taken away from the speaker.
- ► Hold discussions in a quiet space at a time when the PA is most capable of communicating.
- ► Provide truthful, accurate information to the receiver. Don't make promises that can't be kept.
- ► It is up to the employee to modify his/her listening behavior, not the PA.

	ASSISTANT EVALUATION FORM ——										
Nar	ne of Assistant:				Date	: —					
1.	Arrives for work when scheduled	almost always	1	2	3	4	almost never				
2.	Follows directions	almost always	1	2	3	4	almost never				
3.	Maintains open communication	almost always	1	2	3	4	almost never				
4.	Treats consumer respectfully	almost always	1	2	3	4	almost never				
5.	Respects consumer's preferences	almost always	1	2	3	4	almost never				
6.	Maintains confidentiality	almost always	1	2	3	4	almost never				
7.	Conscientiously performs routines	almost always	1	2	3	4	almost never				
8.	Handles constructive criticism well	almost always	1	2	3	4	almost never				
9.	Does quality work	almost always	1	2	3	4	almost never				
10.	Shows initiative in handling problems	almost always	1	2	3	4	almost never				
Con	Comments:										

The values, habits, and personalities of the assistant may positively or negatively define the work relationship. Conflict can arise if values are not shared or respected. Prior to making an offer of employment, decide if the PA can be a smoker, someone who drinks socially, someone who curses, or someone with strong political beliefs. These values or habits can interfere with establishing a work relationship. By setting limits on certain social behaviors, problems can be forestalled as an effective and longer lasting working relationship is built.

HOW TO TERMINATE AN ASSISTANT

Specialists in personnel management suggest never firing an assistant in anger. However, if the assistant's behavior endangers health or safety, the assistant should be terminated without notice. <u>Before</u> termination, think through the reasons for dismissal and what backup arrangements can be put in place. Reasons for dismissal might include:

- ▶ drug or alcohol abuse,
- physical abuse,
- sexual harassment,
- **▶** general misconduct: insubordination, breach of contract, unauthorized property use, etc.
- poor performance: repeated warnings about incorrect procedures, excessive tardiness, or absenteeism.

Except in cases where health or safety is endangered, there is a responsibility to give the assistant two weeks notice prior to terminating his/her services. If consistent feedback has been given about problems all along, termination should not come as a surprise. Questions to ask when considering termination include:

- ▶ Does the assistant follow directions?
- Does the assistant interfere with daily activities?
- Does the assistant reflect negatively on the business?
- Does the assistant consistently show up late or not show up at all without notification?

Ending the relationship with an assistant can be the opportunity to improve personal management skills by evaluating what worked and what needed improving. When an assistant resigns, conduct an exit

STEPS TO BETTER LISTENING ———

- **▶** paraphrase,
- maintain eye contact,
- ► ask relevant questions,
- remain calm & non-judgmental, and
- offer reasonable options.

interview to determine what the assistant felt was good and bad about the position and solicit recommendations on how to make improvements. The exit interview may help determine and correct problems before they cause irreparable damage in the next PA working relationship.

Once an assistant has been hired, it is impossible to project how long they will stay. There is no benchmark that represents an official guide to a PA's longevity. Many aides are in transition from one state of life to another. The successful management of your personal and workplace needs is an ongoing process that will usually be in a state of change. Don't get discouraged when things don't work out. Personal assistant management is a delicate balance of authority, responsibility, and friendship that must be fine tuned as situations change. The bottom line must be safety, physical and mental health, and independence.

◆ DETERMINING THE CAPABILITIES OF A NEW PA

New personal assistants should be screened for work-related experience, not just for those skills necessary to get ready for work or transporting to and from work. The assistant who does a good job at home may not be the best person to select for work-related duties. Keep in mind the skills needed in the workplace and hire accordingly. Having a specific set of job duties in mind will assist in hiring and training a personal assistant at work. A personal assistant who does not have good office skills may still be useful at home and/or to keep on a list of emergency backup workplace assistants.

In recruiting a PA for workplace support, look for standard business behaviors: professionalism, good communication skills, respect for authority, and specific job-related tasks such as typing or note-taking skills. Make it clear to the assistant that she/he reflects on the agency or business. One employee always directs his assistant to not violate office confidentiality with "What you see or hear here, stays here."

The level of experience and training can vary considerably among candidates. To determine the capabilities of a potential PA, a skills assessment may include:

- ► Work related history in individual, agency or institutional settings,
- educational history in health care related areas including diplomas, degrees, certifications or related training and course work,

(continued)

- ▶ background in providing support to persons with disabilities,
- ► communications skills (verbal and non-verbal) and active listening skills,
- ability to provide mobility assistance,
- ► familiarity with adaptive equipment: hearing aids, low vision aids, wheelchairs, braces, computer access equipment CCTVs, refreshable Braille, Relay devices, TTYs, etc.,
- ability to safely maneuver wheelchairs on steps, ramps and curbs, and
- ▶ background in basic first aid, CPR.

◆ Understanding Federal & State Reporting Requirements ———

An employer of a PA must generally withhold income taxes, pay social security and Medicare taxes, and pay unemployment taxes on wages paid to an *employee*, unless the PA, works for an *independent* contractor.

When the employee shares in the salary of the PA the following requirements should be set:

- ► the worker must follow your instructions about when and how to work,
- you control the details of how the work is done.
- you provide the training, and
- you set the hours and schedule.

Training of a PA by an experienced employee is an indication that the employer wants the services performed in a particular method or manner. The existence of a continuing relationship between a PA and the person for whom the individual performs services is a factor tending to indicate the existence of an employer-employee relationship. This type of relationship is considered permanent if recurring work is contemplated, even if the services are performed on a part-time basis, are seasonal, or the person actually works only a short time.

An *employee* is usually paid by the hour, week, or month; payment on a commission or job basis customary occurs when the PA is an *independent contractor*.

In recruiting a PA for workplace support, look for standard business behaviors. The right to fire is an important factor, indicating that the person possessing the right is an employer. *Independent contractors*, on the other hand, cannot be fired as long as they produce results which measure up to their contract specifications.

A personal assistant is generally considered an *independent contractor* if:

- you pay them by the job (not by the hour),
- you do not provide benefits,
- the relationship is for a short period of time (not indefinitely), or
- ▶ they work for more than one person, (not just you).

Independent contractors ordinarily use their own methods and receive very limited training from the purchasers of their services.

If a person works for a number of people or firms at the same time, it usually indicates an independent status because in these cases, the worker is usually free from control by the people or firms. It is possible, however, that a person may work for a number of people or firms and still be an employee of one or all of them. Most consumers of PAS reported that their employer paid the withholding taxes since the personal assistant was considered an employee of the business. Some PAs had recently changed from independent contractor status where they had been responsible for withholding their own taxes and were reimbursed for expenses.

♦ SUMMARY -

Learning how to effectively use a workplace personal assistant will enable more persons with disabilities to be successful in employment and to obtain positions more in keeping with their true potentials. The material presented in this chapter is drawn from the suggestions of many persons with disabilities who use personal assistants. These individuals include a woman in a wheelchair who uses a two day trial period technique with potential PAs. The voice of the man who is blind talking about the importance of professional behaviors is represented in the material, as is the man in a wheelchair who uses varying pay rates on weekends. These successful persons with disabilities manage their personal assistants, drivers, readers, and attendants. Their techniques are

gained from personal experience, creative solutions, and learning the hard way how to navigate the mine field of assistant security issues.

Some persons with disabilities enjoy a long working relationship with the personal assistants they employ. The PAs themselves benefit from the association with an employer who offers a wider range of life experiences and enlarged work situations beyond what the PAs might have gained on their own. This synergy is an enlightening aspect of a situation that on the surface may appear to be a simple employer/employee relationship. A successful relationship between an employee with a disability and the workplace personal assistant will aide each in looking beyond disability and towards a more successful use of all the capabilities of both individuals.

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