



Your Guide to Hiring & Supervising Your Own In-Home Worker

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*A Step-by-Step
Guide for
Older Adults &
Their Families*



*Provided in Oregon by Multnomah County Aging & Disability Services and
Washington County Disability, Aging & Veteran Services,
with a federal grant from the Administration on Aging*

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The In-Home Worker Guide

Table of Contents

CHAPTER 1 – INTRODUCTION

1.1 — About this Guide.....	1
1.2 — Symbols in this Guide.....	1
1.3 — Responsibilities as an Employer	2
1.4 — Others in Your Life.....	2

CHAPTER 2 – YOUR NEEDS & YOUR PLAN

2.1 — Determining Your Needs.....	3
2.2 — Who You Need to Hire & What to Budget.....	4

CHAPTER 3 – STEPS TO HIRING

3.1 — Hiring & Managing Worker(s) Yourself	5
3.2 — Steps to Hiring a Worker Yourself.....	7
3.3 — Writing a Job Description & Job Advertisement	8
3.4 — Ways to Find Applicants & Advertise for Them.....	13
3.5 — Having Applicants Fill-out Applications.....	14
3.6 — Interviewing Applicants	16
3.7 — Background & Reference Checks.....	19
3.7 — The Criminal Background Check.....	20
3.8 — Accepting or Declining Applicants	21

CHAPTER 4 – STEPS TO USING AN AGENCY

4.1 — The Role of an Agency.....	23
4.2 — Steps to Using an Agency	24
4.3 — Finding Agencies	25
4.4 — Interviewing Agencies	27

CHAPTER 5 – INSURANCE, TAXES & OTHER CONSIDERATIONS

5.1 — Employer & Home Insurance Policies.....	29
5.2 — Checking Your Auto Insurance Policy	30
5.3 — Using a Payroll Service verses Handling Payroll Yourself.....	31
5.4 — Filing Taxes on Wages Paid to In-Home Workers	32

CHAPTER 6 – SUPERVISING YOUR IN-HOME WORKER

6.1 — Having Your Worker Fill-out an Employment Agreement	35
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Continued On Next Page...

Table of Contents Continued...

6.2 — Training an In-Home Worker	38
6.3 — Time Sheets & Paying Your Worker	40
6.4 — Employee Reviews.....	42
6.5 — Termination & Replacing a Worker	42

CHAPTER 7 — TIPS FOR A HEALTHY EMPLOYER & EMPLOYEE RELATIONSHIP

7.1 — Maintaining Boundaries	43
7.2 — Effective Communication & Resolving Conflicts.....	44
7.3 — Watching Out For Fraud, Theft & Other Problems.....	45
7.4 — Appropriately Rewarding Your Worker for a Good Job.....	46

CHAPTER 8 — PLANNING FOR EMERGENCIES

8.1 — Discussing Emergency Plans	47
8.2 — Weather & Natural Disasters	47
8.3 — Pet Maintenance & Emergencies	48
8.4 — Advance Directives & POLST Form	48

Introduction



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In This Chapter...

- 1.1 – About this Guide
 - 1.2 – Symbols in this Guide
 - 1.3 – Responsibilities as an Employer
 - 1.4 – Others in Your Life
-

1.1 — About This Guide

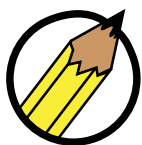
This guide was developed to serve as a guide to hiring and managing in-home workers. Many times our families and friends are not able to provide all of the personal and household care assistance that is needed to help us to remain in our homes. It may be necessary to hire someone to help us. Sometimes that is help to keep the lawn and house maintained or preparing some of our meals. Often as we grow older it is to assist us with more personal needs such as assistance getting in and out of bed or the shower.

1.2 — Symbols In This Guide

To assist in making this guide easy to follow, we developed key symbols that will appear next to important information.



IMPORTANT CONCEPT: The green check is next to important concepts that are essential to understand. If you read nothing else on the page, read this.



TIPS: The yellow pencil is next to helpful tips.



WATCH OUT!: The red exclamation point (!) is next to warnings about common mistakes and cautions. Watch for these and learn what not to do.



EXAMPLES: The blue “EX:” means that this is an example of what to do. You may want to use wording or phrases directly from the examples.

1.3 — Responsibilities as an Employer

As an employer of an in-home worker(s) it is your responsibility to:

- List the tasks you need your worker(s) to complete
- Develop and place advertisements for your in-home worker(s)
- Interview and select your in-home worker(s)
- Complete a letter(s) of hire listing out conditions and wages
- Set duties and train your workers
- Pay workers a fair and legal wage
- Set your workers' schedules in advance and review time sheets to ensure they are correct
- Supervise your workers' daily activities
- Assess the adequacy and quality of your workers' work
 - Ensure a safe work environment
- Develop an emergency back-up plan in case your worker(s) are not available
- Assume responsibility for all required paperwork and adhering to all tax and labor laws or hire a payroll service to handle payment of workers and preparation of related tax forms.



1.4 — Others in Your Life

You may be fortunate to have family and friends who are involved in your life who help with some of your daily tasks and needs. You may want to involve close family members and/or friends in discussing various aspects of planning, hiring and working with your employee(s).

Conflicts can arise between workers and important people in your life, especially when it's not 100% clear who is supervising your employee(s). In most cases, it's best for you to be the one to provide all feedback to your employee(s). If a friend or family member notices work performance that they don't feel is up to their standards, she or he should discuss the issue with you. They should not intervene with your worker directly unless you ask them to. These discussions generally arise from concern for you, but those who care about you should respect how you choose to deal with the issue.

Often people with disabilities and serious health concerns find they must set boundaries with family and friends as well as with employees.



Chapter 2

Your Needs & Your Plan

In This Chapter...

- 2.1 – Determining Your Needs
- 2.2 – Who You Need to Hire & What to Budget



2.1 — Determining Your Needs

As you use the handout “Determining Your Needs”, keep in mind that you want to list all the areas where you need assistance regardless if someone is helping you with that area currently.

For example if your neighbor’s son regularly mows your yard and trims your shrubbery, still list that activity that you need assistance

with. He may be off to summer camp or college and you will need a back-up plan. Similarly if you need

meal preparation assistance and your daughter always brings over dinner on Friday night.

In the handout (at left), list each task, if you are able to do the task yourself or if you need assistance, and who can provide the assistance (family member, friend, or a paid worker). If listing a family member or friend – how often is it reasonable to expect that they can provide the needed assistance once a month, once a week, daily?

You should complete this handout prior to writing your job description.

Forms & Handouts In This Chapter:

- A2 – Determining Your Needs
- B2 – Hiring & Budgeting

HANDOUT A2: Determining Your Needs

Go to the Forms Packet and pull out the form labeled “**HAND-OUT #A2 Determining Your Needs**”.

2.2 — Who You Need to Hire and What to Budget

Who you hire and what you need to pay will depend on the level of skill needed to perform the essential tasks that meet your needs. The more intensive the care needs, the more you may need to pay the worker you hire.

- Domestic services such as housekeeping and companion services are often paid minimum wage and above. You can also use a cleaning service to provided for some of your needs but they are more expensive than hiring a person directly.
- Occasional services such as a neighborhood youth mowing your lawn or feeding your cats when you are out of town do not require you to pay minimum wage.
- If you have need for assistance with personal care such as transfers, bowel or bladder care you may want to hire a CNA (Certified Nursing Assistant) or a person with this specific type of experience.
- Check the local newspaper for the going rate for in-home workers, often labeled as caregivers in help wanted advertisements.

Please see chapter on taxes and insurance for additional information.

HANDOUT B2: Hiring & Budgeting

Go to the Forms Packet and pull out the form that reads “**HANDOUT #B2 Hiring & Budgeting**”. This is a form that will help you plan your budget.



EXAMPLE:

Jim is temporarily using a walker while his broken ankle heals. Jim may have the following entry...

Task: Doing the Laundry (in the basement)

Needs: I can sort and fold the laundry. My worker will take the laundry to basement and run washer, run dryer, and bring laundry upstairs and put it on the dining table for me to fold.

How Often?: Once a week, preferably on Wednesdays.

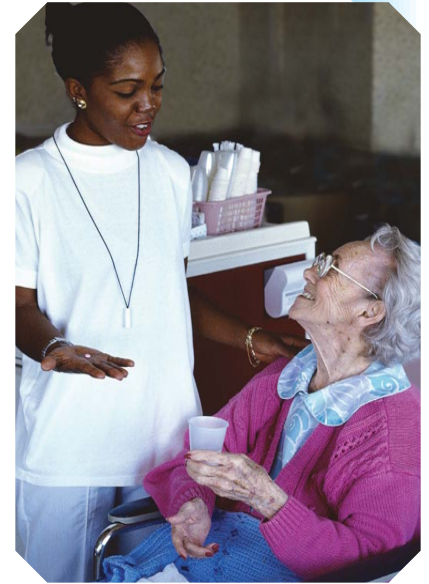
Paid hire?: Yes. My daughter is only able to visit every two weeks, and I need help every week.

Chapter 3

Steps To Hiring

In This Chapter...

- 3.1 – Hiring & Managing Worker(s) Yourself
- 3.2 – Steps to Hiring a Worker Yourself
- 3.3 – Writing a Job Description & Placing an Ad
- 3.4 – Ways to Find & Advertise for Applicants
- 3.5 – Having Applicants Fill-out Applications
- 3.6 – Interviewing Applicants
- 3.7 – Background & References Checks
- 3.8 – Accepting or Declining Applicants



3.1 — Hiring & Managing Worker(s) Yourself

The first thing to consider is that you can hire your workers yourself or you can use an employment agency that will hire for you. There are advantages and disadvantages to both. See Chapter 4 for information about using agencies for hiring and managing for you.



Forms & Handouts In This Chapter:

- A3 – Job Description
- B3 – Employment Application
- C3 – Telephone Interview Notes
- D3 – In-Person Interview Notes
- E3 – Questions to Ask References
- F3 – Criminal History Information Request
- G3 – Hiring Offer Script Form

Advantages & Disadvantages of Hiring a Worker Yourself

You may want to consider the advantages and disadvantages before hiring, as opposed to using an agency.

Advantages

- Self-hiring a worker is likely to be a less expensive option than using an agency
- You can select the worker most compatible with your preferences and needs
- You may be able to hire someone you already know
- There may be greater flexibility in the worker's schedule and responsibilities
- You are more likely to be able to specify how you want services provided
- It may be easier to replace an unsatisfactory worker
- You may hire a worker willing to do pet care or lawn care

Disadvantages

- The time involved in locating candidates, interviewing them and checking references
- You will be responsible for training and supervision
- It will be up to you to develop back-up plans in case of worker absences
- You may have to pay for insurance coverage.
- As the employer, you will be responsible for payroll, including deductions and taxes.



3.2 — Steps to Hiring a Worker Yourself

Below is a list of to-dos to hire. Don't worry - we cover all of these steps and provide forms and information to make it easier. You can come back to this list and use it to check it off.

STEP 1: Determine what tasks you need done

Notes: _____

STEP 2: Write a job description

Notes: _____

STEP 3: Write a help wanted ad

Notes: _____

STEP 4: Find out where to find applicants and post your help wanted ad

Notes: _____

STEP 5: Have the applicant fill out and sign a job application

Notes: _____

STEP 6: Interview the applicants over the telephone

Notes: _____

STEP 7: Interview the applicants in person

Notes: _____

STEP 8: Perform background and reference checks

Notes: _____

STEP 9: Call to offer the job to the applicant, and send denial letters to other applicants.

Notes: _____

STEP 10: Additionally, you will need to set up payroll, taxes and insurance for your worker.

Notes: _____

STEP 11: On the first day, you will have the worker fill out an employment agreement.

Notes: _____

3.3 — Writing a Job Description & Placing an Ad

In order to communicate the duties, qualifications and other aspects of the job, you should create a job description. The description you write is based on your personal preferences and support needs. Include enough detail so that you can assess whether a prospective worker meets your needs. The primary parts of the Job Description are:

A. Job Title: You decide how you wish to refer to your employee(s).



EXAMPLE: Personal Support Worker, In-Home Worker, Personal Aide, or Assistant.

B. Nature of the work: A brief summary of your situation and needs, an overview of when and where work will be performed (only in your home, or if you need employees to drive or escort you outside the home).



EXAMPLE: Elderly woman requires assistance with morning routine, gardening, occasionally driving, shopping, pet walking, and errands.

C. Qualifications: Experience, skills required, and traits of your ideal employee(s).



EXAMPLE: Experience is preferred, but employer is willing to train highly motivated persons who can provide character references to verify the applicant's dependability, honesty, neatness and respect for privacy. The ideal candidate will have a cheerful disposition and love dogs and flowers. English/Spanish speaker a plus.

D. Supervision: Who the In-Home Worker reports to.



EXAMPLE: The In-Home Worker will be working under the direct supervision of the employer.

E. Education: Level of education completed or certificates completed

EXAMPLE: High School diploma or GED preferred, but not required. Completion of Certified Nursing Attendant Program preferred, but not required.

F. Experience: If any preferences in years of experience

EXAMPLE: At least six months to one year of work experience as an In-Home Worker is preferred, but not required.

G. Duties: A list of your support needs, in sufficient detail that applicants can tell you honestly whether they are willing and able to perform the job

EXAMPLE:

1. Assist with housekeeping chores (dusting, cleaning surfaces, loading dishwasher, making bed, laundry)
2. Stand by for safety during shower, assist with towel drying and applying lotion to legs
3. Prepare and serve breakfast, prepare lunch that employer can microwave
4. Accompany employer on dog walking and assist with dog
5. Assist with getting to/from my bed to/from wheelchair, toilet and bath chair
6. Push wheelchair as needed on paved paths surrounding home so that employer can tend to garden
7. Occasionally provide transportation for doctor visits, shopping and errands (requires folding wheelchair and placing in trunk of car)

Continued: Writing a Job Description & Placing an Ad

H. Work policies: State your basic expectations about attendance, punctuality, confidentiality, boundaries, substance abuse, notice required for absences or resignation. If your worker will live in or will be expected to stay overnight occasionally, you will need to describe sleeping quarters, whether meals will be provided, and your policies regarding guests, etc. If you expect the worker to drive you in his/her own car, state requirements for car insurance and valid license, rate per mile reimbursement.



EXAMPLE: Employee is expected to (have):

1. Wear appropriate attire for a worker
2. Report to work each shift at scheduled time, and to inform employer if s/he has a good reason to be more than 10 minutes late
3. Ability to maintain a confidential working relationship
4. Effective written and oral communication skills
5. Ability to follow oral and written instructions
6. Working knowledge of signs and symptoms of common illnesses and conditions
7. Working knowledge of first aid, safety and emergency procedures
8. Maintain appropriate boundaries, not bring personal issues to work
9. Place cell phone on silent except during scheduled break; refrain from text messaging while at work
10. Provide own snacks (coffee and tea will be provided by employer)
11. Respect employer's home as a substance-free workplace
12. Have reliable, insured vehicle, which s/he will use to occasionally drive employer, and accurately record mileage (reimbursed at 40 cents per mile)
13. Give two weeks notice for planned absences or when leaving position

I. Performance Evaluation: How often will performance evaluations be conducted



EXAMPLE: Performance will be evaluated by the employer, based on Employment Agreement Contract, on a monthly basis for the first three months and every 6-months thereafter.

J. Work schedule: Days and times. Describe if the job is “full-time” (40 hours a week) or “part-time” (under 40 hours)



EXAMPLE: Monday – Friday 8:00 AM – 12 noon
(Part Time, weekdays only)

K. Salary: Rate of pay, benefits (if any), payroll schedule



EXAMPLE: \$10.50 per hour, paid on the 10th & 25th of the month for pay periods ending on the 1st & 15th. Employee will be eligible for a performance \$.50/hour raise at 3 and 6 months, with satisfactory performance review

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Job Description Exercise **HANDOUT #A3**

Job Title	
Nature of Work	
Qualifications	
Supervision	
Education	
Experience	
Duties & Responsibilities	
Expectations	
Performance Evaluation	
Work Schedule	
Salary	

Adapted from Personnel Job-Description Service. A Handbook for Hiring and Job-Posting. Job-Description Service, Multnomah County for Workforce Solutions, December 2005.

HANDOUT A3: Job Description

Let’s write a job description. Go to the Forms Packet and pull out the form that reads “**HANDOUT #A3 Job Description Exercise**” and fill out the form to fit your needs. Feel free to copy examples we’ve provided here.

Be sure to also include the Duties & Responsibilities you list here on your final Employment Agreement (#A6). Also, it’s a good idea to have someone read this for spelling and also to ensure that you didn’t miss anything.

3.3 — ...and Placing an Ad

The job advertisement will be a condensed version of the job description that you will use to actually advertise the position. Here are some examples of what one might sound like.

In-home care for senior.

Seeking responsible adult with Certified Nursing Assistant (CNA) certificate to provide personal care and light housekeeping. Must have minimum of one year of relevant experience. References and criminal background check required. \$10.50 per hour to start. Respond with letter of interest and list of experience to Oregonian Box 555, Portland Oregon 97204.

Personal assistance for individual with disability.

Provide housekeeping, meal prep and personal care. One year of experience preferred. References and criminal background check required. \$12.00 per hour. Call 503.444.5555 for more information.



WATCH OUT!

In all cases do not share your home address and it is best not to meet applicants in your home. If you feel comfortable with the applicant and their references check out, then a follow-up interview at your home would be appropriate.



3.4 — Ways to Find & Advertise for Applicants

Ways to Find Applicants

There are a few ways to find applicants.

1. Oregon Home Care Commission Registry & Referral System:

This is a free online service that matches employer needs and preferences to available workers.

Providers on the RRS are authorized to work in the US, are 18 and older, have completed a criminal background check within the past two years, and have updated their profile within the past 60 days. Type <https://www.or-hcc.org> into your browser and then click the blue button in the upper right. For assistance, email OHCC.Registry@state.or.us or call 877.867.0077, Option 1.

2. Bulletin Boards: You can post your job ad on bulletin boards in grocery stores, churches, community centers and other designated public areas.

3. Newspaper & Internet: You can place a job ad in the newspaper or via the Internet. Newspapers have their own job ads section online. *Examples: OregonLive.com, Portland.Craigslist.org, Jobseeker.com, JobDango.com.*

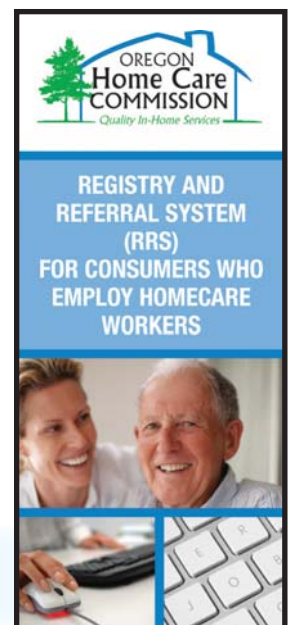
4. Community colleges and universities: Most community colleges and universities have Career Centers where information about available positions in the community can be listed. This could be a great resource, especially if the college has a school of nursing, gerontology program or other programs who work with older adults.



TIP! – If you are having trouble placing an ad, call the Aging & Disability Services Helpline at (503) 988-3646 and one of our helpline staff can discuss options.



WATCH OUT! – If you post a wanted ad to Craigslist, do not post your address or phone number. Craigslist provides a way to have them contact you without using your own email. Be wary of scam artists. If it looks too good to be true, it usually is.



3.5 — Having Applicants Fill-out Applications

You can mail or email the application to the applicants prior to your in-person interview, or you can have them fill out the application in person. You should have them fill this out *before* you sit and speak to them about the job so that you will have it in front of you during the interview. Here are some important things to look for and follow up about...

Some Important Items To Note:

1. Availability: Take note of the applicant’s availability. Is she or he available at the times you will need him or her? You will also want to discuss holidays and emergencies.

Days Available	<input checked="" type="checkbox"/> Mon.	<input type="checkbox"/> Tue.	<input checked="" type="checkbox"/> Wed.	<input type="checkbox"/> Thu.	<input checked="" type="checkbox"/> Fri.	<input checked="" type="checkbox"/> Sat.	<input type="checkbox"/> Sun.
Times Available	8am-3pm		8am-3pm		8am-3pm	12-2pm	

2. Does Citizenship Matter?: State and Federal laws require that a worker be either a U.S. citizen, or authorized to work in the United States. A social security card or green card are presented as proof. You can be fined for hiring an illegal worker, so check their proof.

Are you a citizen of the United States?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	If no, are you authorized to work in the U.S.?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
---	---	-----------------------------	--	------------------------------	-----------------------------

3. What’s an Oregon Provider Number?: This is a 6-digit number that indicates that the worker meets enrollment standards to provide in-home services paid for with state funds. It also means that the state has verified that the individual is authorized to work in the US, and has run a criminal background check within the past two years. To verify that a provider number is active, email OHCC.Registry@state.or.us or call 877.867.0077, choose option 1.

Do you have an Oregon HCW Provider number?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>	If yes, Provider No.	654321
--	---	-----------------------------	----------------------	--------

4. The Criminal Background Check: While she/he may seem like a nice person, if she/he are not willing to submit to a background check, there is probably a past offense. If they say it is a single, minor offense you should ask them to submit anyway (to be sure they are telling the truth).

Are you willing to submit to a Criminal Background Check?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>
---	---	-----------------------------

EMPLOYMENT APPLICATION HANDOUT #B3

APPLICANT INFORMATION

Last Name: Smith First: Robert M.I. P. Date: 7/6/11

Street Address: 123 Main Street Apartment: 5

City: Portland State: OR Zip: 97206

Phone: 503-123-1234 Email: rsmith@example.com

Date Available: today Drivers License/ID #: 1234567 State: OR

Times Available: Mon. Tue. Wed. Thu. Fri. Sat. Sun.

Holidays: Not Available

Are you a citizen of the United States? YES NO If no, are you authorized to work in the U.S.? YES NO

Do you have an Oregon HCW Provider number? YES NO If yes, Provider No.: 654321

Do you have a Social Security Card? YES NO If yes, SSN: 123-45-6789

Are you willing to submit to a Criminal Background Check? YES NO

Are you willing to drive your employer's vehicle? YES NO

Are you willing to drive your employer's vehicle in your own vehicle? YES NO

If yes, please complete the below vehicle information:

Insurance Co.: American Family Policy No.: AF1234567890

EDUCATION (please write any additional education on a separate sheet of paper.)

5. Need a Driver? If you need someone to drive you in their vehicle, ensure they have insurance. If they will be driving your vehicle, see chapter 5 on insurance.

Are you willing to drive your employer’s vehicle?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>
Are you willing to drive your employer in your own vehicle?	YES <input checked="" type="checkbox"/>	NO <input type="checkbox"/>
If yes, please complete the below vehicle information:		
Insurance Co.	American Family	Policy No. AF1234567890

6. Are the References Past Supervisors? References from past employers and supervisors are the best references possible. Someone with only friends or former co-workers may not have satisfied former supervisors.

REFERENCE #1 (Please list three professional references.)			
Full Name	Sally Ann Smith	Relationship	Supervisor
Company	ABC Adult Day Living	Phone	503-123-1230

7. Is Their Previous Employment Experience Useful? Do you need someone who has experience in assisting? Look on page 2, under *Previous Employment* for *Responsibilities*.

Job Title	Personal Care Attendant	Starting Wage	\$ 10.00	Ending Wage	\$ 13.50
Responsibilities	Bathing, feeding, and assisting in toileting of residents.				

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EMPLOYMENT APPLICATION **HANDOUT #B3**

APPLICANT INFORMATION

Last Name: _____ First: _____ M.I.: _____ Date: _____

Street Address: _____ Apartment: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Date Available: _____ Drivers License/ID #: _____ State: _____

Days Available: Mon. Tue. Wed. Thu. Fri. Sat. Sun.

Holidays Not Available: _____

Are you a citizen of the United States? YES NO If no, are you authorized to work in the U.S.? YES NO

Do you have an Oregon HCW Provider number? YES NO If yes, Provider No. _____

Do you have a Social Security Card? YES NO If yes, SSN _____

Are you willing to submit to a Criminal Background Check? YES NO

Are you willing to drive your employer’s vehicle? YES NO

Are you willing to drive your employer in your own vehicle? YES NO

If yes, please complete the below vehicle information:

Insurance Co. _____ Policy No. _____

EDUCATION (please write any additional education on a separate sheet of paper.)

School Name	City/State	Dates Attended	Degree	Major

HANDOUT B3: Employment Application

Go to the Forms Packet and pull out the form that reads “**HANDOUT #B3 Employment Application**”. This is the actual form that you will make copies of and give to applicants to fill out.

3.6 — Interviewing Applicants

When hiring an in-home worker many employers conduct a telephone screening prior to sending out an application or holding an in-person interview. Conducting a telephone screen can help you reduce the number of individuals that you need to meet with in-person.

1. The Telephone Screening

This is the initial interview. The purpose of this interview is to determine if the worker meets your basic criteria. There is no point in scheduling a face-to-face meeting if the applicant cannot work the hours you need, prefer not to work for someone with pets, or other important considerations. You may also wish to ask about their experience, personality, and if they have references. We have provided a sample script that you might use while you are calling to stay on track, as well as a form with sample questions you can ask and note the answers on.



EXAMPLE/SAMPLE: Telephone Interview Script

“Hello, my name is _____ (introduce yourself the way you prefer to be addressed). I got your name from _____ (the message they left, the OHCC Registry, etc.). I’m calling because I need to hire someone to assist me (or a loved one) in my/his/her home. I’ll be calling a number of possible hires and asking them the same questions, and will notify you if you are selected to be interviewed in-person. Is that okay with you?”

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HANDOUT #C3

Telephone Screening Form

Name of Applicant: _____ Date of Call: _____

1. What days are you available to work? (Check all applicable days)
 Mondays _____ Tuesdays _____ Wednesdays _____ Thursdays _____ Fridays _____ Saturdays _____ Sundays _____
 Notes: _____

2. Are you able to work from _____ a.m. to _____ p.m.? (check one) Yes No
 Notes: _____

3. If additional hours were needed on other days, would you be able to fill in? (check one) Yes No
 Notes: _____

4. Are there any days/times you are ABSOLUTELY unavailable? (check one) Yes No
 Notes: _____

5. Can you perform the following duties?
 Note: See reverse for types of things you may want to ask them about based on your specific care needs.

a. _____ Yes No
 b. _____ Yes No
 c. _____ Yes No
 d. _____ Yes No
 e. _____ Yes No

6. If you are given training, would you be willing to perform the following duties?
 Note: See reverse for types of things you may want to ask them about based on your specific care needs.

a. _____ Yes No
 b. _____ Yes No
 c. _____ Yes No
 d. _____ Yes No
 e. _____ Yes No

HANDOUT C3: The Telephone Interview

Go to the Forms Packet and pull out the form that reads “**HANDOUT #C3 Sample Telephone Interview Questions**”. This form is designed so that you can fill it out quickly while interviewing the applicant – so that your notes are all on one page. After asking these questions to your interviewee we suggest you thank them for their time and inform them that you will be calling back if you would like to arrange an in-person interview.

2. The In-Person Interview

After you have had the telephone interview and have decided you would like to meet a few of your applicants, schedule your in-person interview for each possible worker. See our tips below, and also pull out the handy form (pictured at right) labeled **D3 - In-Person Interview Questions**

HANDOUT D3: In-Person Interview Questions

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Multnomah and Washington Counties' AHA Community Living Program Grant Initiative
HANDOUT #D3

In-Person Interview Questions
Be sure to use the sample list of questions for each applicant. Ask additional questions during the interview to get additional information about a response they may have given. Open ended questions are suggested, i.e., questions that start with "provide me an example of when...", "tell me about...", "Tell me more regarding..." Requiring more than yes / no answers will help you learn more about the applicant.

Applicant's Name _____ Phone _____

Sample Questions (you may use if you like)	Response
1. Tell me about your previous experience providing in-home care services? What did you like about it? What was difficult for you in providing the services?	
2. Think back to an employment experience that was positive for you. What made it positive?	
3. Tell me more about yourself...	
Your Unique Questions...	

Your impression of this candidate: _____

Would you consider him/her for the position? Yes No Maybe



INTERVIEWER TIPS!

1. If at all possible, conduct interviews in a public place such as a library, community center, or restaurant. Don't provide your address for safety reasons.
2. If possible, have a friend/family member join you during interviews to give you a second opinion, but also for safety.
3. When you call to set up interviews, ask candidates to bring information they will need to complete a written application, including names and phone numbers of references.
4. Try to make the person comfortable, but stay businesslike. You are giving each other first impressions.
5. Introduce yourself the way you wish to be addressed, and if you have someone with you, explain who will be conducting the interview.
6. Give them the application to fill out along with the job description to review.
7. After they have filled-out the form, look it over briefly. Then ask your prepared questions, and record (or have someone else record) the person's answers.
8. You may really like a candidate (and need to hire someone soon) and be tempted to offer the job during the interview, but we strongly encourage you to get their criminal background and references checked first. You can call them and offer the job after you check references.

The In-Person Interview (continued)

Be familiar with the questions that are illegal to ask in Oregon.

Under the Americans with Disabilities Act, you CANNOT:

- Ask if the candidate has a disability
- Ask if they have ever been hurt on the job
- Discriminate against an individual with a disability if he or she can perform the essential functions of the job

Note: For more information, contact Disability Rights Oregon at 800-452-1694 or online at <http://www.DisabilityRightsOregon.org>

You may want to avoid asking questions regarding...

- Age
- Race
- National Origin
- Gender
- Martial Status
- If the applicant has children or plans to have children
- Sexual Orientation
- Religion

Although not illegal for household workers to be asked, it may be seen as discrimination

and someone may attempt to sue you.

Good questions to ask...

- If you need, you can make being able to read, write, and speak a specific language a job requirement
- Volunteer information about yourself (such as your religion) and ask if the candidate has issues with it
- Ask follow-up questions about any information the individual volunteers about him or herself
- If the individual is over 18 (for work restriction purposes)
- If they are eligible to work in this country



WATCH OUT!

For safety reasons do not provide this first telephone interviewed individuals with your home address. You can provide them with general geographical information such as what neighborhood you live in.

3.7 — Background and Reference Checks

When you are hiring someone other than an immediate family member completing a criminal background check and contacting references is a very important part of the hiring procedures. Information gained from reference checks can help you weigh which applicant may be a best fit for your needs and personality. Additionally, criminal background checks help screen out undesirable applicants.

HANDOUT E3: Suggested Reference Questions

Go to the Forms Packet and pull out the form that reads “HANDOUT #E3 Suggested Reference Questions”. When calling to speak with the references, feel free to use this form, change the questions, add more questions, or not ask some questions.

It is smart to keep these notes filed with each application, and keep them both for future reference.

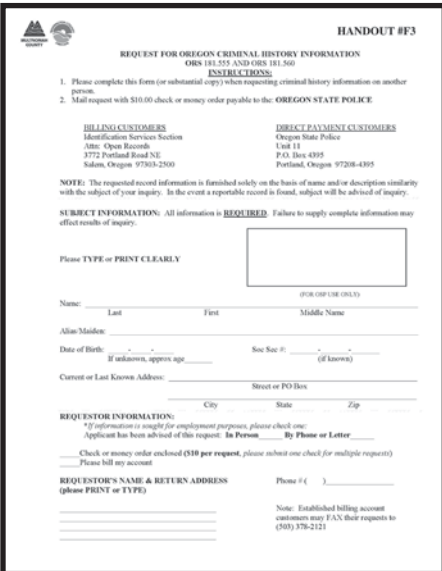


TIPS!

1. When trying to reach the reference, call and ask when there is a good time to talk. They may need some time to gather their thoughts or they may be very busy and not have time to give you enough valuable information.
2. A good question to ask is, “Would you hire this person back?” If the reference isn’t sure or has a hard time answering this easily, this could be seen as a negative.
3. Talk with more than one reference to be sure you are getting the most accurate information about an applicant. Just one supervisor may not have had the same experiences as another supervisor.

3.7 — The Criminal Background Check

Next you should perform criminal background check(s) on whomever you feel you may want to hire. Since it costs \$10 for each Oregon criminal history check, you may want to save this process for the applicant you are most likely to hire.



HANDOUT #F3
REQUEST FOR OREGON CRIMINAL HISTORY INFORMATION
ORS 181.555 AND ORS 181.560
INSTRUCTIONS:
1. Please complete this form (or substantial copy) when requesting criminal history information on another person.
2. Mail request with \$10.00 check or money order payable to the: OREGON STATE POLICE

BILLING CUSTOMERS
Identification Services Section
Attn: Open Records
1772 Portland Road SE
Salem, Oregon 97303-2500

DIRECT PAYMENT CUSTOMERS
Oregon State Police
Unit 11
P.O. Box 4305
Portland, Oregon 97208-4305

NOTE: The requested record information is furnished solely on the basis of name and/or description similarity with the subject of your inquiry. In the event a reportable record is found, subject will be advised of inquiry.

SUBJECT INFORMATION: All information is **REQUIRED**. Failure to supply complete information may affect results of inquiry.

Please TYPE or PRINT CLEARLY

Name: Last First Middle Name
Alias/Initials: _____
Date of Birth: _____ Sex: _____ (if known) _____
Current or Last Known Address: _____
City State Zip

REQUESTOR INFORMATION:
If information is sought for employment purposes, please check one:
Applicant has been advised of this request. In Person By Phone or Letter _____
 Check or money order enclosed (\$10 per request, please submit one check for multiple requests)
 Please bill my account

REQUESTOR'S NAME & RETURN ADDRESS (please PRINT or TYPE) _____ Phone # () _____
Note: Established billing account customers may FAX their requests to (503) 378-2121

HANDOUT F3: Criminal History Information Request

Go to the Forms Packet and pull out the form that reads “HANDOUT #F3 Criminal History Information Request”. This is a copy of the official Oregon form that you may fill-out and submit to the Oregon State Police (OSP).

Note: There is a chance that Oregon State Police has updated this form since our publication. Please contact OSP at 503-378-3070 for a recent copy, or go to <http://Oregon.gov/OSP> for online submission and payment. (Note: You must have an email to submit online payment.)



IMPORTANT NOTE!

When the applicant filled out his or her application, they should have checked “Yes” in regard to consenting to a criminal background check. If they failed to answer this question, have them consent at the interview. While verbal consent is allowed, we suggest you have them check the box in case there is a dispute later.

Are you willing to submit to a Criminal Background Check?

YES

NO



TIP! If the applicant is from out of state or only in Oregon for a few months, you should run a criminal background check for the state of prior residence.

3.8 — Accepting or Declining Applicants

Accepting an Applicant

You've chosen a candidate! Now you need to notify them and ensure that the arrangements spoke about in the interview are still agreeable. Go to the last page of this chapter and pull out the script and form (pictured at right) labeled **G3 - Hiring Offer Phone Call Script**

Calling to Offer the Position

When calling to offer the position, it is important to repeat what you and the applicant discussed in the interview. This ensures that the applicant understood the obligations of the job, the pay rate and the terms of employment. You will have a formal form for them to sign on the first day, but just asking will save everyone time. You should...

- Tell the applicant that you are prepared to offer them the position, but would like to first review the work schedule, pay rate, pay dates, tax information, and a few details over the phone to be sure you are both in understanding.
- Repeat the expected work schedule that you spoke about in the interview. Get a verbal approval of that from the worker that they are still willing to work those dates and times.
- Repeat which holidays or days they have off. Again, get a verbal approval.
- Repeat the hourly pay rate you are offering, as well as the day they will get paid (e.g., paid weekly, twice a month, or monthly.)
- State if you didn't in the in-person interview that they will need to complete an IRS Form W-4.
- Review your policy on sick day notice, planned absence notices, emergencies, and lateness policies. (Example: Call ahead if you're going to be five minutes late or more, and absences will need to be planned at least one week in advance so I can find someone to cover you.)
- If the person will be driving you in their car, discuss if they have insurance that will cover the chauffeuring and how gas will be paid for.
- Finally, repeat policies on smoking, drug or alcohol use on the job, theft, unauthorized use of your property, quitting by them and dismissal by you. (See the supplied script for suggested policies.)

HANDOUT G3: Hiring Offer Phone Call Script

CLP Options Counseling
Multnomah and Washington Counties | At-Home Living Program Grant Initiative
HANDOUT #G3

Hiring Offer Phone Call Script

Hello, may I speak with [The Applicant]? Hello again, this is [the client].

I am calling to tentatively offer you the position of In-Home Care Worker. I just need to review what we spoke about in our interview and be sure we both understand the terms of employment, work hours, compensation and general responsibilities.

The work schedule will be from _____ to _____ from _____ a.m. to _____ p.m. As needed, you will accompany me on an outing (theater, movie, concert, appointments, etc.) approximately one evening per week, to be negotiated on an individual basis. I will pay all expenses for such outings, as well as for your time. Do you agree to this?

Compensation will be at that rate of \$ _____ per hour, paid _____ (weekly, bi-monthly, monthly, etc.). You need to complete and give me the IRS Form W-4 with your withholding information. I will withhold federal and state income taxes, FICA (Social Security) taxes _____ (weekly, bi-monthly, monthly, etc.). I will give you a W-2 form for your use in filing your income tax statement annually. Do you agree to this?

In addition, you will have access to the _____ (breakrooms, kitchen, etc.). Although I have a vehicle that can be utilized for you to take me to appointments or outings, it is not reliable, therefore, having a reliable vehicle on your end will be helpful. Gas mileage will be negotiated. Do you agree to this?

Except for emergencies, both you and I must give at least two (2) days advance notice in the event of a planned absence. In an emergency, notification must be given as soon as possible. If you are running or expecting to be a minimum of five (5) minutes late, please contact me immediately. Do you agree to this?

Theft of unauthorized use of my property, any use of controlled substances, use or being under the influence of alcohol during working hours, or endangerment of my health or safety will result in automatic termination. We each agree to give two (2) weeks notice of termination for other causes. Do you agree to this?

My living space/home is a no-smoking environment. I do not smoke or permit smoking by anyone else in my home or any portion of the premises. We may discuss an appropriate place for you to take a smoking break off premises.

We will cooperate so that tasks required can be completed in a reasonable amount of time. We will respect each other's dignity and privacy. I look forward to a mutually rewarding relationship.

© Adapted from: Working Personal Assistant: A Complete Guide, Published by: Novena, 2008.

3.8 — Accepting or Declining Applicants

Declining Applicants

It is time to let the other applicants know that they were not chosen. You would generally send a letter of decline instead of calling. There are two types of letters that you should send.

Declining an Applicant

For whatever reason, this person may not have been qualified or there was a schedule or personality mismatch. Here's a sample letter that you could use.

Thank you for your interest in the In-Home Worker position. I am pleased that you have contacted me regarding possible employment and allowed me the opportunity to review your experiences and qualifications.

Unfortunately, at this time your skills and schedule of availability do not match my needs and I am unable to offer you employment.

Thank you for your interest.

Sincerely,

[Your Name]

Declining an Applicant with Potential

Did you have an applicant that you would you consider for a job in the future or if you need to replace a worker? Here's a suggested letter to decline them while letting them know you may call someday to see if they may be interested in a position. You should keep these resumes, job applications, and references on file.

Thank you for your interest in the In-Home Worker position. I am pleased that you contacted me regarding possible employment and allowed me the opportunity to review your experiences and qualifications.

Unfortunately, at this time your skills and schedule of availability do not match my current needs and I am unable to offer you employment.

However, I would like to keep your name and number on file for future reference, in case your schedule or my needs change.

Thank you again for your interest and the time invested in applying and interviewing for this position.

Sincerely,

[Your Name]

Steps To Using An Agency

In This Chapter...

- 4.1 – The Role of an Agency
- 4.2 – Steps to Using an Agency
- 4.3 – Finding Agencies
- 4.4 – Interviewing Agencies
- 4.5 – Screening Agencies



4.1 — The Role of an Agency

What is the agency generally responsible for? What are you responsible for? Employment agencies that specialize in home workers have certain things they do for you, the client, and charge for those services. Some agencies are different than others.

Most Agencies are Responsible for...

- Hiring of workers
- Supervising Workers
- Firing of workers
- Payroll and taxes
- Screening workers

Forms & Handouts In This Chapter:

- A4 – Interviewing Agencies

Hiring Through an Agency

Advantages

- All of the hiring/firing is done by the agency
- Some agencies have staff with a variety of skills and certifications
- Workers are screened and supervised, and may be bonded
- The agency typically provides back-up for workers
- Some agencies pay insurance coverage
- The agency serves as employer and handles payroll and taxes

Disadvantages

- This option is usually more expensive than self-hiring a worker
- You have less choice in selection of worker(s)
- Service plans are typically based on agency assessment of your needs, instead of your own support plan
- There may be restrictions on services workers may provide, such as pet care or lawn services
- Many agencies have a minimum number of hours per shift
- Workers may be switched out without notice.

4.2 — Steps to Using an Agency

While using an agency can be easier (but more costly), there are still steps you would need to take to use one. See below for an overview. You can come back to this list and check it off as you complete each task.

- STEP 1:** Find and select an agency or agencies to interview.

Notes: _____

- STEP 2:** Interview the agencies to be sure you find one that takes care of what you want taken care of by the agency and what you want the freedom to do yourself (i.e., agencies vary in policies for selection of employees, who is the insurer, who takes care of taxes, payroll, hiring/firing, and back-up/emergency staffing).

Notes: _____

- STEP 3:** As mentioned in step two, some agencies do not handle insurance, payroll and/or filing taxes. You may have to take care of these steps.

Notes: _____



IMPORTANT NOTES!

What does being a LICENSED agency mean?: Being licensed means that the agency has been trained in the proper practices and regulations concerning hiring and administrating workers. It also means that the agency understands the laws and can be held accountable if the laws are broken.

What does being BONDED mean?: Bonded means that a bonding company has set aside money that is controlled by the state (not the agency) to pay in the event that a client files a claim against the agency. It ensures that if you have a theft or loss that you want the agency to pay for that the agency can pay it.

4.3 — Finding Agencies

If your choice is to hire through an employment agency, there are several ways one can locate an employment agency to work with. You will want to get information for several agencies and interview each of them.

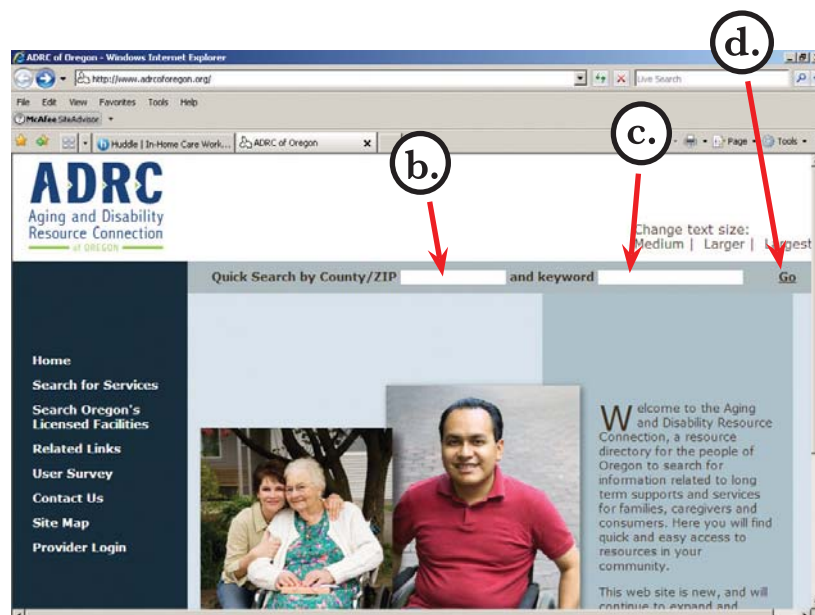
Here Is A List Of Ways To Find Agencies:

1. Multnomah County Aging & Disability Services (ADS) Helpline

If you're not familiar with the internet, you can call the Multnomah County Aging & Disability Services Helpline at 503-988-3646 (or TTY at 503-988-3683). The Helpline staff can look up agencies in your area that suit your needs and recommend good agencies.

2. The Aging And Disability Resource Connection (ADRC) Website -

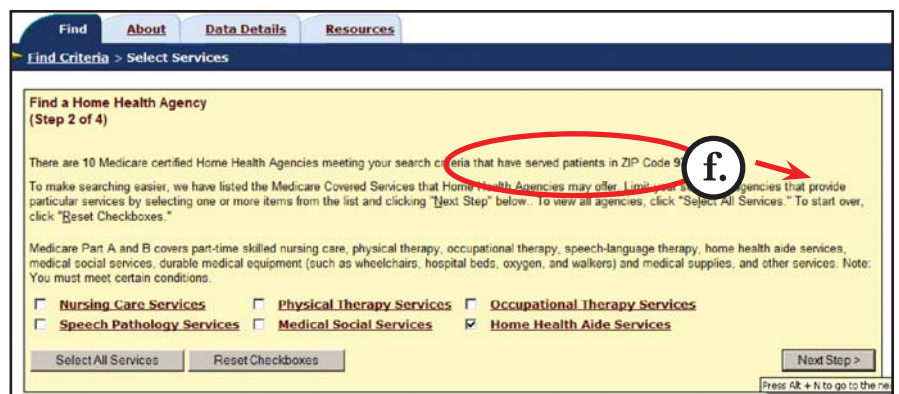
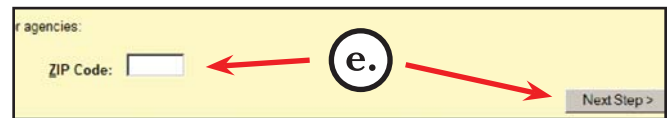
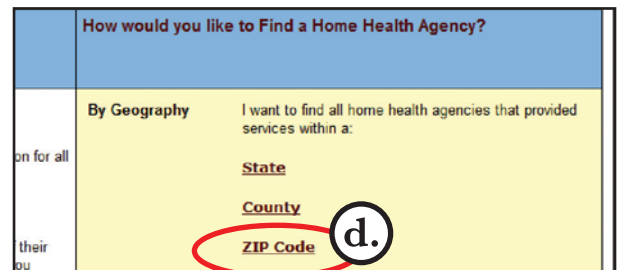
- a. Go to <http://www.ADRCoforegon.org>
- b. At the top of the page, but in your zip code into the **Quick Search**
- c. Type in the keywords “**Personal Care**”
- d. Click the **GO** link.



3. The Medicare Website

You can use the Medicare.gov website to search for agencies. Here's how...

- a. Go to <http://www.medicare.gov>
- b. Click on “**Resource Locator**” button in the top navigation. It will take you to a new page.
- c. In the left navigation, click on “**Home Health Agencies**” button. (Note: You can do this from the home page too, but this might be easier.)
- d. Scroll down to see a yellow search box. Click the red link to choose to search by **zip code**.
- e. Below the box another yellow search box will appear that you can put your **zip code** into. Then press the **Next Step** button.
- f. The next page will be another question for you. They will want to know what type of Home Health Agency you need. Check the box that reads “**Home Health Aide Services**” and then click the “**Next Step**” button at the right.



You're done! The next page will be a list of agencies in your area!

Optional: *If you wish to review statistics on the agencies, check the boxes next to the agencies and click the “Next Step” button at the bottom.*

4.4 — Interviewing Agencies

Once you have a list of agencies, start by calling them and interviewing them on the phone. You're going to want to ask them about...

1. Agency Business, History, and Information
2. Services They Provide
3. Qualifications of Their Workers
4. Fees and Billing
5. What They are Responsible For
6. What You are Responsible For



CLP Options Counseling	
HANDOUT #A4	
Interviewing Agencies	
Once you have a list of agencies, start by calling them and interviewing them on the phone. Here are some questions you may wish to ask:	
SERVICES PROVIDED	
What services do you provide?	
Are services available 24 hours, 7 days a week?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Could services begin immediately? If not, how long would I wait?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Does the agency do an assessment of my service needs?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Do you develop a specific job description?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Will your agency honor my own support plan and job description?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Are there any services or tasks your staff are not permitted to perform?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
If applicable: Is there a minimum number of hours per shift?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
COSTS AND FEES	
What are your rates for the services I need?	
Are there deposits, fees or any extra costs besides the hourly rate?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Are there sliding scale rates based on my income?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
When was your last rate increase? By how much?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
If applicable: Do you accept Long Term Care insurance?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Do you bill insurance directly?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Are all cost and payment expectations in writing?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:
Will you send me a copy of your contract to review before I decide?	<input type="checkbox"/> Yes <input type="checkbox"/> No Explain:

HANDOUT A4: Interviewing Agencies

Go to the Forms Packet and pull out the form that reads “**HANDOUT #A4 Interviewing Agencies**”. This is a form with a list of questions that you can ask during the telephone interview of the agency that makes it easy and fast to make the call.

If you go to visit the agency in person to interview them, bring a friend or family member.



WATCH OUT!

Do not sign any contracts with any agencies until you have spoken to at least three agencies to explore your options. If one agency does not do what you need, try another. There are many!

4.5 — Screening Agencies

Either before or after interviewing agencies, you may want to check with some services that receive and publically share feedback about agencies. For some people, this step can be helpful while for others it can be confusing to look through both positive and negative feedback from previous clients. Keep in mind that a few bad ratings may not reflect the quality of the agency, but many complaints may suggest issues.

The Better Business Bureau — <http://www.bbb.org>

Use the “Check Out a Business or Charity” search to check and see if anyone has filed a complaint or complaints with the BBB. It’s not important if the agency is a BBB member or not. You are checking for complaints only.

Angie’s List — <http://www.AngiesList.com>

This rating service is a paid service – it is \$3.20 a month for a basic membership – but is useful in that Angie’s List verifies each feedback to be sure they are not false.

Yelp — <http://www.yelp.com>

This is a free service of registered users who put in reviews. The postings are not verified as true or false, but there will often be information about the business such as specialities and history. The reviews can be useful but read them carefully as they are only opinions.



TIP!

You may want to ask a knowledgeable friend or family member to also review the agency contract before you sign it.

Insurance, Taxes & Other Considerations

.....
In This Chapter...

- 5.1 – Employer & Home Insurance Policies
 - 5.2 – Checking Your Auto Insurance Policy
 - 5.3 – Using a Payroll Service versus Handling Payroll Yourself
 - 5.4 – Filing Taxes on Wages
-



5.1 — Employer & Home Insurance Policies

Many homeowners who hire workers are not aware of the need for insurance to cover them in case an accident occurs on their property. After an accident, you may be financially liable. Find out what your insurance covers before hiring.

Workers Compensation Insurance

According to the Department of Consumer and Business Services, “Private residence workers” do not have to be covered under workman’s compensation. This is any people working for you at your home and includes cleaning, home health care, gardening, maintenance, and even remodeling.

For more information, contact the State of Oregon Department of Consumer and Business Services - Workman’s Compensation Division at

Phone: (503) 947-7815

Toll Free: (888) 877-5670

E-mail: wcd.employerinfo@state.or.us

.....
**Forms & Handouts
In This Chapter:**

- **There are no forms for this chapter.**
-

Homeowners Insurance

You should speak with your insurance agent about paid and unpaid in-home workers and care givers in your home, and review what coverages you have for liability and medical to assess if your current coverage is sufficient. You will also need to decide if you want to add an individual worker's compensation policy to your coverage. Some homeowner's policies specifically exclude domestic workers such as care workers, while others cover injuries of household employees only under the liability coverage section.

In addition to the liability coverage provided under your homeowners policy, you may want to consider additional liability coverage to protect your assets in the event of a liability judgment that exceeds the limits of your homeowners insurance. Talk to your insurance agent about what your policy covers and does not cover, and if extra liability insurance is needed.



Adapted from

1. *Insurance Source.com* - <http://www.shopinsuranceonline.com/oregon.htm>

2. *The Michigan WCA - Workers' Compensation Agency* <http://www.michigan.gov/wca>

3. *Insurance.com* - <http://www.insurance.com/home-and-renters-insurance/coverage/legal-liability-for-landscaping-help.aspx>

5.2 — Checking Your Auto Insurance Policy

In-home workers often use their own cars to take their clients to appointments, but you may choose to want them to drive your car instead. Whatever you decide, check your insurance policy to see what it will and won't cover. Insurance coverage varies from company to company, so contact your agent or insurance company if you have questions.

Your worker may need his or her own separate business coverage in order to transport you. The employment application (Chapter 3) provides an area for applicants to list their insurance policy and coverage.

5.3 — Using a Payroll Service versus Handling Payroll Yourself

Handling Payroll Yourself

If this is your first experience handling payroll, the payroll tax reporting and deposit procedures will eventually become second nature to you, but it is definitely confusing when you first start out. Follow these tips...



PAYROLL TIPS!

1. Find someone who understands the payroll tax calculation and reporting process. Have them show you their completed forms and walk you through the process. Call friends or family that have a business to ask them about tax payments. Also see section 5.4 about state resources.
2. If you can, we recommend using a payroll software such as Quick Books or Intuit Online Payroll. These include handy tools to ease the payroll process. To find out more go to: <http://payroll.intuit.com>
3. Report your payroll taxes. Yes, that means all of them on all of the nice little forms, and when the reports are due. This means reporting them on time, every time!
4. Make sure that your deposits are accurate and on time. IRS penalties and fines are expensive.
5. Always consider the additional payroll tax expenses when calculating an employee raise. You may want to consider offering your employee additional benefits (like paid vacation days) instead of a raise because a raise means additional payroll taxes.
6. Don't wait to pay your payroll taxes. If you are delinquent in making deposits for any length of time, it can have legal repercussions. Also, if you stop employing workers you will still owe these taxes, so pay these taxes before you use the money elsewhere.
7. Have a separate checking account for paying worker wages and related taxes.

What Do Payroll Services Do?

Here's a list of basic services most payroll services do:

- Calculate payroll
- Calculate tax obligations
- Print and deliver checks
- Provide management reports

How Do I Find A Payroll Service?

There are numerous payroll services available for use in Multnomah and Washington Counties. The fees are set by the individual payroll service providers. Contact the Multnomah County ADS Helpline for a list at (503) 988-3646.

Adapted from

1. *Everyday Business.com, Five Basic Rules For Handling Payroll - <http://www.everyday-wisdom.com/handling-payroll.html>*
2. *Yahoo! Small Business, What do payroll companies typically offer?, By Sandra Boncek - http://smallbusiness.yahoo.com/r-article-a-2140-m-2-sc-52-what_do_payroll_companies_typically_offer-i*



IMPORTANT NOTE!

For information on paying federal taxes for household employees, call 1-800-TAX-FORM and ask for “Publication 926”.

ALL of the below forms can be ordered by calling 1-800-TAX-FORM. Most are available from the IRS Web site at: www.irs.gov/formspubs/index.html

5.4 — Filing Taxes on Wages

As the employer, you may be responsible for withholding Social Security taxes, Medicare taxes and/or federal unemployment tax and filing them with the Internal Revenue Service annually or quarterly. Social Security taxes are owed by both the employer and the employee. Rules governing the amount(s) to be withheld and payment schedules can change annually.

Note: This information is not intended as accounting advice. Discuss your plan with your financial and legal adviser.

Do You Have a Household Employee?

You have a household employee if you hired someone to do household work and that worker is your employee. The worker is your employee if you can control not only what work is done, but how it is done. If the worker is your employee, it does not matter whether the work is full time or part time or that you hired the worker through an agency or from a list provided by an agency or association. It also does not matter whether you pay the worker on an hourly, daily, or weekly basis, or by the job. Household work is work done in or around your home. Some examples of household work are caretakers, house cleaning workers, domestic workers, drivers, health aides, housekeepers, private nurses and yard workers. Please review IRS information related to cash wages paid to your spouse, your child under the age of 21 or your parent.

Household Employer's Checklist (from IRS Publication 926)

You may need to do the following things when you have a household employee.

- When you hire a household employee:**
- Find out if the person can legally work in the United States.
 - Find out if you need to pay state taxes.

- When you pay your household employee:**
- Withhold social security and Medicare taxes.
 - Withhold federal income tax.
 - Decide how you will make tax payments.
 - Keep records.

- By January 31:**
- Get an employer identification number (EIN).
 - Give your employee Copies B, C, and 2 of Form W-2, Wage and Tax Statement.

- By February 28*:**
- Send Copy A of Form W-2 to the Social Security Administration (SSA).

*(April 1, if you file Form W-2 electronically)

- By April 15:**
- File Schedule H (Form 1040), Household Employment Taxes, with your federal income tax return (Form 1040, 1040NR, 1040-SS, or Form 1041). If you do not have to file a return, file Schedule H by itself.

Note: Employers of household employees do not usually file Form 941. See the current IRS Publication 926 Household Employer's Tax Guide for additional information and dates: <http://www.irs.gov/pub/irs-pdf/p926.pdf>

More About Filing Taxes on Wages Paid to In-Home Workers

There are also state and local tax forms to complete for state forms and information contact:

Oregon Department of Revenue

questions.dor@state.or.us

Phone: 503-378-4988

Toll Free: 800-356-4222

Fax: 503-945-8738

TTY: 800-886-7204

<http://www.oregon.gov/DOR/>

Another excellent resource for understanding wage-an-hour laws and requirements is the Oregon Bureau of Labor of Industries (BOLI) www.oregon.gov/BOLI

We also suggest that you contact an accountant if you have any additional questions on taxes that you need to pay.

Your Notes:

Supervising Your In-Home Worker

In This Chapter...

- 6.1 – Having Your Worker Fill-out an Employment Agreement
- 6.2 – Training an In-Home Worker
- 6.3 – Time Sheets & Paying Your Worker
- 6.4 – Employee Reviews
- 6.5 – Termination & Replacing a Worker



6.1 — Having Your Worker Fill-out an Employment Agreement

Either before or on the first day, it is best to have your new worker fill out an Employment Agreement. It is an agreement that states what you expect - in writing - to the worker that they sign to verify they accept the terms. It is a great way to ensure the worker understands what is expected of them. You can refer back to this form if there is ever confusion over roles.

Forms & Handouts In This Chapter:

- A6 – Employment Agreement
- B6 – Activities & Tasks Worksheet
- C6 – Special Dietary Needs
- D6 – Timesheet
- E6 – Employee Performance Review

HANDOUT A6: Employment Agreement

Go to the Forms Packet and pull out the form that reads “HANDOUT #A6 Employment Agreement”. This form is what you will have them fill out on the first day of work. See the following pages for tips.

Information You Should Include in Your Employment Agreement Duties

The first section of the agreement is titled “duties” and covers the duties that the employee agrees to perform as instructed. Fill this out before you meet with your worker and be sure of all of the duties you need them to perform that you listed in handout B2 “Hiring and Budgeting” and handout A3 “Job Description” are included.

Suggested items that may apply to you are...

- Light housekeeping such as laundry, dusting, making bed and disinfecting counter tops
- Prepare meals for employer when needed
- Assist with transfer to and from bed, wheelchair (or walker), toilet and bath.
- Stand-by for safety during shower
- Assist with towel drying and applying lotion to legs
- Push wheelchair as needed in back yard so employer can get fresh air
- Accompany employer to take dog for a walk and assist with animal waste disposal as needed
- Occasionally provide transportation for medical appointments and grocery store visits. (This may involved folding wheelchair or walker and placing in car.)



Hours

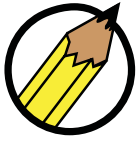
In the section on working hours, be sure to check the boxes (if any) of holiday coverage you may need. If they work every other week, be sure to make a note of that as well.

Salary

When listing the salary, remember that the pay rate you list here will be before taxes. Also, if you are using a payroll service, write in the name of the payroll company.

Breaks

State when the regular time for breaks occur and how long those breaks are to be – it is Oregon state law to provide a 10 to 15 minute break for every four hours worked and a 30 minute lunch break.

**TIP!**

Remember to make arrangements for access into your building such as keys, access codes, or someone to let the worker in. Notify your building manager so they will be aware.

Performance Reviews

You will want to conduct regular performance reviews and be clear with the employee that continued employment is based on acceptable performance. The first review should be done within three months of hire. Also, give verbal feedback each week during the first 4 to 6 weeks of employment. You may also want to give a raise after six months or a year if the employee has satisfactory performance.

Rules and Expectations

Be clear about your expectations, house rules, and grounds for termination. If you do not allow anyone to handle the family heirlooms such as china, glassware or pictures – state that these are off limits and not to be used nor handled. Also be clear about what is expected, for example, when you say you have lunch at noon is that right at 12:00 noon or is there flexibility? List these rules and expectations in the Employment Agreement (Handout #A6).

Employer Privacy

You have a right to have areas of your home, belongings and personal information private. Secure your personal information such as social security number and insurance policies in a private area or in a locked storage box.

Cell Phone Policy

If you do not want your in-home worker answering their cell phone except on regular breaks, state it clearly in writing in this agreement.

Boundaries

Your in-home worker is an employee and usually not a member of your family. Setting boundaries on what is okay to discuss with you is important. They should not be asking you about your finances, your will or specific details about your relationship with your family. You should never loan money to an employee. Even with family it is important that during the time they are working for you they need to remember that the focus is on your needs and that they are being paid to complete specific tasks the way you want the tasks completed.

6.2 — Training an In-Home Worker

Even the best in-home workers are not mind readers! It is your job to teach workers how to provide each specific service to you. Most employers find it helpful to have instructions written out, as well as providing verbal instructions and showing workers how you want each service provided. Remember that your worker may have a different learning style than you do. Some of us learn best by listening, while others learn by reading, but most of us learn by being shown how to do a task, then doing it and receiving helpful feedback.

Activities & Tasks

There are many ways one can communicate and manage activities and tasks.

- Have the worker initial the Activities and Tasks worksheet each work period (see box at right for this form)
- Write tasks on index cards and use the cards daily to give to the worker as they start their day.
- Use a checklist that is laminated or put into a page protector that can be written on and wiped off with a dry erase marker. (These tools are available at an office supply store.)
- Use wipe boards or dry-erase boards with the tasks listed daily.

HANDOUT B6: Activities & Tasks Worksheet

CLP Options Counseling
Multnomah and Washington Counties (AAA Community Living Program Grant Initiative)

Activities & Tasks Worksheet HANDOUT #B6

On or before your worker's first day, provide this to him or her as a scheduling tool. If you would like to discuss with them the best days or times for their assistance, fill it in with them. One may also want to recreate this on a wipe-board (available at office supply stores) that is displayed in an area of your home where the employee checks tasks off after finishing them.

Activity	Tasks and Preferences	Schedule
<i>Example: Laundry</i>	<i>Ex: Wash in cold water only, no bleach except with whites. Dry on medium heat, fold and put away.</i>	<input type="checkbox"/> Mon. <input type="checkbox"/> Tues. <input checked="" type="checkbox"/> Wed. <input type="checkbox"/> Thurs. <input type="checkbox"/> Fri. <input type="checkbox"/> Sat. <input type="checkbox"/> Sun. <input checked="" type="checkbox"/> Every week or <input type="checkbox"/> Every other week At what time? _____ am / pm (circle one)
		<input type="checkbox"/> Mon. <input type="checkbox"/> Tues. <input type="checkbox"/> Wed. <input type="checkbox"/> Thurs. <input type="checkbox"/> Fri. <input type="checkbox"/> Sat. <input type="checkbox"/> Sun. <input type="checkbox"/> Every week or <input type="checkbox"/> Every other week At what time? _____ am / pm (circle one)
		<input type="checkbox"/> Mon. <input type="checkbox"/> Tues. <input type="checkbox"/> Wed. <input type="checkbox"/> Thurs. <input type="checkbox"/> Fri. <input type="checkbox"/> Sat. <input type="checkbox"/> Sun. <input type="checkbox"/> Every week or <input type="checkbox"/> Every other week At what time? _____ am / pm (circle one)
		<input type="checkbox"/> Mon. <input type="checkbox"/> Tues. <input type="checkbox"/> Wed. <input type="checkbox"/> Thurs. <input type="checkbox"/> Fri. <input type="checkbox"/> Sat. <input type="checkbox"/> Sun. <input type="checkbox"/> Every week or <input type="checkbox"/> Every other week At what time? _____ am / pm (circle one)

Go to the Forms Packet and pull out the form labeled “**HANDOUT #B6 Activities & Tasks Worksheet**”.



LINDA'S IDEA:

Linda wrote each task on an index card with brief instructions on the back. She used the cards to teach her worker how she liked tasks done. Linda had a small corkboard with two envelopes pinned to it that she had labeled “To Do” and “Done”. At the beginning of each week, she would go through the cards, decide on tasks needed to be done that week, and place the cards in the “To Do” envelope. When the worker was done with the task, they would put the card in the “Done” envelope.



Communicating Effectively with Workers

The way that you communicate with employees will directly impact the quality of support you receive and will influence your ability to retain competent workers. This process begins, of course, with how you communicate expectations during the interview process, while discussing the Employment Agreement (See handout A6 for sample) and while teaching and orienting workers to the job. You will be communicating with workers on a daily basis on a variety of matters, including providing instructions and feedback on performance.

It is your job as an employer to set the tone for respectful conversations and to create a positive working environment so that workers will be motivated to do their best. Obviously, treating workers as we would wish to be treated and saying “please” and “thank you” are good practices. It is also good practice to solicit feedback from the employees and work to improve relations.

Communicating Special Dietary Needs

If you eat a special diet such as a diabetic diet, you will need to explain this to your in-home worker if they are involved in preparing meals for you. Additionally, if you use Boost or Ensure, vitamins or other dietary products, you should review the days and times you normally take those. We have provided a dietary needs sample form for your use. This is a form that you can give to your in-home worker which will help in communicating your dietary needs. You may wish to post this form on your refrigerator or near your cookbooks.

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 Multnomah and Washington Counties | AA Community Living Program Grant Initiative

Special Dietary Needs **HANDOUT #C6**

If you eat a special diet such as a diabetic diet, you may need to explain this to your worker if they are involved in preparing meals for you. Additionally, if you use Boost or Ensure, vitamins or other dietary products, you should review with them the days and times you normally take those.

I will need my worker to prepare: Breakfast Lunch Snack(s) # ___ Dinner
 Worker to prepare dinner that can be microwaved by employer later.

DIET TYPE	NOTES ON MEALS & DIETARY NEEDS:
<input type="checkbox"/> No dietary restrictions	
<input type="checkbox"/> Boost or Ensure with or as a snack	
<input type="checkbox"/> Boost or Ensure in addition meals	
<input type="checkbox"/> Diabetic or Heart Healthy	
<input type="checkbox"/> Low Sodium	
<input type="checkbox"/> Low Cholesterol or Low Fat	
<input type="checkbox"/> High Fiber	
<input type="checkbox"/> High Calcium	
<input type="checkbox"/> High Protein	
<input type="checkbox"/> Lactose Free	
<input type="checkbox"/> Low Potassium	
<input type="checkbox"/> High Potassium	
<input type="checkbox"/> Low Phosphorous	
<input type="checkbox"/> High Calorie (over 2,500 calories)	
<input type="checkbox"/> HIV/AIDS or Hepatitis C	
<input type="checkbox"/> Milk Free	
<input type="checkbox"/> Celiac/Gluten Free	
<input type="checkbox"/> Renal Failure/Insufficiency*	
<input type="checkbox"/> Other diet (not listed here)	

*Contains the nutritional elements covered in high calorie, high protein, low sodium, low potassium, low phosphorous, low fat, diabetic and heart healthy.

HANDOUT C6: Special Dietary Needs

Go to the Forms Packet and pull out the form that reads “**HANDOUT #C6: Special Dietary Needs**”. This is a form that you can give to your worker which will help in communicating your dietary needs. You may wish to post this form on your refrigerator or near your cookbooks.

6.3 — Time Sheets & Paying Your Worker

About time sheets

A time sheet is an important way for your worker to keep track of their hours. Evidence of actual hours worked may be required for tax audits or as a record in case of any dispute about wages paid. Have your worker complete a time sheet every week and have them sign the time sheet and then you review and sign it.

Even if their hours will be the same every week, be sure to have them fill it out anyway. Once you both sign it, the form becomes a legal document that says you both agree these are the hours worked. You must pay the worker the number of hours worker and on the scheduled pay days. If you do not you will have violated state law and legal trouble could result.

Paying Your Worker

If you are handling paying your worker yourself it is important to:

- A) Have a time sheet due from the worker on a specific day, and a pay schedule.
- B) Always pay on time.
- C) If you pay in cash, use a receipt book and have the worker sign that they received the money. You can also write a check or provide a money order. Keep a copy on file.
- D) You may want to consider getting a second checking account that is just for paychecks. This may save confusion over what money you have allotted to pay the worker.
Note: It's important to talk to your banker about how to prevent theft from your checking accounts.
- F) Provide the worker with a “tax stub” or note that goes with his or her check that states how much money you withheld from taxes and for what tax.
- G) Keep copies or carbons of paychecks, receipts and tax stubs.
- D) Never let the worker pay for things, such as groceries, for you and then pay them back via their paycheck.

HANDOUT D6: Time Sheet

CLP Options Counseling
Multnomah and Washington Counties LANA Community Living Program Grant Initiative

Time Sheet HANDOUT #D6

Employer: Make copies of this blank time sheet form to be used weekly by employee to keep track of hours.
Employee: Please keep track of your hours on this form.

Employer: _____ Pay period of (dates): _____
Employee: _____

This pay period contained absences.
 This pay period contained time being made up for a previous absence.

Day of Week:	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Start Time:							
End Time:							
Total (Hours/Day):							

Total Hours/Week: _____

By signing below, both parties agree that the hours recorded here are true and correct, and will be the hours that pay to the employee is based upon.

Employer's Signature: _____ Date: _____
Employee's Signature: _____ Date: _____

Go to the Forms Packet and pull out the form labeled “**HANDOUT #D6: Time Sheet**”

Pay Period

Pay period: Weekly, every two weeks, or weekly with a first-week hold are the usual frequency for a non-professional position.

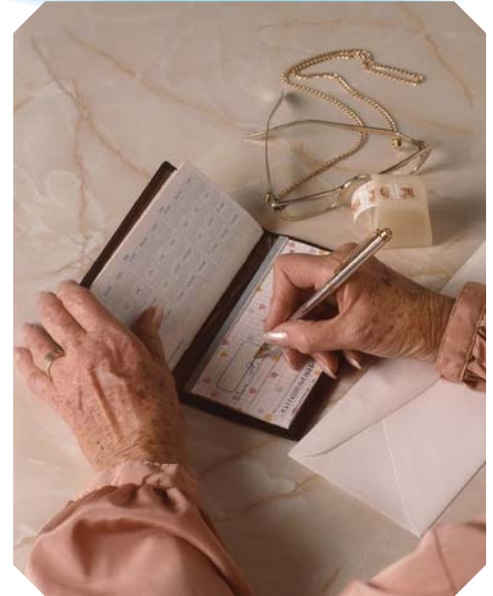
Pay Day

You need time to produce the paycheck and factor taxes owed. To give yourself time, it is normal for someone to be paid the week after they worked (or even later, as in every two weeks) and not on that same week of work.

Weekly: You need to define a pay week. Usually that is Sunday to Saturday but you can choose something else for your seven day week such as Monday through Sunday. Pick a day of the week (generally the last day of the week before a “weekend”). This may seem like the easiest, but you must account for withholding for that week before writing the check, and also provide your worker with a receipt that shows how much withholding you took out and for what tax. Ask yourself if you have enough time.

Every Two Weeks: You pay every other week. Again, this gives you time to do the accounting necessary to ensure the correct amount of tax withholding is taken out and to make the receipt. You can choose the payment to be for the last two week pay period or for the two weeks leading up to the day.

Every two weeks or weekly with first-week hold: You can choose to withhold the first check of the first week worked, and then pay for the week prior’s work on payday. Why? Because if you have some accounting to do for withholding or vacation time, you may want a week to accomplish this before you pay the worker. This is not unusual, but should be explained to the worker in advance so that they know they will not receive a check on their first week of work.



WATCH OUT!

DO NOT let workers take out a “loan” on future paychecks for work they have not yet performed. This is not only risky, as you may have paid for hours that you will not receive but it also complicates your payroll accounting. If they need advance money there are other means such as their family, friends or even payday loan companies.

6.4 — Employee Reviews

An important step with your employee is to provide a review in writing that gives them feedback on how well they are performing their job. See “HANDOUT E6: Employee Performance Review” for a form you can fill out to review your worker. You should both sit down and discuss the results of this review and sign it.

6.5 — Termination & Replacing a Worker

Terminating a Worker

Terminating a worker is never easy, but may be necessary when they are not working out for you.

- A) Have a family member or friend with you when you terminate the worker. This will make it easier to have the difficult conversation with support.
- B) Let them go on the last day of their work week at the end of their shift so that you will have a few days before a new worker starts.
- C) Oregon law states that you do not need to explain why you are terminating an employee, so it is your choice if you would like to discuss any issues.
- D) If the employee has been sent via an agency, you simply contact the agency and they take care of terminating and replacing the worker.

Replacing a Worker

We suggest that if you are replacing a worker in a situation in which the departure of the former worker is amicable (i.e., the worker is leaving for a reason such as pregnancy, career change, etc.) then you may want to ask the worker if they are willing to come in for half-a-day to train the new worker. This may save time and effort for you, however, keep in mind that you will have to pay both workers at the same time.

If the situation is not amicable (i.e., you are terminating due to job performance), it is wise to not start the new worker until after the old worker has departed the premises. (Ensure a scene isn't created.) If you predict there may be trouble, talk to your Options Counselor about ways to handle the situation.

HANDOUT E6: Employee Performance Review

CLP Options Counseling
Multnomah and Washington Counties (ASH) Community Living Program Grant Initiative

Employee Performance Review **HANDOUT #E6**

EMPLOYEE INFORMATION
Name: _____ Date: _____

RATINGS

	1 Poor	2 Fair	3 Satisfactory	4 Good	5 Excellent
Job Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Work Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Attendance/Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Communication/ Listening Skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Dependability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments					
Overall Rating (Average The Rating Numbers Above)					

EVALUATION
Additional comments

VERIFICATION OF REVIEW
By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.

Employee Signature _____ Date _____
Manager Signature _____ Date _____

Go to the Forms Packet and pull out the form labeled “**HANDOUT #E6 Employee Performance Review**”.

Tips for a Healthy Employer & Employee Relationship

.....
In This Chapter...

- 7.1 – Maintaining Boundaries
 - 7.2 – Effective Communication & Resolving Conflicts
 - 7.3 – Watching Out For Fraud, Theft & Other Problems
 - 7.4 – Appropriately Rewarding Your Worker for a Good Job
-



7.1 — Maintaining Boundaries

Setting appropriate limits on the nature of your relationship, what some call “boundaries,” is important as well. Many employers start out wanting to consider workers like friends or members of the family, and come to regret this. If you don’t set boundaries, you may find yourself in the position of spending an inordinate amount of time listening to workers’ problems, and may start making allowances for excessive absences or poor work performance on this basis. It may be difficult to provide constructive feedback to a worker you’ve come to think of as a friend. You may feel betrayed or abandoned when a worker with whom you’ve become too close quits or when the quality of their work declines.

Likewise, especially if you don’t see many other people besides your employee, you may be tempted to share too many details about your life that are unrelated to the employee’s job duties. Workers may interpret this as an invitation to offer unsolicited advice, or otherwise cross the line of what is appropriate decorum toward an employer. Many employers find it helpful to maintain or restore relationships with people besides their worker and health providers. If you were formerly active in a household of faith, social or civic organization before your illness or disability, but are unable to attend regular services or meetings, a phone call explaining the current situation and openness to visitors will often result in renewed contacts. Your health

.....
**Forms & Handouts
In This Chapter:**

- **There are no forms for this chapter.**
-

may permit occasional visits for activities, often including meals, at community or senior centers. Pursuing hobbies and interests, even on a limited basis, can also help you have a life apart from the working relationship with employees.

It's a good idea to discuss with employees, early in your working relationship, any topics that are off-limits. Sex, religion and politics are typically the big three, but you may enjoy an occasional discussion about current events, including politics, or philosophical conversations about spirituality. If so, you should be sure your employee understands that it is not appropriate for either to attempt to sway the other toward their own political position, and that neither will attempt to “convert” the other to their religious beliefs.

7.2 — Effective Communication & Resolving Conflicts

Set aside a regular time to talk with employees about your working relationship. Ask how the worker feels things are going, if he or she is enjoying the job, if you're making expectations clear, and what else you can do to help the worker do his or her job better or improve working conditions.

Deal with any concerns as soon as you're able to do so calmly and in a civil manner. Lashing out in anger when an employee displeases you is not likely to be effective, but neither is holding onto complaints until you have a long list (and accompanying resentments) to deal with.



Mr. Harris' Problem:

Mr. Harris was having trouble with his employee moving his walker when they were cleaning, and it would make him really angry. He got in the habit of yelling, “Who the #(@& moved my walker?” and saying “you idiot” when the worker would bring it back. He couldn't understand why they didn't get it. After he learned how to express this concern using the assertive communication model, he was amazed at how his employee stopped to think and put the walker back. It was initially hard for Mr. Harris to verbalize his feelings of vulnerability, but he realized it helped employees to understand how actions they thought of as “no big deal” affected him greatly.

Consider Mr. Harris' problem...

Note that there are three parts to the way that Mr. Harris learned to express his concern about having his walker moved.

1. Objectively describe the behavior.	<i>"When you move my walker..."</i>
2. State how it affects you.	<i>"...I feel stranded where I am."</i>
3. Express what you want in the future.	<i>"I need for you to put it back where I can reach it."</i>

7.3 — Watching Out For Fraud, Theft & Other Problems

In-home workers can become trusted friends. Unfortunately, some older adults can be victimized by in-home workers attempting to defraud them. Frauds and thefts against the elderly by people they know and trust are surprisingly common. Examples cited by the Justice Department and other sources include stealing money; cashing checks without permission; transferring the ownership of property such as homes; committing identity theft; "borrowing" funds without intending to repay; and denying services to the elderly person, even medical care.

You and your loved ones should be concerned if:

- An in-home worker becomes extremely interested in your financial affairs – or the worker is offering or insisting to take care of finances for you.
- There are unauthorized withdrawals from checking or savings accounts.
- The in-home worker claims that they have been told by your case worker to perform financial actions on your behalf.
- An in-home worker prevents you from talking on the phone or doesn't pass along phone messages.
- A worker who is isolating you from seeing your friends and family.
- A worker who wants to spend an unusual amount of time with you outside of their scheduled work day.
- A worker that makes romantic or sexual advances toward you.
- You notice that you are missing a lot of pills such as pain medications.

If you do not feel comfortable or safe confronting the worker yourself, please contact your Options Counselor to discuss intervening on your behalf. It is possible that the worker was not committing fraud or theft, but better safe than sorry. Remember to never give your bank account, Social Security, or credit card number(s) to an in-home worker. Contact your Options Counselor if your worker requests these to discuss the possibility of fraud.

7.4 — Appropriately Rewarding Your Worker for a Good Job

A worker is a great asset to you and your ability to live independently. Perhaps he or she even goes above and beyond in their tasks. While you are never expected to reward your worker other than paying them their wages, you may want to express your gratitude. Remember that there are appropriate and inappropriate ways to reward a worker.

Appropriate ways to Reward:

- Write him or her a thank you note.
- Write them a letter of reference saying how good they were to work with. They can use this with a future employer and it may help them get a job.
- Tell your Options Counselor how well he or she is working for you. Your counselor may have more people that could use his or her services and can refer that worker with confidence that they will do a good job.
- Simply remember to tell them “thank you”. This can be easily overlooked when someone is your employee. Your acknowledgement of their efforts will be appreciated.

Inappropriate ways of rewarding: (Do not do these!):

- Don't purchase gifts for the worker. This may make them uncomfortable and most workers are instructed to decline these gifts due to concerns.
- Don't give money beyond wages to the worker. Like gifts, money is not an appropriate way to reward.
- Don't offer to make dinner or offer drinks to the worker.
- Don't offer to do things for the worker, such as driving them or storing things for them at your home.

If your worker is requesting any of these things as an additional payment or reward, please contact your Options Counselor. Remember to never give your bank account, social security, or credit card number(s) to an in-home worker.

Chapter 8

Planning For Emergencies

In This Chapter...

- 8.1 – Discussing Emergency Plans
- 8.2 – Weather & Natural Disasters
- 8.3 – Pet Maintenance & Emergencies
- 8.4 – Advance Directives



8.1 — Discussing Emergency Plans

We believe that it is important to hope for the best and plan for the worst. Your worker(s) will probably feel more comfortable knowing in advance what is expected in an emergency.

Talk to your worker about:

- What sort of medical emergencies they might expect, and what they should do. If you have a history of seizures, is there a safe procedure in which workers can be trained? or should they call 911?
- If any of your medications have side effects that could be life-threatening.
- Who they should call after 911 if you are in a medical emergency.

Forms & Handouts In This Chapter:

- A8 – Emergency Health Information & Instructions



IMPORTANT NOTE!

Emergency responders are trained to first look on your refrigerator, but you may also wish to post information for workers near telephones.

8.2 — Weather & Natural Disasters

Tips for Success:

- Discuss back-up plans for workers if inclement weather makes it difficult to come to work.
- Discuss escape routes out of your home in case of fire or natural gas leak.

(Continued on next page)

Natural Disasters, continued...

- Keep a duffle bag or backpack (which are now available with wheels) that has enough medicines, personal care products and basic food in it for at least 72-hours. This is for cases of evacuation. Tell your health worker where you store this bag.
- Keep at least 72-hours of emergency bottled water in case the water is contaminated.
- In case of earthquake, if you cannot exit the home, get to the nearest sturdy doorway. This part of your home is likely to be the most reinforced.

8.3 — Pet Maintenance & Emergencies

Your pets are an important part of your independent life. If you don't already, you should have an emergency plan in case you cannot care for your animals yourself.

Pet Maintenance

Develop and discuss plan with your neighbors, friends, relatives and in-home worker for how to care for your pet in case of an emergency that requires you to be away from home (ex: hospital stay).

Pet Emergencies

Have a plan for transport to veterinary treatment for your pets for when you are absent or physically unable to transport them yourself.

8.4 — Advance Directives & POLST Form

What kind of medical care would you want if you were too ill or hurt to express your wishes? Advance directives are legal documents that allow you to convey your decisions about end-of-life care ahead of time. They provide a way for you to communicate your wishes to family, friends and health care professionals, and to avoid confusion. Talk to your doctor about advance directives and the POLST form (Physician's Orders for Life-Sustaining Treatment form). To view a sample of the Oregon form, go to <http://www.OHSU.edu/polst/>

HANDOUT A8: Emergency Health Information & Instructions

EMERGENCY HEALTH INFORMATION & INSTRUCTIONS HANDOUT #A8
Note: We suggest you post this to your refrigerator or on the back of the front door.

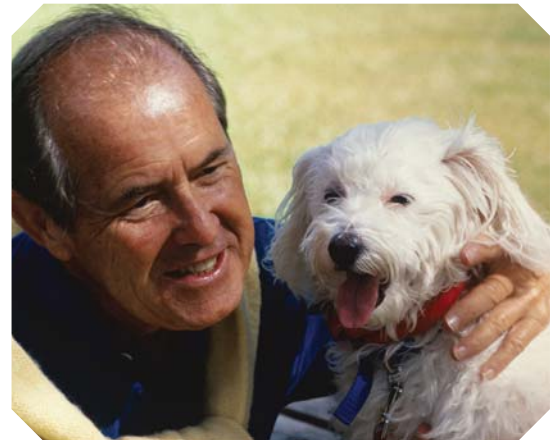
NAME: _____ DATE: _____
 CONTACTS, PHONE #'S & RELATIONSHIP: ALLERGIES TO MEDICINES: _____
 1. _____ DATE OF BIRTH: _____
 2. _____ MEDICAL HISTORY: _____
 PHYSICIAN & PHONE: _____
 HEALTH CARE PLANS: _____ ADVANCED DIRECTIVES: _____
 (OVER)

test level →

EMERGENCY HEALTH INFORMATION & INSTRUCTIONS HANDOUT #A8
Note: We suggest you post this to your refrigerator or on the back of the front door.

NAME: _____ DATE: _____
 CONTACTS, PHONE #'S & RELATIONSHIP: ALLERGIES TO MEDICINES: _____
 1. _____ DATE OF BIRTH: _____
 2. _____ MEDICAL HISTORY: _____
 PHYSICIAN & PHONE: _____
 HEALTH CARE PLANS: _____ ADVANCED DIRECTIVES: _____
 (OVER)

Go to the Forms Packet and pull out the form labeled “**HANDOUT #A8 Emergency Health Information & Instructions**”.





Your Guide to Hiring & Supervising Your Own In-Home Worker
A Step-by-Step Workbook for Older Adults & Their Families



*Provided in Oregon by Multnomah County Aging & Disability Services and
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