

A Step-by-Step Guide to Training and Managing Personal Assistants: Consumer Guide

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Abstract: The first step in using personal assistance services is to decide what activities you need help with. This is called “needs assessment.” Since personal assistance routines vary so much from one person to the next, you must create a special package of checklists to meet your personal assistance needs. This list will be useful when teaching the assistant tasks and performance feedback.

Before hiring a personal assistant, you have to find one. All applicants, whether they have responded to your classified ad or have been referred by friends, family, or an ILC, should be screened before you hire them. The next task is to go over each applicant’s information, and select those most qualified. These applicants may then be invited to a personal interview, one at a time.

Before you hire, you are encouraged to conduct a background check on personal assistants who are unfamiliar to you or are strangers. You need not check the backgrounds of those whom you know very well. If you check out people close to you, you could make them distrustful of you. Ideally, you have several qualified applicants with good backgrounds from which to choose. It is a good idea for each of you to have a clear idea of duties and responsibilities. One way is to develop an employment contract. The contract should describe all aspects of your working and social (live-in personal assistants) relationship.

No matter how dependable your personal assistant is, there will be times when he or she will have to miss work. You can prepare for this ahead of time by developing an emergency back system. Keep the names and phone numbers of people you can call to fill in for your personal assistant.

Other aspects of hiring a personal assistant include payment and safety concerns. These and other employment aspects will have to be handled by you. Being an effective employer means balancing between being a dictator and being wishy-washy. Keep in mind that you are in charge of the activities performed by the personal assistant. If something goes wrong, or you are not happy with the way things are being done, it is up to you to fix it or change it. You are ultimately responsible for your own routine. If your personal assistant is not working out to your satisfaction, then try more specific feedback. An honest description of your feelings of dissatisfaction may remedy the situation, but if you are still dissatisfied, let the personal assistant go.

If you have questions, comments, or suggestions about this manual, please feel free to contact us at the Research and Training Center on Independent Living, University of Kansas, 1000 Sunnyside Ave., Room 4089, Lawrence, KS 66045-7555, (785) 864-4095.

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Introduction

In the 1970s, a group of students with disabilities in Berkeley, California, realized that they knew as much, or more, about their personal assistance needs than the medical personnel. These disability advocates thought that if they were to live as independently as possible they should be responsible for hiring, training, and supervising their personal assistants. Similarly, the Atlantis Community in Denver, Colorado, was instrumental in creating consumer choice to live in the community through personal assistance services.

In response to the lack of existing programs, disability advocates created their own. From their work, the independent living (IL) movement was born. The IL movement is based on the idea that people with disabilities (“consumers”) should be in control of personal assistance services that permit them to live independently. This notion of “consumer control” was soon applied to other services used by people with disabilities, including those provided by Independent Living Centers (ILCs).

Personal assistance is typically provided by a hired worker, who is commonly called a “personal assistant” or a “personal care attendant” (PCA). Traditionally, personal assistants were hired by an outside agency and were required by the state to be trained and supervised by a nurse or doctor. Today more and more consumers are directing their own services and oversee the selecting, training, managing, paying, and dismissing of their personal assistants. Many states are providing programs that allow consumers to control their own services and to pay their personal assistants with Medicaid funds.

This manual is based on the IL philosophy and is designed to help you train and supervise your personal assistant. It offers a model for training and supervising employees that has been used successfully in other settings. The training techniques were adapted for personal assistance services only after years of research and careful review by people who use personal assistants themselves.

This model provides guidelines on training and supervising a personal assistant. It is not designed to tell what should take place, how much, and when. These are decisions you must make. However, the manual will make it easier to make those decisions.

While this manual will be useful in learning how to train and direct personal assistance services, using personal assistance services can be challenging. In some states, there are no funds available to help you pay personal assistants. Also, because of low wages and other reasons, many personal assistants quit.

One of the beauties of the IL philosophy is that consumer control also means consumer choice. So, it is up to you to determine how much you want to direct your personal assistance services, whether you need some assistance from an agency, or whether you prefer someone else to hire and train your personal assistants. That choice also extends to the use of this manual. You may wish to adopt only some of the procedures. Keep in mind, though, that the procedures in this manual were designed as a package, and they will not work as well when separated.

Finally, we hope you find this manual helpful in learning how to train and supervise your personal assistants. Learning these procedures is not always easy. But learning how to be a good employer may help you to hire and retain good personal assistants. Remember, getting something out of this manual means that you must be willing to put something into it. That something is a willingness to give the time and effort needed to make these procedures work for you. Your investment of time now will save you a lot of time and trouble over the years.

Needs Assessment

The first step in using personal assistance services is to decide what activities you need help with. This is called “needs assessment.” Go through this list to determine how you need assistance. “Other” indicates additional activities.

Needs Assessment

Bathing

Dressing

Grooming

- a. Shaving
- b. Hair styling
- c. Applying Makeup

Housekeeping

- a. Daily
- b. Weekly
- c. Monthly

Medications

Range of motion exercises

Eating

- a. Shopping
- b. Meal preparation
- c. Clean up

Toileting

- Bowel program
- Bladder program
- Other

Transfers

- Bed to wheelchair
- Hoyer lift
- Sliding board
- Other

Wheelchair maintenance

Miscellaneous

- Recreation
- Errands
- Pet or service animal care

Other

Now you have a general list of personal assistant duties that meets your needs and can be used as a model for training and supervising a personal assistant.

Why Checklists?

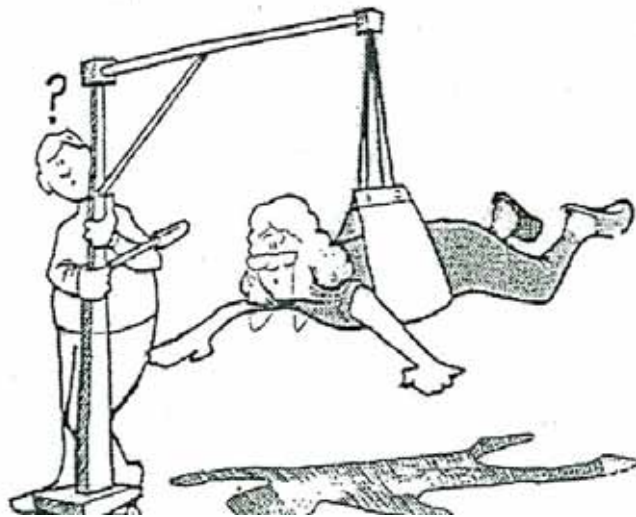
Research studies show that this system of checklists has worked well in other situations where people supervise people. One advantage is that it can help you both to train and supervise a personal assistant. The checklists in this model have several purposes:

- Checklists give a personal assistant a visual picture of what needs to be done, when it needs to be done, and in what order. This is especially helpful for tasks such as house cleaning or shopping where you cannot always watch and give instructions.
- Checklists are specific and allow you to give feedback on all aspects of a job. Usually, the only feedback personal assistants get is on poor performance – and it's usually negative. Checklists make sure that personal assistants also get positive feedback on tasks they have done correctly. Also, by pointing out individual steps that need improvement, small problems are solved before they become big problems.

Developing Procedures to Meet Your Needs

Since personal assistance routines vary so much from one person to the next, you must create a special package of checklists to meet your personal assistance needs. This can be done by you alone or with help from an independent living center staffer, a current personal assistant, a family member, or a friend.

Since these checklists will decide what duties the personal assistant will perform for you, you should be the one who ultimately decides what will be included. It's a good practice to have a checklist for each life area rather than one checklist for all tasks. See these **generic checklists** in Appendix 1 for direction when developing your own personalized procedures.



When developing individualized checklists, think about going from something very general (needs assessment) to something very specific (your own checklists.)

For example, Mary Davis likes to put her checklists into weekly groups. She puts shopping, check balancing, gas getting, banking, and menu planning on the weekly

plan. She likes to be flexible, so she uses the bathing, dressing, eating, and toileting checklists every day, and she and her personal assistant do other daily tasks, like errand running, as they arise. Both seem to get everything done to Mary's satisfaction without a checklist for each activity. However, for things that will be done regularly and for safety activities, Mary appreciates the checklist's reliability, and so does her personal assistant.

Once you have selected and arranged the generic checklists, revise them to fit your own personal assistance routine. You can do this by adding, omitting, changing, or reordering the duties on the generic checklists.

For example, a generic preparation checklist for bathing might read:

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

An individualized preparation checklist for bathing might be:

1. Select outfit chosen the day before, and lay it out in the dressing area.
2. Fill bathtub with warm water.
3. Check bathroom temperature to make sure it is at least 70° F.
4. Make sure my towels, soaps, washcloths, etc. are near tub.
5. Measure two scoops of coffee into pot and plug in.
6. Push me to the bathroom.

How Specific Should You Be?

It would be impossible for you to include every detail of every step in the individualized checklist. Exactly how Mary likes her hair blown dry and combed takes several paragraphs. But, if important information is left out, a step might not be performed properly. Here are some guidelines for developing specific steps that are not too specific:

- **Be brief.** Try to make the steps as short as possible.
- **Put steps in correct order.** Make sure the steps are arranged in the order that they will be performed.
- **Include what, when, where.** Be sure the personal assistant knows what materials are needed and when and where the job will be performed.



- **Avoid “how.”** Much of the ‘how to’ of many steps is too complicated to be put in a checklist. It should be taught by you while the task is being performed. However, mark down which steps are essential or often neglected.

Everybody’s needs are different. It is important that you are totally familiar with procedures such as catheter care, respirator care, or other health maintenance tasks. If you’re not, you may want to get some help from someone who knows about these procedures to develop these sections of your checklists.

These sample checklists group tasks in a particular area of assistance (for example, catheter care) with subroutines, which are small parts of your overall personal assistance routine. For example, catheter care is one group of related tasks in the morning routine. See examples of **sample checklists** in Appendix II. If you divide the overall routine into subroutines, you can give feedback on each task more efficiently, which will be described in more detail in the section on supervision and management.

Include All Steps

The most important thing to remember in developing personalized checklists is to make sure that each duty is included. Since some personal assistance routines have many detailed steps, you may forget some if you don’t write them all down.

One way to make sure that you have written down all steps is to record descriptions of your routines by tape recorder or video camera. Then you can use the tape or the video to develop your individualized checks. If a tape recorder or a video camera is unavailable, you could write down a description of your procedures.

Since both you and your personal assistant are physically involved in your personal assistance routine, it may be helpful to get a friend, family member, or ILC staffer to write down the steps while you list them verbally or while the routine is being performed.

If an activity cannot be recorded (for example, running errands), make a complete list of all the duties your personal assistant must perform and in what order. Don’t forget to include the final outcome of the activity. When Joe Winer asked his personal assistant to run errands, his expected outcomes included having his personal assistant return with the correct item, in this case a set of hand weights, and having the personal assistant pay the water and phone bills on time.

Hiring Personal Assistants

Before hiring a personal assistant, you have to find one. This section describes several ways to recruit potential personal assistants

1. Independent living centers

If you live in an area served by an ILC, ask center staff about personal assistant referral services. The center may have a list of names and phone numbers of potential personal assistants or offer direct provision of services instead of just referrals. No

matter which, it is up to you to screen applicants and train the personal assistant you hire to do your own assistance routine.

2. Classified ads

Many persons with disabilities think that placing classified ads is the best way to recruit potential personal assistants. They may do so via the Internet or by contacting local newspapers. How long and when you run the ad is up to you. Keep in mind that some newspapers have discounts for running ads longer and at particular times. The kind of response you get to your ad will depend on how the ad is written. Although the newspaper can write the ad for you, we recommend that you take the time to do it yourself.

Include the name of the position, a brief description of duties, and telephone numbers where you can be reached. Do not include your address in the ad to protect yourself from being target of crime. You also might want to give applicants an idea of the hours required and list any needed experience or qualifications (such as a driver's license). This will weed out unsuitable applicants.

Be clear and concise, and try to answer any basic questions an applicant might have about the job. Also, do emphasize job benefits. For example, if you are paying above minimum wage, say so in the ad. An excellent way to attract applicants is to include a bold heading describing a job benefit. Below are examples of classified ads:

***AIDE TO ASSIST DISABLED FEMALE.** Duties include personal assistance, driving, light housekeeping. 6 hrs./day, \$7.50/hr. Call Ann at 555-0734.*

***EXCELLENT FOR STUDENT** Room and board, flexible hours, assist disabled male with daily activities. 555-2439.*

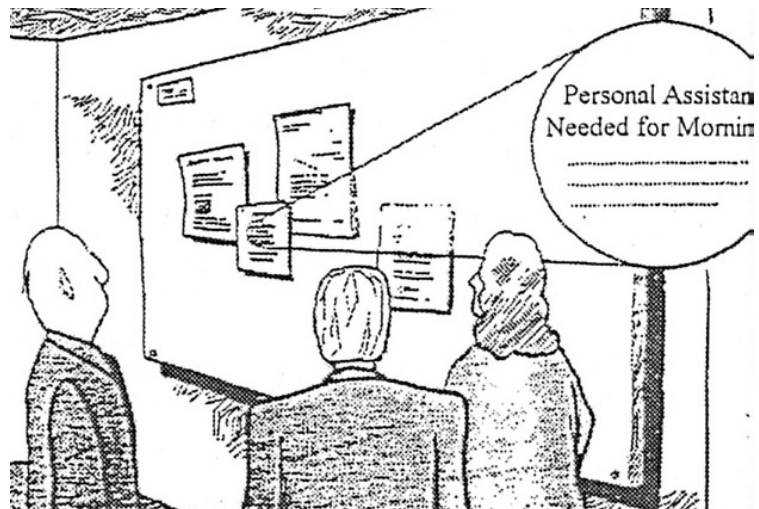
***TIRED OF MINIMUM WAGE?** \$6.00/hr., great hours, assist woman with a disability. For more information, call Mary (555-0098).*

3. Work ads

Check the ads placed by people looking for jobs. There may be a potential personal assistant among them. If people have taken the trouble to place an ad, at least you know they are willing to work.

4. Bulletin boards

Posting ads is a great, free way to recruit personal assistants. Be sure you choose the words for the bulletin board ad carefully, and place the ad on



the board at eye level, so it is easier for people to see. Make sure that the lettering, (especially the heading) on your ad is visible from far away.

Be sure to check whether your community offers an ad posting, service. When posting ads, observe any rules for using the bulletin board, and check your ads often to make sure they haven't been covered up or thrown away.

5. Family and friends

Some recommend that you not use family and friends as personal assistants because independence, consumer control, and changing relationships may become potential issues between you and your friend or family. Nonetheless, ask them to keep their eyes and ears open for anyone who may be looking for a job.

6. Colleges

Personal assistance work is often ideally suited to college students' schedules. If you plan to have a live-in personal assistant, the offer of housing in exchange for work is an excellent job incentive. Most colleges have newspapers offered free to students. Although you still have to pay for the ad, college newspapers can help you to reach a large number of potential personal assistants for little money.

Also, college campuses are usually covered with bulletin boards. Take advantage of them. Be sure to place ads in departments such as nursing, physical therapy, etc. Often, these students are looking for practical experience. Finally, call the college placement or student employment office, and ask them to post your job opportunity.

7. Local employment office

Many people who are out of work check for available jobs at the employment office. Call them, and ask to list your job opportunity.

8. Human service agencies

Recruiting potential personal assistants through human service agencies is usually not effective. However, some people with disabilities have reported finding excellent personal assistants through local agencies that find jobs for retired senior citizens. These agencies differ from city to city, so you may have to call your local Council on Aging, Association of Retired Persons, or other senior citizen group to locate the appropriate agency in your area.

Screening Applicants

All applicants, whether they have responded to your classified ad or have been referred by friends, family, or an ILC, should be screened before you hire them. The first screening step is when an applicant calls to inquire about the job. Here are some suggestions for conducting a telephone interview:

1. Answer the phone in a friendly manner.
2. Give a brief description of hours, and pay.

3. Be sure to mention that the job includes some nudity and bowel and bladder care, if it does.
4. If the person sounds interested, ask them a few basic questions:
 - Name?
 - Address?
 - Phone number?
 - Has the person had any relevant job experience?
 - Level of education?
 - Does the person have reliable transportation and a phone?
5. Ask for the names, addresses, and phone numbers of three personal and two work references. This helps with the screening process and saves time.
6. Tell the applicant you will call him or her back to schedule a personal interview when you are ready.
7. Thank the applicant for calling. Even if the applicant is unsuitable for the job, always thank the applicant for his or her interest. You may want to file the applicant's name and address; it may come in handy in the future.

Here is how Mary Davis screened a potential personal assistant over the phone.

Phone rings.

Mary: Hello.

Joyce: Hi. This is Joyce Bailey. I saw your ad in the paper, and I'm interested in the job.

Mary: Oh, that's great. Can you speak up a bit?

Joyce: Okay, is that better?

Mary: Yes. Do you know anything about personal assistance?

Joyce: Well, kind of. I have a friend who uses a *wheelchair*, and I've helped her several times when the regular personal assistant couldn't come.

Mary: This position is pretty regular. I need someone for six hours a day — two hours in the morning, and four hours the evening. If I can get someone to work for six hours, I'd prefer to hire just one person. But some people prefer fewer hours, especially on weekends. I may need to hire two people. What is your schedule?

Joyce: Well, I can work either days or evenings, but I'm not sure about both. I don't mind switching from one week to the next, and I'd like to work every other weekend.

Mary: Well, that's a possibility. Let me tell you about what I need. My personal assistant needs to help me get up in the morning, bathe me, dress me, and give me breakfast.

Mary: This routine involves bowel and bladder care, so you have to be comfortable about that.

Joyce: Yes, I see.

Mary: I also need my reading and my computer set up, so I can do my work. I help our local ILC screen consumers for some of its services.

Joyce: Okay, and the evening?

Mary: Well, I need my work put away, dinner made, served, and cleaned up, and I need to be undressed and helped to bed. I also need cleaning and shopping done on a weekly basis. There are more specifics, but the general idea. Are you interested?

Joyce: Yes, I am. I may even be willing to work both shifts, but I'd like to meet you and talk about details first.

Mary: That sounds good to me. Give me your name, address, and phone, slowly. So I can put it on my computer. Then we'll schedule an interview.

Joyce: Okay. It's Joyce Bailey, 1412 Main St., 841-7691

Mary: Would you tell me again about any experience you have?

Joyce: Oh, yes. I have been a personal assistant for Pamela L. several times, and I've also worked as an aide in a nursing home one summer. So that's something.

Mary: Yes, it is. Can you tell me about education, and most importantly, if you have reliable transportation?

Joyce: Well, I'm a sophomore at the University, and my classes are all in the afternoon. I don't have a car, but I have a bike, and I can take the bus. Are you on the bus line?

Mary: Yes, I'm only a block from the stop on Fourth Street. But it's hilly here, and your bike might not make it in bad weather. Are you willing to take the bus if you have to? Sometimes the bus takes awhile.

Joyce: Oh, yes. I sometimes do my homework on the bus, and I'm used to it.

Mary: Well, I'd like to interview you. May we meet next Thursday morning at 10?

Joyce: Well, I have an appointment at 9, and I might not make it by 10. Can we meet at 11?

Mary: That would be fine. I would like to meet you at the ILC.

Joyce: That sounds fine. I'll see you then.

Mary: Bye.

Conducting a Personal Interview

The next task is to go over each applicant's information, and select those most qualified. These applicants may then be invited to a personal interview, one at a time. If possible, schedule as many qualified applicants for personal interviews as you can.

Often, a large percentage of applicants will not show up for their interview. When inviting applicants for a personal interview, give them your name and phone number. Ask them to meet you in a public place such as the library or an ILC. Ask them to bring the names and addresses of three personal and two work references and any additional

required materials (for example, social security number). Once the applicant arrives, you are ready for the personal interview.

Sample Personal Interview

Mike: Hi, I'm Mike Smith. Why don't you sit down?

Sylvia: Thank you.

Mike: Could I get you anything to drink?

Sylvia: No, thanks.

Mike: Well, we talked a little on the phone about your experience. Could you tell me more?

Sylvia: Well, I used to volunteer in a nursing home for about a year.

Mike: What kinds of things did you do?

Sylvia: I would get things for the residents and play cards. Things like that.

Mike: Well, this job will be a lot different. My disability is a spinal cord injury, which means that I have limited use of all four limbs. The types of things I need help with are dressing, bathing, cooking, cleaning, and shopping. Actually, I have some lists here that describe exactly what you will be required to do. They are on the corner of the table. I'd like you to take a couple of minutes to read them. *(Applicant reads checklists.)*

Mike: Well, do you have any questions?

Sylvia: This section on catheter irrigation. What does it mean?

Mike: Just as I have difficulty controlling my arms and legs, I have very little control over my bladder. So, I have a catheter— a tube that goes through my stomach right into my bladder. When my bladder gets full, the urine goes out the hose and into a bag that is strapped to my leg. To keep the catheter clean, I need to have my personal assistants run a solution through the hose. That's catheter irrigation.

Sylvia: Oh, I see.

Mike: I know it sounds complicated, but if you are hired, I will train you how to do it. Do you have any other questions?

Sylvia: I don't think so.

Mike: You did notice that the job requires that you help me with some jobs where I will be nude. Does that bother you?

Sylvia: No.

Mike: Good. Now that you have seen what is required, let me tell you a little more about the job. The hours are from 7 am. to 9:30 am. six days a week. The pay is nine dollars

per hour. I expect you to show up and to be on time. If you can't show up, I expect you to let me know at least 2 days in advance, unless it is an emergency. Two unexplained absences or four days of being late, and I will have to let you go. If you quit or I have to let you go, I expect that we will give each other 2 weeks notice. Do you have any questions?

Sylvia: No, I don't think so.

Mike: Are you interested in filling out this application?

Sylvia: Sure.

Mike: (*reviews the application*) You forgot to list the address of your last employer. Do you know it?

Sylvia: I know the street, but I don't know the exact address.

Mike: Would you just write in the street?

Sylvia: Okay.

Mike: Well, everything looks in order. I have a few more people to interview before I make a decision. I have your number, and I'll let you know one way or the other by Friday. Thank you for coming. It was nice meeting you.

Sylvia: Thank you. Maybe I'll see you later.

Here are some suggestions for conducting a personal interview.

1. Greet applicant in a friendly manner.
2. Get acquainted, make small talk, describe what you need and why.
3. Give applicant the checklists to look over to describe specific duties.
4. Inform applicant of the hours he or she will be required to work and rate of pay.
5. Explain any procedures for absenteeism and tardiness. Tell the applicant that you expect a notice if he or she decides to quit and that you will do the same should you have to terminate him or her. However in extreme cases (i.e., abuse), you both reserve the right to terminate or quit without notice.
6. Ask applicant to fill out an application including the references.
7. Review application, making sure it is filled out correctly.
8. Tell applicant that you will call as soon as you make a decision.
9. Thank applicant for his or her time.

Sample Employment Application

Name: _____

Address: _____ City _____

State: _____ Zip: _____

Phone: _____ Social Security Number: _____

Are you a U.S. citizen? If no, please provide documentation that allows you to work in the U.S.

What type of transportation do you use for work? _____

Do you have a valid driver's license? _____

How many traffic violations have you had in the past year? _____

Have you ever been convicted of a felony? If yes please explain. _____

What times are you available for work?

Have you had any job experience relevant to being a personal assistant? Please explain.

If you are not hired would, you consider being an emergency backup?

Employment History

List two former employers, beginning with the most recent one, who will be contacted for references.

Employer: _____

Dates employed: _____

Position held: _____

Address: _____

Phone: _____

Duties and responsibilities: _____

Employer: _____

Dates employed: _____

Position held: _____

Address: _____

Phone: _____

Duties and responsibilities: _____

While we have provided you with suggestions of information that may be included on interviews, applications, etc., it is up to you to personalize that information to meet your own needs. Thus, you should always be thinking of ways to change what we have provided.

Reference Check

Applicant _____
Employer _____ Dates worked _____
Supervisor _____ Phone _____
Position _____
General responsibilities _____
Reason for leaving _____

What are applicant's strengths?

What are applicant's weaknesses?

How would you compare applicant's work to the work of others who have had the same job?

How dependable was applicant when working for you?

Was applicant honest?

Did applicant complain very much about anything?

How did applicant let you know when there was something he or she didn't like or didn't agree with?

How often was applicant late to work?

How often did applicant miss work?

What kind of driver was applicant? (if appropriate to former job)

Would you rehire applicant?

Do you have any other comments?

Background Check

You need to protect yourself from potential abuse or crime. Before you hire, you are encouraged to conduct a background check on personal assistants who are

unfamiliar to you or are strangers. You need not check the backgrounds of those whom you know very well. If you check out people close to you, you could make them distrustful of you. The process to conduct a background check may vary from state to state. Ask your local ILC, the state Medicaid agency, or the local police department on how to conduct a background check.

Making a Decision

Ideally, you will now have to decide between several qualified applicants. This decision is made by you, so take some time to review each application. Some suggestions to help you make your decision are provided below.

- Decide what kind of personal assistant you want. Then consider each candidate, and see how he or she meets each of your expectations. Sometimes you don't have a wide range of choices. What minimum requirements are you willing to settle for? Do you want to hire someone immediately, but continue to search for a better long-term personal assistant? Or, can you wait until the right personal assistant comes along? These are all issues you need to consider carefully.
- Check all the applicants' references. One indicator of an applicant's work performance is his or her work history. Use the reference check form to contact previous employers about dependability, performance, and other job skills. One question you may want to ask the previous employer is, "Would you hire this person again?"
- Be cautious if the person has not worked before or does not list work-related references. The applicant may have listed many personal references, but these people probably know very little about the applicant's work performance.
- Does the applicant have a phone, reliable transportation, and previous job experience related to personal assistance?
- Are you complying with the Americans With Disabilities Act? This doesn't interfere with your right to hire the best qualified applicant; it just prohibits you from discriminating against a qualified applicant or employee because of the person's disability. The ADA also requires employers to provide reasonable accommodation such as acquiring or modifying equipment or devices, part-time or modified work schedules, or making the workplace readily accessible unless this would cause undue hardship to you.

Once you have made a decision, be sure to call the other applicants and tell them you have hired someone else. You may wish to ask qualified applicants if they would be interested in working as an emergency back up. It's a good idea to keep their applications on file, because it may save you time in the future.

Hiring an Applicant

Well, you have made your decision and are ready to hire your new personal assistant. It is a good idea for each of you to have a clear idea of duties and

responsibilities. One way is to develop an employment contract. The contract should describe all aspects of your working and social (live-in personal assistants) relationship. If you are hiring a personal assistant through an agency, the agency may require you and/or the personal assistant to sign the agency's contract. See this example of a sample employment contract.

Sample Employment Contract

Employment Contract between employer _____ and
Personal assistant _____

WORK SCHEDULE (Circle the appropriate days)

Mon. Tues. Wed. Thur. Fri. Sat. Sun.

Time of day: Morning . Mid-day _____ Evening _____ Night _____

SALARY

_____ per hour _____ per week _____ per month

Cash _____ Check _____ Withholding tax _____

Room and Board: Yes _____ No _____ Meals: Yes _____ No _____

Laundry (live-in PA) Yes _____ No _____ Utilities: Yes _____ No _____

Use of personal items (list):

ACCEPTABLE SOCIAL BEHAVIOR:

Swearing: Yes _____ No _____ Smoking: Yes _____ No _____

Drinking (moderately and not while working): Yes _____ No _____

Overnight guests: Yes _____ No _____

FRINGE BENEFITS:

Employer will pay for personal assistant to accompany him or her to theater, restaurant, travel, entertainment: Yes _____ No _____

Other _____

ACCOUNTABILITY:

If personal items of value are damaged due to negligence on part of the PA, the PA will pay the damage.

EMPLOYER' S RESPONSIBILITIES: (Check appropriate items)

- _____ Employer will independently perform all tasks within his or her ability.
- _____ Employer will not expect personal assistant to stay past the agreed time (except emergency situations)
- _____ Employer will be ready to work upon the personal assistant's arrival.
- _____ Employer will make arrangements for emergency personal assistants.
- _____ The employer will maintain records on personal assistant performance.

PERSONAL ASSISTANT RESPONSIBILITIES: (Check appropriate items)

- _____ Personal assistant will honor the confidentiality of the employer.
- _____ Personal assistant will complete duties by the agreed-upon time.
- _____ Personal assistant will be on time.
- _____ Personal assistant will perform all duties as outlined in the performance checklist.

ABSENCES: The employer or personal assistant must give at least _____ (number) days advance notice of an interruption to the schedule. In case of an emergency, the employer and personal assistant must notify each other as soon as possible.

TERMINATION:

- _____ Number of absences will result in termination.
- _____ Number of tardinesses will result in termination.

Personal assistant will be reminded (number of times) of unacceptable behavior before being terminated. If the personal assistant's behavior is endangering the employer's health or safety, the personal assistant will be terminated without notice.

TERMINATION NOTICE:

Each party shall give _____ (number) weeks notice before termination.

Signature

Signature

Date

Date

Emergency Personal Assistants

No matter how dependable your personal assistant is, there will be times when he or she will have to miss work. You can prepare for this ahead of time by developing an emergency back system. Keep the names and phone numbers of people you can call to fill in for your personal assistant. Back-up personal assistants may be former personal assistants, applicants who were not hired but seem qualified, family members,

and friends. You should have these people come in frequently so that they are familiar with your routine. Also, ILCs can sometimes refer you to personal assistants. Agencies such as Visiting Nurses and Home Health Associations can also be called upon, but their services are likely to be expensive. If your personal assistant services are funded by a third party, be sure that your back-up personal assistant is enrolled with the third party so that the back personal assistant can be paid.

Some consumers employ more than one personal assistant at a time. For example, Joe W. has one personal assistant who works mornings and one who works evenings. If one personal assistant is unable to work, the other may be able to trade shifts or fill in. The important thing is that you plan ahead for emergencies.

Using the Checklists to Train Personal Assistants

Before you train your new personal assistant, decide how flexible you want to be and if you prefer a social situation or more of a professional relationship. How you train your personal assistant will influence how you interact together.

For example, Susan Rice trained her personal assistant quickly so they could get the basics done and concentrate on details as they got to know each other. Robert Jones, though, preferred to train his personal assistant step-by-step to make sure everything was done properly from the beginning.

Susan and her personal assistant took longer to work out their routine, but they are happy with their arrangement, and they share a close personal relationship. Robert is also pleased with his situation, and his personal assistant likes knowing exactly what he has to do and when.

If you are not sure of which relationship you want, it is recommended to try the professional first. It is easier to start from a professional relationship and shift to a more social-oriented situation than vice-versa.

Once you have decided on what personal training style you prefer, make sure that your personal assistant understands each item on the checklist. Concentrate on one activity at a time. One way to do this is to have the new personal assistant follow along, on the check-list while watching your former personal assistant perform the activity. Encourage the new personal assistant to ask questions about any details he or she is unsure of. If a person familiar with your routine is unavailable to serve as a model, you may want to discuss each item on the checklist with the new personal assistant before the personal assistant actually performs the activity.

You are now ready to begin on-the-job training. Begin by having the personal assistant review the checklist and ask questions about any duties he or she is unsure of. This gives the personal assistant an outline of the general steps in the task and an idea of the expected outcome. While both you and the personal assistant refer to the checklist, begin the routine one step at a time. Remember, checklists do not provide all the details about how a particular task should be performed. It's your responsibility to give instructions to make sure the personal assistant knows exactly how you want the job done.

One purpose of the checklists is to provide the personal assistant with a visual picture of what needs to be done, when it needs to be done, and in what order. You might want to think about enlarging your checklists and posting them where the personal assistant can see them while performing your routine. This is especially useful for tasks like house cleaning or shopping, where you cannot always watch and give instructions on the task being performed. Making the posters visible from a distance involves taking them to your local copy center and having them enlarged. Another possibility is to hand-print the checklist onto a piece of poster board.

You may not want to live in a house or apartment decorated with checklists. We have found several ways to post the checklists inconspicuously. For example, checklists can be posted on the back of closet and cabinet doors. During the routine, the doors can be opened so the personal assistant can see the checklist. Once the routine has been finished, the doors are closed. If this is not possible, checklists can be attached to posterboard and hung on wall hooks while the routine is performed. When you are finished, they can be taken down and stored in a closet or under a bed.

Using the Checklists to Give Training Feedback



One of the most important aspects of training your personal assistants is giving them feedback on how they perform the job. This model focuses on two types of performance feedback during training — positive and corrective. Positive feedback is simply telling the personal assistant what was done well. Research has shown that job performance improves and remains high when employees receive positive feedback on jobs they perform well.

Effective positive feedback has two basic parts: praise and specifics on exactly what was done well. For example, “My hair feels so clean, you really did a great job washing it today” is a good way to state praise. The easy part of giving effective positive feedback is saying what was done correctly. Praising good work can be more difficult. Praise involves letting another person know you are pleased. This usually consists of using adjectives such as “good” or “great.” Be careful not to always use the same adjective when giving positive feedback. If you use “good job” every time, the feedback becomes boring and mechanical, and it may lose its effectiveness. So, be creative, and don’t be afraid to use lavish praise when your personal assistant performs exceptionally well.

Here are some examples of ways to give positive feedback:

- You really did a great job of . . .
- I really like the way you ...
- The way you . . . was just the way I like it.
- You are doing. . . so much better.

- I feel so much more comfortable when you ...
- You did such a good job at . . . it will make my whole day easier.
- Wow, that . . . looks great.

The second type of performance feedback is corrective feedback. Corrective feedback explains exactly why a task was performed incorrectly and gives specific instructions on how to correct the problem. For example, ‘We need to work on combing my hair. I really prefer my part a little more to the left.’ Using corrective feedback allows you to correct errors during training in a constructive, non-punishing manner.

When giving your personal as well as corrective feedback, you should be assertive, but not punishing. During training, you are in a position to establish the tone of your future working relationship. Remember, errors made during training are usually due to your personal assistant’s unfamiliarity with your personal assistance routine. If you become angry and yell at your personal assistant, he or she is liable to become frustrated and confused about what you expect. Corrective feedback allows you to be assertive but in a constructive way.

First, you explain exactly what was done incorrectly, then you provide instructions on performing the task correctly next time. Now the personal assistant knows not only what was done wrong, but how to correct the error in the future.

If your personal assistant performs only one part of a task incorrectly, it is a good idea to mention first what was done correctly. For example, “You did a good job on my bath today, but next time, please use a little more conditioner.”

Here are some examples of corrective feedback:

- My hair is still a little wet. Next time let’s blow dry it a little longer.
- The kitchen looks really clean. Next time let’s remember to put all the food away, so it doesn’t spoil.
- When you transfer me in the Hoyer lift, be sure to put the chains facing out, so they don’t dig into my side.

When to Give Feedback

For performance feedback to be most effective, it should be given immediately after the personal assistant performs a task correctly or incorrectly. In many cases, feedback can be given during the routine. It is not necessary to give feedback about every single item on the checklist, as long as performance is correct. For example, during a bed bath, it is okay to provide positive feedback after the bath is all done. “I feel so clean. You really gave me a good bath.” However, errors should be corrected immediately. “If you don’t rinse off all the soap, I will get dry skin.”

In addition to providing feedback while the routine is being performed, we have found it helpful to schedule a daily structured feedback session during the training period. This lets you provide feedback without anyone having to think about what comes

next in the routine. It also sets the stage for the ongoing performance checks that will be explained in the supervision section of the manual.

The structured feedback session consists of sitting down with your personal assistant and reviewing that day's performance. It would be both time-consuming and cumbersome to go over every item in your routine. When you personalize your checklists, we suggest that you divide your routine into subroutines. To make the structured feedback sessions easier, you can create a "feedback sheet" such as this sample feedback sheet that lets you give and record feedback in each subroutine.

Sample Feedback Sheet

MORNING ROUTINE: BEDROOM

Date: _____

+ = Meets expectations
– = Needs improvement

Preparation + –
Comments:

Bed bath + –
Comments:

Catheter care + –
Comments:

Corset and sling + –
Comments:

Lift and lower + –
Comments:

Dressing + –
Comments:

Personal assistant's initials:

To complete your own feedback sheet:

1. Mention the first subroutine by name such as “Bathroom.”
2. Give positive feedback and place a “ + “ in the first box to the right of the subroutine name, if everything in that subroutine was performed correctly.
3. If some items in the subroutine were performed incorrectly, first give positive feedback for correct items and, then, corrective feedback for errors. For example, “You did a much better job today of preparing for the routine. You didn’t forget any materials.”
4. If even one item in a subroutine is performed incorrectly, the subroutine is scored as “Needs improvement, “ and “NP” is placed in the box right of the subroutine name. You will also notice a large empty space below each subroutine routine on the feedback sheet. This should be used for recording the specific areas that need improvement.

It may be helpful to let the personal assistant write these comments, because people seem to remember them better if they have written them down. Once you are finished with the feedback sheet, you have a written record of your personal assistant’s performance on that day.

We recommend that you go through every item during the first structured feedback session before using the subroutines to give feedback. That way you can be sure to cover every item and clarify any initial misunderstandings.

Although occasionally you might hire personal assistants who are irresponsible or don’t care, most applicants want to do a good job. A personal assistant’s ultimate job performance depends largely on how well you train him or her. Some final guidelines to follow when using checklists to train new personal assistants are listed below:

- Always refer to checklists and try to follow them closely. If you skip steps on some days, the personal assistant may have trouble anticipating when they are to be performed.
- Give feedback after every session. During training, you should review the checklist and give feedback immediately after the training session.
- Be positive. This is probably the most important thing to remember when training new personal assistants.
- Be specific and constructive. When a step on the checklist is not performed well, explain to the personal assistant specifically what parts of the task need improvement.

Examples of incorrect and correct training techniques:

Say: I don’t wash my hair on Wednesdays. So let’s skip the hair washing subroutine today.

Don’t Say: Let’s skip the last few steps today. I don’t feel like doing them.

Say: We will be reviewing the checklists after each session to make sure you really understand what needs to be done.

Don't Say: I'll talk to you about it at the end of the week.

Say: You did 10 steps correctly today. That's great.

Don't Say: You only got 10 steps right.

Say: On the hair step, I'd like the part to be more to the left side of my head.

Don't Say: You combed my hair wrong.

Daily feedback sessions should continue until the personal assistant has performed all steps on the checklist correctly for several days in a row. The next section describes how you can use the checklists to make sure your personal assistant continues to perform all personal assistant duties well.

While we hope that positive and corrective feedback can be used to handle most situations, there may be times when the personal assistant needs to be corrected more firmly, for example, when the personal assistant continually performs tasks incorrectly that he or she knows how to do, or when the personal assistant tests the consumer to see what he or she can get away with. In these cases, negative feedback will be required.

We recommend some strategies for dealing with problems that get out of hand. Talk with your personal assistant about what's been troubling you. Explain what it is that upsets you. It won't help for your personal assistant to feel defensive; that won't change the situation and is likely to make your personal assistant ignore you. One way to prevent your personal assistant from becoming defensive is to use statements that begin with "I feel." The personal assistant can't argue with you if these are your feelings. Also, try brainstorming ways that the problem could be handled. But don't forget to be firm in dealing with your personal assistant. Make sure he or she understands what's important to you and why, as well as the possible consequences of the behavior should it continue. To summarize:

- Express your concern immediately, right after the problem.
- Speak in a calm tone of voice.
- Tell the personal assistant specifically what he or she did wrong.
- Let the personal assistant know the consequences of his or her action and how upset you are.
- End by telling the personal assistant you know he or she will try to do better in the future.

Good example:

“Tim, this is the second day in a row that you have been late without an excuse. You know that when you’re late it makes me late also. I’m pretty upset about this, Tim, and if it happens again, I will have to let you go. I don’t want to do that because you are a good personal assistant. Let’s not let it happen again, okay?”



Bad examples:

“One more late time and you’re gone.”

“Your work is lousy today.”

“You’re really getting on my nerves.”

Supervision and Management

Supervising personal assistance requires feedback. However, how much and what kind of feedback you give to your personal assistant depends on his or her performance. In most employment situations, feedback is usually given only when the employee has done something wrong. The idea of checking on how someone does a job has negative connotations for many people. With this model, however, you monitor your personal assistant’s performance on a regular basis, so most of the feedback should be positive. It is up to you to overcome negative expectations by showing your personal assistant the positive aspects of the model. You start by explaining to the personal assistant exactly how the model will be used, and then you make sure you use it correctly.

The personal assistant should understand that performance checklists benefit and protect the personal assistant as well as you because:

- Checklists outline exactly what a personal assistant will be required to do.
- Checklists give a personal assistant a visual picture of necessary duties.
- Checklists correct small problems before they become big ones.
- Checklists are a clear record of past performance. Good performance records can really benefit a personal assistant when he or she requests a raise or seeks another job.
- Checklists make sure that a personal assistant will receive positive feedback for duties performed well.
- Checklists make sure a personal assistant will receive specific, constructive feedback when some parts of the personal assistance routine need improvement.

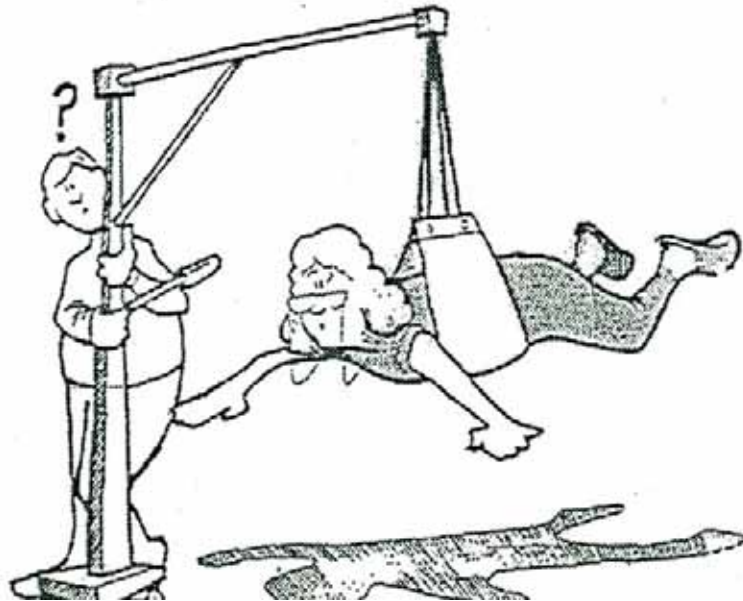
In this model, personal assistants get continuous performance feedback through the use of performance checks. These checks use the same feedback sheets you used during training to give periodic performance feedback. During the performance check, you also use the same format and scoring as you did during training.

How Often Should Performance Checks Be Done?

The answer to this question depends on each consumer and personal assistant. There is no rigid rule. Just remember, the more often performance is checked, the sooner small problems can be solved.

As a general rule, daily duties should be checked twice a month, weekly duties once a month, and monthly duties every two to three months. This does not mean that you should give feedback only during performance checks. You are responsible

for giving feedback any time a job is not performed to your satisfaction. In addition, performance checks shouldn't be the only time positive feedback is given when duties are performed well. When your personal assistant is working hard and doing a good job, a little praise goes a long way.



Another good idea is to vary the exact day that you will be conducting performance checks. Performance checks should measure personal assistant's performance on a typical day. People perform better when they are "on stage," so it's best that the personal assistant does not know he or she is being evaluated. On the other hand, you should be fair to the personal assistant and not evaluate performance only on days when personal assistance may be worse than others (for example, illness, personal problems, etc.). If you plan in advance the time that you want to evaluate the personal assistant's performance, you are more likely to get a fair evaluation.

Alternative Ways to Communicate

Do you use ways of getting your point across other than speaking? Do you use a communication board? Do you sometimes get tired repeating yourself because other people find it difficult to understand what you say? The checklists can help outline what you want in a quick, efficient way. By having your personal assistant read through the list of items on your routine, you can be sure your personal assistant knows and understands all the steps. Before assuming that your personal assistant understands, however, be certain that your personal assistant is able to read well enough.

Besides spelling out what you want in your routine, the checklists can help when it comes to feedback sessions. Instead of spending a great deal of effort and time explaining which items you are referring to in your feedback, your personal assistant can read off each item on the checklist, and you can make comments on each item as it

arises. The personal assistant can fill in the feedback spaces according to your feedback. Depending on the way you prefer to communicate, you can write up your own feedback form with a list of positive and corrective statements you are likely to make. For example, you could develop a program for the statements, "I really like the way you" and "We need to work on." Personal computers can also really help speed up communication.

You can also use photographs of particular steps to train your personal assistant in your routine that might be hard to explain or you could use a previous personal assistant to show a new personal assistant what to do. There are many creative ways you can adapt our model to help you in communicating with your personal assistants.



Who's in Charge?

Being an effective employer means balancing between being a dictator ("I'm the BOSS! ") and being wishy-washy ("Well, um, would it be okay if we worked on the routine now, if it's okay with you?"). Sometimes people find it hard to get used to the idea of being in charge.

Keep in mind that you are in charge of the activities performed by the personal assistant. This is important to remember, because if something goes wrong, or you are not happy with the way things are being done, it is up to YOU to fix it or change it. You are ultimately responsible for your own routine. If your personal assistant is not working out to your satisfaction, then try more specific feedback. An honest description of your feelings of dissatisfaction may remedy the situation, but if you are still dissatisfied, let the personal assistant go. Don't forget, however, that you will need to hire another personal assistant. This is when a good system of back-up personal assistants is especially useful.

Of course, being in charge does not mean forgetting that your personal assistant is a person, too, not just an employee. Having respect for your personal assistant can do a lot more for your relationship than yelling (or passive acceptance.) Treating your personal assistant with respect can also be the first step in having the personal assistant treat you with respect.

Try to see your personal assistant's job from his or her eyes. Lack of benefits, no job advancement, little or no support system — it's no wonder that care worker turnover continues to be a problem.

In the "Personal Assistance Services" article by Marilyn Hammond featured in the June 1999 *New Mobility*, Jim Mowrey spoke of having the same attendant for seven years. "One piece of advice is get to know your attendant and what is important to him or her. My attendant has a thing about being respected. So I always give him time off for his family, I pay him as well as possible and I treat him like a friend. It is almost like a marriage in that you just have to respect each other."

Gordon Palmer, another person featured in the story said he tries not to ask one person to do too much. Palmer has one person who just works Monday through Friday mornings and has for five years so he hires somebody else to do weekend mornings and another for nights.

“This method results in more employees, but has advantages. More people are more likely to notice more things, such as a pressure sore developing or an overlooked detail. When somebody quits without notice or you have to fire somebody, you're not stranded,” Palmer said in the article.

The Intimate Side of Life

Let's say you've just met someone you're interested in romantically. A nice dinner, candle light, soft music. You go back to your place for some private moments, and your personal assistant shows up ready to do your evening routine. What do you want your personal assistant to do? Take the night off and leave you alone? Your partner can help with the routine. Or maybe you prefer your personal assistant to interrupt you and complete the routine. That way you can resume your privacy without having to ask your partner to perform your personal routine tasks. Either option is just fine; it's up to you.

But how is your personal assistant supposed to know which scenario you prefer? As the employer, it is up to you to make sure you explain clearly what you want and expect your personal assistant to do. The personal assistant won't know unless you tell him or her. It is part of your job as a responsible employer. You can always place a sign on the door, “Please knock before entering,” or “Please take the night off, and I'll see you tomorrow.” Or more importantly, let the personal assistant know in advance. Open communication solves a lot of problems.

Ending Employment

J. Price, author of *Avoiding Attendants From Hell: A Practical Guide to Finding, Hiring, and Keeping Personal Care Attendants*, said often the decision to fire an employee isn't clearcut. Fear of abuse or abandonment, too, can cloud judgment. When there is a problem, he suggests you process anger before talking about the problem with the employee. Be calm. Have a back-up assistant ready if the employee immediately quits. Choose a private, quiet place for a face-to-face discussion. Plan what you are going to say. Stay on track during the conversation and try to begin on a positive note.

Ask yourself whether workable solutions are possible? Is a schedule change helpful? If all else fails during the conversation, ask if the person wants to leave. Sometimes employees who want to leave will do things that will cause you let them go. If this is the case or problems can't be resolved, it is best for both of you to terminate the relationship.

Assistants, too, may give you notice of their desire to quit working. The top 10 reasons why care assistants quit their jobs, according to *Home Health Aides: How to Manage the People Who Help You*, are:

- The initial job description was incomplete and changes too often.
- Duty organization is illogical, inefficient, and time wasting.
- The work environment is messy and disorganized.
- Inefficient pay or lack of appreciation.
- Another assistant is preferred.
- The employer is too passive or aggressive.
- The employer is dishonest about salary, hours, etc.
- There are unreasonable duties.
- The employer is intolerant.
- There is a lack of respect for assistant's personal life.

Paying Your Personal Assistant

There are two basic methods for paying personal assistants. You can either receive funds from another source (such as Social Services, Medicaid, Veterans Administration), or you can pay for your personal assistant out of your own pocket. Programs to fund personal assistance vary widely from state to state, and in some states, there are no programs at all. Most programs usually require that you meet a minimum income standard, which is often very low.

Medicaid is the primary funding source of personal assistance services for individuals with disabilities who have low incomes. Through Medicaid, states can choose to offer personal assistance or not. Most states do through their personal care services (PCS), which only cover attendant care. Or states offer Medicaid's 1915c home- and community-based services (HCBS) waiver programs that offer more care, services, and products determined by service providers. Some state Medicaid programs are trying Cash and Counseling Demonstration Evaluations through special waivers from the Health Care Finances Administration (recently renamed CMS (Center for Medicare and Medicaid Services) that allows individuals receiving Medicaid benefits to get money directly for buying personal assistance services instead of services through a care agency. ADAPT, a disability organization advocating for the U.S. government to provide personal assistance, has lobbied for years to set up a national program of community-based attendant services and supports for people with disabilities, regardless of age or disability type that will help them to avoid institutionalization to obtain needed care.

Whether you pay for your personal assistance or your services are funded through a third party, someone must assume the responsibilities of employer. In most cases, if you pay your own personal assistant out of your own funds, you are the employer. However, in some states, even if you receive funds from another source, legally you may be considered the employer. Please consult a certified public accountant, tax consultant, or lawyer, if you have questions about paying your personal

assistant or taxes. Your local independent living center may also provide information on this topic.

Employee? Subcontractor? The federal government Common-Law Rules decides which by looking at the relationship of the worker and the business, in particular the behavioral control, financial control, and the type of relationship of both. For example, if you direct and control how the personal assistant worker does tasks, then the personal assistant would be considered an employee. If you train someone to do a task in a certain way, then the trained person would be an employee; independent contractors do tasks their own ways. The IRS has ruled that home-based service workers such as personal assistants are employees, not independent contractors. If you are confused about your personal assistant’s employment status, file IRS Form SS-8, Determination of Employee Work Status for Purposes of Federal Employment Taxes and Income Tax Withholding. Please note that some basic information may vary from state to state, and it is up to you to determine your responsibilities in your situation. What is most important, is that employer responsibilities be determined and delineated for all parties; ensure that taxes and Worker’s Compensation are paid; and follow the rules of the program required by the funding source.

To determine whether your state has a personal assistance program, call an ILC in your state to check on any changes. If you are a veteran, call your nearest chapter of Paralyzed Veterans of America. They will advise you on veteran’s benefits for paying personal assistants.

Record Keeping

No matter how you pay your personal assistant, keep employment records. In addition to your performance checklists, you will need a record of the hours your personal assistant worked and how much he or she has been paid. This may seem unnecessary if you receive funds, but if any questions arise concerning who worked when, these records such as this **Sample Monthly Time Record** can really come in handy.

MONTHLY TIME RECORD									
Pay period _____ thru _____									
Personal assistant _____									
DATE									
HOURS									
DATE									
HOURS									
Total hours worked _____ (hourly salary) x _____ (total paid) = _____									
Personal assistant’s signature _____									

Receiving Funds From Another Source to Pay Personal Assistants

To protect you and your personal assistant, understand the policies, procedures, and limitations of your funding source. The following is a list of questions that you should ask before receiving funding:

- Who is eligible to receive funding?
- Where and how do I apply?
- How much money can I receive?
- Who is responsible for hiring, training, and supervising my personal assistant?
- When I hire a personal assistant, what information do I need to provide?
- What information does the personal assistant need to provide?
- How much and how often is my personal assistant paid?
- How is the money dispersed? Do I receive the check? Does it go directly to my personal assistant?
- What kinds of tasks is my personal assistant allowed to perform? (Some sources do have limitations.)
- If I or my personal assistant is injured on the job, who assumes liability? Do I need liability insurance?
- Does this change if the personal assistant works outside of my home, such as driving me to the doctor's office in his or her vehicle?
- Are there any regulations regarding a personal assistant driving my personal vehicle?
- Do I have to pay taxes, Social Security, unemployment, Worker's Compensation, etc. to receive funds? If so, when?
- Is my personal assistant required to declare the income on federal/state taxes? What records do I need to keep?

Liability

When employing personal assistants, liability is a critical factor. What would happen if your personal assistant is injured on the job? If you are receiving funds, make sure that the funding source also takes care of any liability issues. Ask it to explain procedures for you and your personal assistant, in the event your personal assistant is injured. If your funding source does not cover liability or you are paying your own personal assistant, you must protect yourself because your personal property may be attached under circumstances of liability. First, call your insurance agent, and inquire whether your homeowner's or renter's insurance covers property damage or personal injury incurred by an employee (your personal assistant). If not, you need to improve your coverage.

One alternative to higher insurance premiums may be Worker's Compensation, which is insurance paid by employers that provides medical care to employees injured on the job. The program varies from state to state and is administered by the state Worker's Compensation Board. It may turn out that Worker's Compensation is cheaper than upgrading your insurance. To find out, simply contact your local Worker's Compensation office.

Paying Your Own Personal Assistant

If you can pay your own personal assistant, your payroll responsibility as an employer increases. These added responsibilities include:

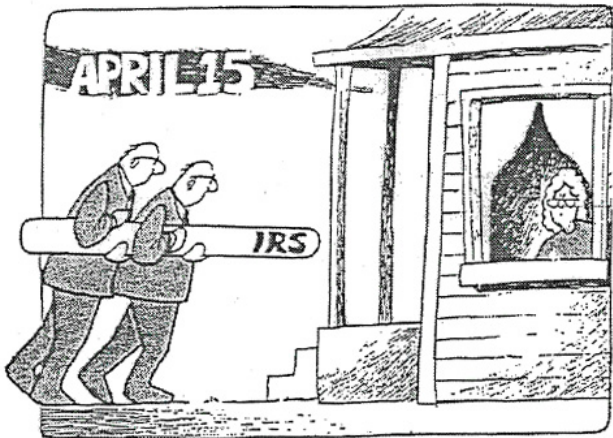
- **Minimum Wage.** Personal assistants are considered typically are covered by the minimum wage guidelines of federal and state law. In 2005, the federal minimum wage for nonexempt employees was \$5.15 per hour. However, many states also have minimum wage laws. If so, the personal attendant is entitled to the higher of the two minimum wages, according to the U.S. Department of Labor.
- **Social Security tax.** If you paid your personal assistant \$1,400 or more in cash wages during the year, the wages are covered by Social Security. The tax rate changes periodically, so contact your Social Security office to get the most recent rate.
- **Federal unemployment tax (FUTA).**
- **Federal income tax.**
- **Any state taxes.** Employer responsibilities differ from state to state unemployment or Worker's Compensation office. For example, the state of Massachusetts began taxing personal care assistants in February of 1999 stating that personal care assistants should be considered similar to nannies or gardeners. That state pays assistants directly and withdraws taxes directly from personal care assistants' check. Before, workers were paid directly and had to pay their own state unemployment insurance and Social Security taxes.

Payroll responsibilities will require a substantial amount of paperwork. Contact an IRS representative so see what forms you need to submit to it and your personal employee. Also find out whether you will need a federal Employer Identification Number (EIN), SS-4. Your state may require that you have a state employer identification number.

Sound overwhelming? The good news is that many states have set up intermediary services to reduce the employer burden while making sure there is compliance with federal, state and local program, tax and labor rules and regulations. They act as a "bank" receiving and distributing public funds for personal assistance services, manage payroll, process payment of insurance benefits, and manage other responsibilities. Some independent living centers have set up programs to handle these responsibilities for consumers using personal assistance. The downside of this is that most programs place limits on the hourly wages paid to personal assistants in order to cover administrative expenses.

Another way to avoid much of this paperwork is to pay your personal assistant noncash wages. Noncash wages can include room, food, electric power, or other commodities. In paying noncash wages, it is important to keep detailed records, receipts, bills, and payment checks. When your personal assistant quits, it is also useful to have him or her sign a statement listing the exact amount of the noncash wages they received while employed. If you pay noncash wages, your responsibilities include:

- Insuring that each personal assistant has a Social Security number.
- Filing a W-2 Form once a year listing the value of noncash wages paid.



If you choose to pay noncash wages, be advised that a considerable amount of homework should be done to determine your responsibilities in your particular situation. Worker's Compensation, taxes, and liability are issues to be addressed when you pay noncash wages. We strongly urge that you call your local IRS office to check on its latest policies.

If you pay for your personal assistant in noncash commodities (i.e., room, board), you may deduct any cost of items or services offered to the personal assistant that you and/or your family would not normally need. Examples include: extra rent, food, utilities, etc. Be sure to keep detailed receipts, canceled checks, and bills. Remember, you may only deduct the amount that you would have paid your personal assistant in cash wages. In addition to personal assistance-related deductions, you may also be eligible for the deductions described in the Cash-Wage section.

Keeping Track of What to Do When

Using personal assistance services creates added paperwork and responsibility. It is important that record keeping, taxes, and so on be completed on time. One way to remind yourself of upcoming tasks is by using a tickler file. You can make a tickler file, using index cards and a box to keep them in.

To do so, first make a list of all paperwork and deadlines. Then, transfer this information to index cards using the format below:

Deadline: January 31

Task: Send W-2 forms to all personal assistants employed last year

The index cards can then be arranged by date in an index card box. Depending on your deadlines, you can organize your tickler file by days, weeks, or months.

To use the file, simply check the file on a regular basis (that is, daily, weekly, monthly), and pull out the cards for tasks that need to be completed for that day, week,

or month. Post the cards someplace where you will be sure to see them on a regular basis. When you have completed the task, put the card back into the tickler file under the appropriate date. In addition to financial reminders, the tickler file can be used to remind you when to order medicine or medical supplies, when maintenance is needed on adaptive equipment, or of upcoming appointments or meetings. If you physically cannot remove cards from a box, you may use a Rolodex file instead, or simply have your personal assistant read and post the card for you on a regular basis. In addition, the cards may be offered in Braille for persons with visual impairments.



Avoiding Rip-off by Personal Assistants

A good personal assistant can substantially increase your independence. However, not all personal assistants turn out to be good ones. There are a lot of disincentives to working as a personal assistant such as low pay, few hours, no benefits, and few opportunities for career advancement. In some cases, personal assistants view consumers as people who can easily be taken advantage of. This is especially true in situations where personal assistants are handling your money, using your van, or buying and dispensing your medication.

While there is no way to absolutely ensure that you won't be ripped off by a personal assistant, there are a few common steps you can take to minimize the risk. We sent a survey to 91 personal assistant users asking them for tips on precautions they take to avoid being ripped off.

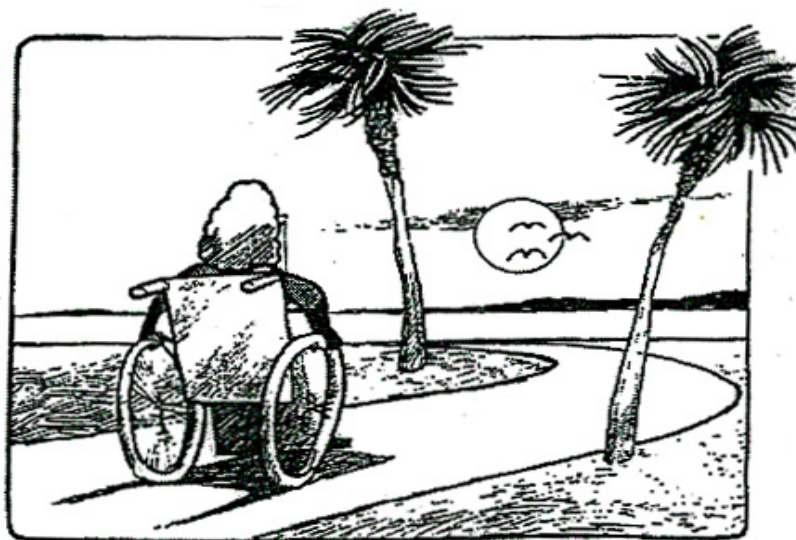
Here are their suggestions:

- **Screen personal assistants thoroughly.** This means never hire someone until you have had an opportunity to check their references. Also, if they have worked for other consumers, it's a good idea to call those consumers to see whether they had any problems with the personal assistant.
- **Never leave valuables lying around.** The most common items stolen are jewelry and money. Always lock your jewelry in a safe place. Most consumers from the survey suggested keeping your money with you at all times. Make sure you carry your money somewhere on the front of your chair so you can watch how much your personal assistants remove when they are taking money to make requested purchases.
- **Keep track of your medication.** Always keep your medication locked up when you don't need it. Also, keep track of how much you order and how much you use. For example, if you order fifty pills and you take two per day, you know they will last 25 days. You can then mark on the calendar when you should be out. Another tip is to have your pharmacy deliver your medication rather than letting your personal assistant pick it up. Only buy the amount of medication you'll need for a monthly period. This will keep a lower dosage of meds around, and be easier to keep track of.

- **Avoid letting your per assistant write checks or withdraw money for you.** One of the easiest ways for personal assistants to steal money is to forge checks. Never give personal assistants access to your checkbook or bank cards when you are not around. If you must let them write a check, give them one at a time, and make sure they bring back a receipt for the amount of purchase. Better yet, have things like groceries delivered, or go to the store with your personal assistant. Finally, never get a joint checking account with your personal assistant because legally they can draw money from your account without having to pay you back.
- **Never give your credit card to your personal assistant to use.** A credit card is one of the simplest ways a personal assistant can rip you off. Your personal assistant can make purchases, sign your name, and be in the next state before your bill comes, and you realize what has happened. Also, once your personal assistant has your credit card number, he or she can order thousands of dollars worth of merchandise over the phone. Remember, giving your credit card to your personal assistant is an absolute no-no.
- **Avoid letting your personal assistant use your property for his or her personal use.** Many users who responded to our survey reported they were ripped-off through the abuse of personal property. This includes use of your van, phone, and apartment. Also, if you have a live personal assistant, establish some rules about bringing friends over to “hang at your home or apartment. Rules might include guidelines about such things as length of time and time of day or night friends may visit, food they may eat, etc.
- **Be sure to get your key back when a personal assistant quits or is fired.** Many people with severe disabilities must provide their personal assistant with a key to their home. When a personal assistant leaves your employment, make sure the assistant turns in the key before you give them their last paycheck. If they don’t, have your locks changed immediately. Have all issued keys stamped with “Do Not Duplicate” on them. One tip provided by a survey respondent suggested having two locks on your door, only one of which your personal assistant can open. This allows you to lock your house when you leave so that even your personal assistant can’t enter.
- **Keep an eye on things.** From the first day, let your personal assistant know that you will be keeping track of medication, van miles, phone calls, etc. In your contract with your personal assistant, make it clear what will happen if he or she is caught stealing. Running your personal assistant services in an organized, businesslike fashion may deter personal assistant rip. Remember, people steal because they think they won’t get caught.

We hope these suggestions are useful in avoiding personal assistant rip-off. However, if you are ripped off, confront the personal assistant to get their side of the story. If it is clear that they took something, call the police. If you are afraid that the personal assistant will harm you, let the police know. Also, call your local ILC to report the incident. Maybe you can prevent someone else from being ripped off. Finally, several of the people who responded to our survey said they let incidents of petty theft go on, because they were afraid they would not be able to find a new assistant. Please,

don't remain in an abusive situation. Call your local ILC or another social services agency that can assist you in locating an emergency personal assistant.



Conclusion

Well, that's it. Everything you wanted to know about consumer direction of personal assistant services. The road to increased independence is a long one. We hope the procedures described in this manual make your journey a little easier.

Appendix 1

Generic Checklists

I. BATHING

A. Preparation

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

B. Routine

1. Assist in clothing removal
2. Move from bed to bath
3. Wash and rinse body
4. Assist with hair care
5. Move from bath to dressing area
6. Dry body thoroughly
7. Conduct health check (e.g., check for pressure sores)
8. Apply lotion or powder
9. Apply deodorant, makeup, and shave
10. Assist in dressing
11. Assist with bed and bowel care
12. Move to wheelchair
13. Assist with dental care
14. Move to breakfast area

C. Clean up

1. Put away all materials
2. Clean bathroom
3. Clean and disinfect bladder and bowel care materials

II. HOUSEKEEPING CHECKLIST

A. Daily checklist

Bathroom

1. Put dirty laundry in specified place
2. Hang wet then dry
3. Return needed materials to specified place (shampoo, makeup, etc.)
4. Clean the tub/shower
5. Flush and wipe toilet
6. Mop excess water from floor

Kitchen

1. Return uneaten food and food preparation articles (spices, oil, etc.) to specified place.
2. Wash dishes and pots.
3. Wipe surfaces (stoves, counters, table, etc.).
4. Clean floor

Bedroom

1. Make bed, changing linen, if needed
2. Put dirty clothes/linen in specified place
3. Return articles (clean clothes, slippers) to specified place
4. Empty and clean bedside toileting equipment

Living area

1. Straighten furniture and return all out articles (magazines, newspapers, dishes, etc.) to specified place
2. Water plants and feed pets as needed

B. Weekly checklist

1. Clean floors
2. Dust furniture
3. Clean sinks, bath, and toilet
4. Launder dirty clothes and linen to specifications
5. Mow grass and do needed yard work
6. Check and service assistive devices including wheelchair

C. Monthly checklist

1. Wash windows, if specified
2. Clean wheelchair
3. Wash automobile

III. MEDICATIONS

1. Prepare medications at proper time
2. Prepare correct dosage
3. Have materials necessary for giving medicine available
4. Administer medication according to instructions
5. Inventory medications and report shortages
6. Return medications to specified area

IV. RANGE OF MOTION

1. Make sure clothing allows observation of the motion and does not restrict motion
2. Use good body mechanics to conserve consumer's energy and to avoid strain and possible injury

3. Hold the extremity at the joint unless otherwise specified (e.g., arthritis)
4. Use a firm, comfortable grip
5. Perform motion smoothly, slowly, and rhythmically
6. Do not cause pain by exceeding consumer's range of motion
7. Repeat motion three times
8. Perform exercises in specified order
9. Report any changes in range of motion

V. EATING CHECKLIST

A. Shopping

1. Stay within allotted budget
2. Buy specified items
3. Purchase brand names indicated
4. Immediately put items in appropriate place

B. Meal preparation

1. Wash hands thoroughly
2. Prepare food in reasonable time
3. Prepare specified food (preference, special diet)
4. Prepare and serve food using specified spices, condiments, etc.
5. Serve food in sanitary manner
6. Serve food at desired temperature
7. Serve food in desired portions
8. Ready all assistive devices used in feeding
9. Assist with feeding as specified
10. Use specified feeding position
11. Take sufficient time between bites
12. Put small pieces of food on spoon or fork for easier swallowing
13. Serve liquids at desired times
14. Assist in personal clean
15. Transfer to desired location
16. Clear and clean table thoroughly
17. Clean table as outlined in housekeeping procedures

VI. TOILETING

A. Bowel program/Digital stimulation

1. Wash hands
2. Ensure privacy
3. Bring necessary materials to bedside
4. Put sterile rubber glove on the hand to be used for stimulation
5. Use sufficient lubrication on gloved index finger
6. Insert finger into rectum one inch
7. Use a gently rotary motion toward the backbone
8. Gently pull rectum to one side while evacuation is occurring
9. Repeat process until bowel is empty

10. Clean rectal area with toilet paper
11. Wash area with soap and water and dry with towel
12. Dispose of refuse as specified
13. Return materials to appropriate place
14. Wash hands

Suppository insertion

1. Wash hands
2. Ensure privacy
3. Bring necessary materials to bedside
4. Use specified positioning technique
5. Put sterile rubber glove on the hand to be used for insertion
6. Lubricate suppository
7. Separate buttocks
8. Insert suppository into anus pointed end first using gentle pressure.
9. After evacuation dispose of refuse as indicated
10. Return materials to appropriate place
11. Wash hands

B. Bladder program/External catheter--condom type

1. Wash hands
2. Ensure privacy
3. Have necessary materials within reach
4. Remove used catheter by loosening the tape making sure to cut any hairs caught in the tape
5. Loosen rubber tube from the plastic drainage tube
6. Discard used condom and tape as specified
7. Remove tubing and collection device
8. Wash and disinfect tubing and collection device
9. Wash and rinse genital area, especially penis shaft
10. Roll condom catheter over penis slowly to eliminate air bubbles
11. Follow manufacturer's instructions for application tape being careful not to tape hairs
12. Apply tape tightly enough to backflow, but not so tight as to impair circulation
13. Connect catheter to tubing leading to collection device.
14. Return materials to appropriate place.
15. Wash hands

Retention catheters

1. Wash hands
2. Ensure privacy
3. Place individual in appropriate position
4. Thoroughly clean genital area
5. Pour antiseptic solution onto cotton balls
6. Cleanse area with antiseptic
7. Lubricate catheter and insert gently

8. Inflate bulb with appropriate amount of water
9. Tape catheter to body in correct position
10. Apply necessary dressings
11. Wash hands

Catheter irrigation

1. Wash hands
2. Ensure privacy
3. Place materials within reach
4. Place towel under catheter
5. Pour sterile solutions over area
6. Clean hands with alcohol wipes
7. Clean catheter union with alcohol wipes
8. Disconnect tubing using dry sterile gauze for each end
9. Cover open end of tubing with sterile gauze
10. Irrigate with specified solution.
11. Wait for bladder to relax and do not force solution
12. Disinfect end of tubing
13. Reconnect tubing
14. Wash and disinfect equipment
15. Wash hands

Ostomy appliance

1. Wash hands
2. Ensure privacy
3. Apply adhesive solvent to edge of appliance
4. Gently remove appliance.
5. Clean all adhesive residue from skin using solvent
6. Check for and report any signs of irritation or grayish areas
7. Attach plate to skin using adhesive
8. Make sure no urine gets on skin
9. Center and place appliance directly over stoma
10. Attach belt to appliance
11. Wash hands

Disinfection of collection bags and tubing

1. Wash hands
2. Empty contents into toilet
3. Rinse bag and tubing with cool water repeatedly
4. Thoroughly wash bag and tubing with hot soapy water
5. Fill bag with soapy water and soak ten minutes
6. Empty bag
7. Fill bag with disinfectant
8. Remove drainage tube and cap
9. Soak tubing and cap separately
10. Empty bag

11. Soak bag and tubing in disinfectant for twenty minutes
12. Drain bag and tubing completely
13. Hang to dry
14. Discard used solution
15. Wash hands

PH check

1. Wash hands.
2. Ensure privacy.
3. Disconnect catheter from drainage unit using sterile gauze
4. Collect approximately five cc of urine in small container
5. Dip tip of PH paper in urine before two minutes has expired
6. Check color of PH paper against color code
7. Chart and report results
8. Wash and disinfect materials
9. Discard refuse
10. Wash hands

VII. TRANSFERS

A. Bed to wheelchair

1. Position chair at right angle to bed
2. Lock wheels of wheelchair
3. Prepare chair
4. Raise footrests
5. Fold back bed clothes
6. Assist to sitting position as specified
7. Assist to standing position
8. Pivot and ease into wheelchair
9. Position feet and legs correctly
10. Ask if consumer is comfortable before leaving or continuing

B. Bed to wheelchair, Hoyer Lift

1. Position chair correctly
2. Lock wheels of wheel chair
3. Fold back bedcovers
4. Roll consumer to his or her side, using proper technique
5. Position sling correctly
6. Roll consumer onto sling properly
7. Hook chain in correct holes with hooks facing away from body
8. Lift gently and smoothly
9. Push lift smoothly to wheelchair
10. Center consumer's body over wheelchair
11. Ensure proper positioning while lowering
12. Unhook chains carefully
13. Return lift to specified area
14. Ask if consumer is comfortable before leaving or continuing

C. Sliding board transfer

1. Remove armrest of wheelchair
2. Place chair next to surface and lock
3. Place board on both surfaces and under buttocks
4. Support back with knees to prevent sliding
5. Stand on side toward which consumer is moving
6. Move buttocks along board
7. Position consumer comfortably

VII. WHEELCHAIR MAINTENANCE

A. Manual wheelchairs

1. Tighten handgrips
2. Check and lubricate chair locks
3. Check tire and inflate if necessary
4. Tighten spokes
5. Check handgrips
6. Check and tighten all upholstery screws
7. Clean upholstery
8. Check and lubricate frame
9. Wax metal parts

B. Motorized chairs (to be done in addition to above tasks)

1. Check all electrical connections
2. Check and tighten all belts
3. Check water level in battery
4. Clean battery terminals

Appendix II

Sample Consumer Checklist One

MORNING ROUTINE: BEDROOM

Preparation

1. Assemble all materials (soap, cotton balls, washcloth, towel, peroxide, drainage sponge).
2. Fill washbasin for bed bath.

Bed bath

1. Wash front of body with soapy washcloth.
2. Rinse front of body.
3. Dry front of body thoroughly.
4. Roll on right side and wash back of body.
5. Rinse back of body.
6. Dry back of body thoroughly.
7. Roll onto back.
8. Put lotion on feet.

Catheter care

1. Remove catheter bandage.
2. Cleanse around catheter with peroxide.
3. Replace catheter dressing.
4. Put on Ted hose.
5. Empty and rinse out washbasin in bathroom.
6. Check if leg bag has been cleaned.
7. Bring leg bag back from bathroom.
8. Strap on leg bag.
9. Disconnect night bag hose, being careful not to spill urine.
10. Sterilize tip of leg bag with peroxide and attach to catheter hose.
11. Empty and rinse out nightbag and hang to dry.

Corset and sling

1. Slide corset under body.
2. Adjust and position corset as instructed.
3. Hook corset.
4. Put pants on.
5. Check leg bag and hose to make sure they are not crimped.
6. Roll onto right side and slide sling under body.
7. Roll onto back and adjust sling as instructed.

Lift and lower

1. Disconnect battery charger from wheelchair.
2. Position wheelchair correctly.
3. Make sure wheelchair brakes are locked.
4. Unhook footrest strap.
5. Lift footrests.
6. Roll Hoyer Lift to bedside.
7. Separate legs of Hoyer Lift.
8. Hook chains to bottom and top holes of sling with hooks facing out.
9. Raise bed to correct position.
10. Close valve on lift and pump handle to lift.
11. Swing body so legs straddle main post of lift.
12. Roll lift and position body over wheelchair.
13. Lower body until buttocks touch chair.
14. Grab back of pants and pull back into wheelchair.
15. Open valve n lift and lower into chair.
16. Check leg hose to make sure it's not crimped.

Dressing

1. Lower footrests.
2. Put on shoes.
3. Swab face, back, and neck with alcohol.
4. Put on deodorant.
5. Tape down loose corset straps.
6. Put shirt on.
7. Put gloves on.
8. Put on glasses.
9. Fasten wheelchair seatbelt.
10. Put footrest strap on wheelchair.
11. Release wheelchair brakes.
12. Arrange bedroom as instructed.

MORNING ROUTINE: BATHROOM

Preparation

1. Remove glasses.
2. Drape towel around neck.

Hair care

1. Wet hair with washcloth.
2. Shampoo hair.
3. Wash beard as needed.
4. Remove most of lather with dry washcloth.
5. Rinse hair with wet washcloth.
6. Dry hair with blow

7. Comb beard and hair as instructed.
8. Put on glasses.

Dental care

1. Drape towel over front of chest.
2. Put toothpaste on toothbrush.
3. Put toothbrush in holder.
4. Fill glass with water to rinse out mouth.
5. Remove brush and holder.
6. Rinse out toothbrush.

Clean up

1. Put away all materials.
2. Clean bathroom as instructed.
3. Arrange house objects as instructed.
4. Dust and straighten as needed.
5. Vacuum as needed.

MORNING ROUTINE: KITCHEN

Preparation

1. Boil water for coffee.
2. Give medication with cranberry juice.
3. Clean glasses.
4. Serve coffee.
5. Prepare breakfast as instructed.
6. Prepare daily drinking water.

Food service

1. Serve breakfast (with set-up spoon).

Clean up

1. Clean off table, when instructed.
2. Wash dishes and wipe off counters.

EVENING ROUTINE: BEDROOM

Preparation

1. Give medication.
2. Prepare medication for the next day.
3. Empty legbag while it's still on (when requested).
4. Take off glasses.
5. Take off gloves.
6. Take off shirt.
7. Take off shoes.

8. Swab face, neck, and back with alcohol.
9. Position pillows in bed.

Lift and lower

1. Roll Hoyer Lift to wheelchair.
2. Separate legs of Hoyer Lift.
3. Hook Hoyer Lift chains to top and bottom holes of sling with hooks facing out.
4. Undo seat belt.
5. Close valve and pump handle to lift.
6. Roll lift until body is positioned above bed with head as close as possible to headboard.
7. Lower into bed.
8. Unhook and remove lift.

Undressing

1. Unhook.

Sample Checklist Two

MORNING ROUTINE @ 8AM

1. Enter bedroom.
2. Read ventilator press gauge to be sure pressure is between 8 and 12.
3. If over 12, alert me.
4. Say "hello" to awaken.
5. Loosen straps on facemask.
6. Lift mask and turn off ventilator.
7. Remove mask.
8. Put on clean socks.
9. Help to rise to seated position.
10. Remove T-shirt.
11. Apply underarm deodorant.
12. Put on clean t-shirt.
13. Put on backbrace.
14. Transfer to green wheelchair.
15. Move to toilet.
16. Close and lock window.
17. Straighten sheet and blankets.
18. Empty and refill bedside carafe with water.
19. Empty and rinse out urinal.
20. Attach toilet paper to clean and dry urinal.
21. Return urinal to bedside.
22. Make a cup of tea.
23. Assist in moving from bathroom to living room.
24. Serve tea.
25. Clean ventilator circuit.
26. Move to toilet when instructed.
27. Finish cleaning ventilator circuit.

28. Move to bedroom.
29. Assist with putting on shirt, pants, and shoes.
30. Move to bathroom.
31. Assist with: shaving (on non days); washing face; combing hair; brushing teeth; and applying skin medication.
32. Transfer to black wheelchair.
33. Place lunch and thermos in backpack, if needed.
34. Assist with coat or other appropriate out-of-doors clothes.
35. Enter arrival and departure times on log.

Bathing (see bathing checklist)

1. While lying in bed, put on clean underpants and socks.
2. When seated on bed, put on back brace.
3. Transfer to green wheelchair.
4. Move to toilet.
5. Make tea.
6. Clean cir
7. Lay out clothes as instructed.
8. Bring clean T-shirt and deodorant into bathroom.
9. Move into hall, turn chair around.
10. Assist in shaving.
11. Move back into bathroom.
12. Assemble towel, soap, and shampoo.
13. Move wheelchair up to Tubby seat.
14. Place left foot in tub.
15. Assist in slide transfer onto Tubby seat.
16. Place plastic splash cloth in position.
17. Remove underpants, back brace, and T-shirt.
18. Adjust water temperature.
19. Shampoo and rinse hair thoroughly.
20. Bathe and rinse entire body thoroughly.
21. Place bath mat on Tubby seat.
22. Pull bath mat under buttocks.
23. Place towel on wheelchair seat.
24. Assist with slide transfer onto wheelchair.
25. Dry body thoroughly.
26. Place dirty clothes in basket in bedroom closet.
27. Return deodorant to bedroom.
28. Continue with morning routine.

Tea preparation

1. Put 1-1/4 cup water in Pyrex measuring cup.
2. Place cup in microwave.
3. Set microwave for two minutes and fifteen seconds.
4. Press start button.
5. When done, add 1 tsp. instant tea, 1 and 1/2 tsp. sugar, and enough milk to lightly color in designated cup.

6. Refill measuring cup with water and place in microwave.

Lunch preparation

1. Prepare lunch as instructed.
2. Put one cup of milk in thermos.
3. Put thermos and lunch in backpack.

Bathing (see bathing checklist)

1. While lying in bed, put on clean underpants and socks.
2. When seated on bed, put on back brace.
3. Transfer to green wheelchair.
4. Move to toilet.
5. Make tea.
6. Clean circuit.
7. Lay out clothes.
8. Bring clean T-shirt and deodorant into bathroom.
9. Assemble towels.
10. Assist to shave.
11. Place plastic splash cloth in position.
12. Move wheelchair up to Tubby seat.
13. Remove brace and T-shirt.
14. Drape shower curtain about neck.
15. Shampoo and rinse hair thoroughly.
16. Blot face dry.
17. With washcloth, wash torso, arms, and hands.
18. Dry body.
19. Apply deodorant and put on T-shirt.
20. Place dirty clothes in basket in bedroom closet.
21. Return deodorant to bedroom.
22. Continue with morning routine.

Circuit cleaning

1. Remove circuit from ventilator.
2. Remove strips and place on bedside table.
3. Take circuit to kitchen.
4. Scrub and rinse sink with Comet.
5. Fill sink with very hot water.
6. Add dishwashing liquid.
7. Take circuit apart.
8. Count parts to make sure there are eleven.
9. Put parts in soapy water.
10. Let soak while reassembling alternate circuit.
11. Take dry part from other circuit to master bedroom.
12. Assemble and connect circuit.
13. Attach straps, making certain that when the mask is worn the tabs will lift outward from the face.

14. Wash mask to remove oils.
15. Run soapy water through all tubes.
16. Wash all parts thoroughly.
17. Rinse all parts in hot water to remove soap.
18. Take all hoses outside and whirl to remove excess water.
19. Count parts to make sure there are eleven.
20. Hang large hose in bathroom.
21. Shake short hose to remove internal droplets.
22. Set other parts on towel in bedroom to dry.
23. Take two small hoses and compressor to bathroom.
24. Blow out small hose until dry (1-1 1/2 minutes).
25. Return compressor and hoses to back bedroom.
26. Continue Morning Routine.

Sample Checklist Three

MORNING ROUTINE: BEDROOM

Dressing

1. Change underwear every morning, found in dresser drawer.
2. Attach new panty liner to underwear, found on shelf.
3. Transfer to commode, if necessary. One arm is placed under knees and one under arms for support. Slide body to edge of bed, then lift, using leg muscles instead of back muscles. Be careful with sore knees and stiff muscles. Lift footrests before transfer.
4. After toileting, wipe bottom thoroughly.
5. Transfer to bed using transfer procedure described above.
6. Wash face and hands with washcloths, and wash underarms and bottom with disposable washcloths during period.
7. Put on slacks, socks, and shoes.
8. Unplug battery charger of wheelchair.
9. Transfer to wheelchair.
10. Fasten seat belt on wheelchair.
11. Secure middle "hole" of wheelchair between knees.
12. Take off nightgown — take it off right arm before left.
13. Apply deodorant.
14. Put on shirt — right arm through first.
15. Clean glasses as needed and put on.
16. Put on jewelry and earrings as requested.

Breakfast and lunch preparation

1. Eating tray should be placed over lapboard and belted around wheelchair.
2. Prepare cereal as instructed — usually warm cereal in colder months.
3. Add three teaspoons of bran to cereal.
4. Place the green, non-stick mat on eating tray.

5. Tuck a napkin or paper towel under neckline.
6. Serve cereal.
7. While I eat, prepare and place a glass of juice with a straw on table for mid-morning.
8. Prepare sandwich for lunch as specified on refrigerator door.
9. Cut in half and wrap each half in wax paper.
10. Put sandwich in refrigerator.
11. Open canned beverage and place in holder in refrigerator for lunch.
12. Offer chocolate milk or other beverage with straw when cereal is finished.
13. Remove eating tray.
14. Wash dishes and counter.

Enema

Enemas work better after breakfast and are done every other day, opposite shower.

1. In bathroom, attach clamp to enema hose.
2. Fill with warm water and two squirts of Ivory soap.
3. Bring to bed with towel.
4. Place towel on bed
5. Remove wheelchair belt and "hole."
6. Transfer to bed onto towel.
7. Pull pan underwear to knees.
8. Lay on left side.
9. Insert enema solution by lifting container above head and unclamping hose.
10. After enema is given, transfer to commode.
11. Fasten belt to secure position and leave bathroom. Place towel in laundry.
12. When called, unfasten belt from commode.
13. Wipe bottom thoroughly with toilet paper.
14. Transfer to bed.
15. Pull up pants and underwear.
16. Transfer to wheelchair.
17. Secure strap and "hole."

Shampoo other day opposite enema

1. Remove hairclips and rubber band in bedroom.
2. Brush hair.
3. Remove folded blanket from bed and place it on bathroom counter.
4. Get out three towels and the shampoo.
5. Transfer onto counter, using one arm under knees and one under arms. Be sure to stand on my left to be able to transfer onto counter.
6. Place one towel under my neck as a cushion.
7. Drape one towel over me to protect from water spray.
8. Run water until it is warm too hot.
9. Grab blanket and slide me forward, supporting my head.
10. Rinse hair well using the blue cup near faucet.
11. Shampoo hair.
12. Rinse thoroughly.
13. Repeat shampoo, as needed.
14. Slide blanket back, supporting head.

15. Wrap towel around hair.
16. Transfer to wheelchair.
17. Comb out hair.
18. Blow dry with hair dryer found in third dresser drawer, moving dryer to new sections of hair frequently.
19. Use lower diver temperature when most of hair is dry.
20. Brush hair into bun, securing with rubber band.
21. Use other hair clips to secure bun. Comb sides and top of bun to smooth hair.
22. Put away all materials.

Shower

Showers are taken as requested

1. Position shower chair inside bathtub.
2. Transfer to bed.
3. Undress on bed, right arm through shirt before left.
4. Transfer to shower chair.
5. Wash all body parts and hair using specified materials.
6. Dry off as well as possible in shower chair.
7. Transfer to bed.
8. Dry off thoroughly and begin dressing routine, #7.

Brushing teeth

1. Assemble materials: red toothbrush, toothpaste, tissue, plastic cup with water from bathroom and white bowl from bed headboard.
2. Apply small amount of toothpaste to brush.
3. Brush teeth thoroughly.
4. Hold white bowl under my chin and rinse mouth with water from cup.
5. Wipe off any spills with tissue.
6. Return materials.

Wrap up

1. Before leaving, assist in toilet, as needed. (Dressing #3)
2. Be sure that drinks for the day are within reach.
3. Assemble materials for the day as need, i.e., coat, pants, etc.

AFTERNOON ROUTINE

1. Transfer to commode, as needed.
2. Remove hole of wheelchair and seatbelt before transferring.
3. Place one arm under my knees and one under arms to lift.
4. Transfer to bed.
5. Slide pants below hips.
6. Transfer to commode.
7. After toileting, wipe bottom thoroughly.
8. Transfer to bed to dress.

9. Transfer to wheelchair.
10. Secure "hole" and seatbelt.
11. Polish and care for nails once a week.
12. Help with phone calls and mail, as needed.

EVENING ROUTINE

1. Give medicine at 9 p.m.; 3 and 1/2 Desyrel, found on kitchen counter.
2. Place pills, one at a time, as far back on my tongue as possible.
3. Offer drinks in cup straw, as needed.
4. Apply nose spray application in each nostril.
5. Transfer to bathroom as needed (see Afternoon #1).
6. Remove shirt and bra, place in laundry, as needed.
7. Put on nightgown.
8. Pull sheets back on bed.
9. Transfer to bed.
10. Take off pants, shoes, and socks.
11. Place in laundry, as needed.
12. Place pillow under head and knees.
13. Cover with blankets.
14. Lay out clothes for tomorrow.
15. Leave a light on, if requested.

Sample Checklist Four

MORNING ROUTINE

1. Bring irrigation equipment from bathroom to kitchen.
2. Sterilize by setting equipment to boil in water with 1/2 cup of vinegar added.
3. Boil cup of water in microwave for tea or hot chocolate and bring to room.
4. Take off boots at place behind bathroom door.

Fleets: Every other day

1. Assemble materials: pad, suppositories, gloves, Vaseline, trash bag.
2. Place pad under me.
3. Turn me to the left side with my right knee bent.
4. Place a pillow at my back and between knees.
5. Lubricate glove with Vaseline.
6. Begin digitals (below) using five rotations, one rectal pull.
7. Insert suppository.
8. Do five leg pushes.
9. Begin physical therapy, with one minute of digitals after each limb, and right before dressing, to make sure bowel routine is over.
10. Log results and the number of suppositories used.

Digital stimulation

A gentle, rotary motion toward the backbone will stimulate the lower bowel to empty. If this is done too vigorously, the rectal lining will be damaged and bleeding will occur. Report any signs of bleeding to me, and write a note to p.m. personal assistant to use an Anusol suppository. Position me as for fleets.

1. Use Vaseline on gloved index finger.
2. Insert finger into rectum 1/2 inch, or no further than first joint.
3. Use a slow, gentle, rotary motion toward the backbone.
4. After every ten circulations, lightly pull the rectal muscle up. Repeat for one full minute.

Physical therapy three times on each limb

Feet

1. Straighten all toe joints.
2. Push foot to 90 degree angle and release.
3. Turn foot to the left, then to the right.

Leg

1. Lift both knees and rock side to side.
2. Hold palm of hand above knee and straighten leg.
3. Bend knee and bring to chest, then stretch back and forth to bed.
4. Knee to chest
5. Toe to head. Go as far as straightened knee will allow (seven times).
6. Row boat: Push leg sideways as far as it will go (seven times).

Hand

1. Straighten each digit.
2. Spread fingers apart
3. "Angel in the snow": bring arm to side and raise above head, bend at elbow to touch head, and support opposite shoulder.
4. Knead knuckles.
5. Push hand toward palm.
6. Bend hand at wrist up and down.
7. Place elbow at 90 degrees. Turn palm back and forth.

Arm

1. Elbow hinge; bending back and forth.
2. Straighten elbow (ten times).
3. Apply zinc.
4. Apply cornstarch.
5. Rub two minutes on each side.
6. Tie up garbage bag, place by front door:

Irrigation, other day or when needed

1. Turn off stove burner.
2. Empty water into sink.
3. Using prongs, lift irrigation equipment out and bring to bedroom.
4. Roll table with materials to bedside if not already there from fleets.
5. See that a plastic pad is under me.
6. Wash hands.
7. Use 250 cc of sterile water.
8. Unhook catheter hose.
9. Insert 50 cc twice: withdraw 50 cc; repeat this until all water is used up.
10. Sterilize tip of catheter with alcohol, replace hose.
11. Rinse and empty irrigation container.

Douche only

1. Mix two tablespoons of betadine and warm water.
2. Insert nozzle carefully into vagina, under catheter.
3. Fill bag with water and rinse.

Catheter care

1. Wash hands.
2. Put on gloves.
3. Use orange basin only.
4. Open the labia with one hand to clean thoroughly.
5. Rinse perineal area.
6. Wash entire area with baby bath.
7. Rinse
8. Apply baby oil.
9. Rinse.
10. Use cotton balls with betadine on labia.
11. Wipe down each side of labia, down the center, and the lips using six cottonballs each just one times.
12. Pat dry.

Note: Use orange basin for buttocks and catheter care; gold basin for legs, arms, back, and face.

Bed bath - lower

1. Assemble materials: large towel, hand towel, three washcloths, basins and baby oil.
2. Fill gold basin with hot water.
3. Add baby oil.
4. Remove left side of gown.
5. Place large towel under me. . ,
6. Shave if listed, usually every third day
7. Wash quickly and dry with towel.
8. Apply lotion.
9. Rub back buttocks and upper thighs for five full minutes with lotion.

10. Report any red marks and write a note for next aide.

Teeth

1. Add water to orange cup and add straw.
2. Brush with Pearl Drops.
3. Empty in basin.

Face

1. Clean nose with cotton swabs.
2. Wash face.
3. Apply Sea Breeze.
4. Apply lotion on face and neck.

Bed bath

1. Roll onto stomach.
2. Wash back and dry. .
3. Use lotion on back; rub for one full minute.
4. Wash front and dry.
5. Use lotion on front.
6. Wash hands.

Legbag

1. Unhook bedbag; connect legbag.
2. Empty legbag to clean later.
3. Roll up socks.
4. Tape legbag in two places 1/2 inches down the catheter, 4 and 1/2 inches down tape tubing, slanted.

Dressing

1. Put on underwear.
2. Roll binder up half
3. Slide under hips and pull through.
4. Dress with skirt or slacks and shoes.

Transfer from bed to wheelchair

1. Place wheelchair parallel to bed.
2. Put on brake.
3. Slide feet toward footrests.
4. Pull torso up and into chair.
5. Adjust legbag.
6. Slide in armrests
7. Remove brake.
8. Put on bra and top; adjust.
9. Empty legbag.
10. Put on arm splints and sticks.

Shampoo other day

1. Assemble materials in kitchen; three towels, one white hand towel, two large colored towels, pins, shampoo, pick, and trash bag.
2. Pin large colored towel around neck.
3. Fold hand towel, in thirds; pin lightly around neck.
4. Attach cape and cover with trash bag.
5. Apply warm water.
6. Lather, rinse, and repeat.
7. Towel dry; "pick" hair.
8. Use hair dryer, if needed.

Makeup

1. Assemble jewelry, makeup, and move to living room.
2. Brush hair.
3. Spray hair with hot water if not a shampoo day; "pick."
4. Put on watch.
5. Use alcohol on pierced ears.'
6. Put on selected earrings and necklace.
7. Apply under eye con
8. Dust face with powder.
9. Apply blush all over.
10. Apply eye shadow, mascara, and eyebrow sealer.
11. Check legbag and empty, if necessary.

Lunch

1. Prepare lunch as specified.
2. Blend 3/4 cup Intensicleanse in 1/4 cup grapefruit juice.
3. Offer cup with straw.
4. Give pills: two diocto every other day, two docusate sodium with casanthrol, calcium, dyazide every other day, Vitamin C, dantrium, lioresal, potassium, ditropan, and two mandelamine.
5. After eating, empty legbag.
6. Lean me over for three minutes to shift weight.
7. Straighten in chair.
8. Prepare drinks for the day.
9. Do dishes.
10. Empty trash in bedroom and kitchen.
11. Clean nightbag ten minutes in soapy water, ten minutes in Clorox.
12. Fill ice trays; do other tasks as needed.
13. Fill out blue book with hours.

EVENING ROUTINE

Preparation

1. Turn back sheets on bed.
2. Get two towels from bed drawers and washcloth; put on bed.
3. Bring medicine case and jewelry case to living room and gown, green bottle, and tissue.

Medications

1. Prepare drinks: Prune juice, orange juice with intensicleanse.
2. Offer with straws.
3. Give medications.

Undressing

1. Remove jewelry, sticks, and splints.
2. Remove shirts, bra, and binder.
3. Remove belt.
4. Put on nightgown.
5. Reposition.
6. Brush hair into ponytail.
7. Bobby pin bangs away from face.

Physical therapy on hands three times each

1. Knead knuckles.
2. Handshake.
3. Place elbow at 90 degrees flexion and turn palm back and forth.
4. Bring arm above head— “angel in the snow.”
5. Put on brake.
6. Do sit
7. Take off brake.

Bedroom

1. Take clothes, binder, and bra to bathroom.
2. Wash out binder and bra; hang to dry.
3. Write in next day's routine; check for instructions.

Transfer from chair to bed

1. Unhook feet straps.
2. Remove chair arm.
3. Position and lock chair.
4. Stand with one leg between my knees and one leg on bed side of chair.
5. Lean me forward.
6. Lift my buttocks to the bed side, using your legs, not your back muscles.
7. Position me in bed.
8. Take wheelchair to living room.

9. Plug in alternate boost and recharge every other day.

Bedbag

1. Take off underwear and pants or skirt.
2. Wash hands.
3. Untape legbag; sterilize tip.
4. Change to bedbag, then empty.

Teeth

1. Run water in orange cup, offer with a straw.
2. Brush teeth with Pearl Drops.
3. Floss teeth; discard floss.

Washing

1. Run water in gold basin and orange basin.
2. Clean nose with cotton swabs.
3. Clean ears with cotton swabs.
4. Wash face using gold basin. ,
5. Apply Seabreeze.
6. Apply mentholatem on lips, and behind ears.
7. Wash face and buttocks with orange basin.
8. Rub face and buttock five full minutes.
9. Rub any red marks an additional five minutes.
10. Put a towel under my hips.
11. Put on gloves.
12. Wash perineal area with water from orange basin.
13. Rinse and apply oil.
14. Rinse well.
15. Open labia with one hand.
16. Wipe labia with betadine cotton balls: down each side, center, and lips using six cotton balls.
17. Pat dry.
18. Remove towels and clean up.

Physical therapy; three times each

Feet

1. Straighten all toe joints.
2. Push foot to 90 degree angle and release.
3. Turn foot to the left, then to the right.

Leg

1. Lift both knees and rock side to side.
2. Hold palm of hand above knee and straighten leg.
3. Bend knee and bring to chest, then stretch back and forth to the bed.
4. Knee to chest.

5. Toe to head: go only as far as straightened knee will allow, seven times.
6. Row boat: push leg sideways as far as it will go, seven times.

Wrap-up

1. Pull me up and over in bed.
2. Reposition as needed.
3. Put on boots.
4. Position tube.
5. Get out clothes for next day.
6. Fill ice water.
7. Offer snack, if needed.
8. Cover with blankets.
9. Turn off lights and computer.
10. Do dishes.
11. Lock both doors.

Sample Checklist Five

MORNING ROUTINE

Preparation

1. Put coffee on.
2. Refill beverage cups.
3. Bring cup of coffee to bedroom.
4. Sit me up in bed.
5. Serve coffee.
6. Give first puff of respiratory medication.
7. Give Sudafed with water.
8. Give second puff of respiratory medication; wait five minutes.
9. Put paper pad on seat of wheelchair.
10. Place specified clothes for day on foot of bed.
11. Bring shower chair, urinal, and dry sling from bathroom.
12. After five minutes give more respiratory medication.

Shower preparation

1. Remove pillow from under legs.
2. Lower bed to level position.
3. Position urinal correctly.
4. Empty urine into toilet.
5. Rinse and clean container.
6. Remove pillows from under arms.
7. Fold sling as instructed.
8. Fold arms across chest.
9. Roll onto right side and slide sling under body.
10. Roll from side to side and adjust sling as instructed.

Transfer to shower chair

1. Sit me up in bed.
2. Roll Royer Lift to bed.
3. Hook chains to sling with hooks facing away from body.
4. Separate legs of lift.
5. Pump handle to lift.
6. Swing legs to straddle main post of lift.
7. Roll lift and position over shower chair.
8. Lower lift.
9. Hold kneecaps and push seat toward back of chair.
10. Strap into chair.
11. Position top sling bars between handlebars of shower chair.
12. Roll into bathroom.

Shower and toileting

1. Position shower chair over toilet.
2. Change bed sheets, if necessary.
3. If sheets are changed, wash bed pad with Lysol.
4. Assemble soap, shampoo, clean washcloths, towels, and mop in shower area.
5. After toileting; wipe bottom thoroughly.
6. Turn on water to desired temperature.
7. Take off shirt.
8. Roll into area.
9. Position under spray.
10. Wash entire body thoroughly; shampoo hair on Monday and Thursday.
11. Rinse hair and body thoroughly.
12. Turn off water; towel dry.
13. Place towel around shoulders.
14. Roll into bedroom.

Dressing

1. Remove towel from shoulders and place on bed.
2. Brush hair as instructed.
3. Put on T-shirt.
4. Position Hoyer Lift.
5. Hook chains to bottom and top of sling with hooks facing out.
6. Unfasten shower chair strap.
7. Lift and roll to bed.
8. Before lowering, dry bottom thoroughly with towel on bed.
9. Transfer to bed.
10. Return shower chair to bathroom.
11. Mop bathroom floor and bedroom floor where shower chair was.
12. Apply lotion to groin and back of legs.
13. Put shorts on, keeping them lower in back.
14. Put pants on only up to groin area.
15. Pull pant legs up to knees.

Leg braces

1. Put on socks.
2. Place leg braces on foot of bed.
3. Hold foot by ankle above mattress.
4. Place brace flat on bed, under calves.
5. Push brace against heel.
6. Lower foot into brace so toes are straight.
7. Fasten strap on leg brace.
8. Repeat with other foot.
9. Put shoes on.

Back brace

1. Elevate legs.
2. Ensure proper position of sling.
3. Sit up in bed.
4. Place bottom of back brace behind back.
5. Lift shorts at back; push brace toward feet.
6. Lower body into brace.
7. Lift hands above head.
8. Adjust T-shirt.
9. Put on top of brace.
10. Fasten straps on back brace.
11. Position sling properly under body.
12. Adjust shorts as instructed.
13. Pull pants over brace by rolling onto side.
14. Adjust pants as instructed.

Transfer to wheelchair

1. Disconnect battery charger from wheelchair.
2. Position wheelchair correctly.
3. Make sure wheelchair brakes are locked.
4. Roll Hoyer Lift to bedside.
5. Separate legs of Hoyer Lift.
6. Hook chains to bottom and top holes of sling with hooks facing out.
7. Pump handle to lift.
8. Swing body so that legs straddle main post of lift.
9. Roll lift and position body over wheelchair;
10. Lower body until buttocks touch chair.
11. Push kneecaps toward back of chair to position body.
12. Lower lift completely.
13. Unhook chains and remove lift.
14. Straighten pants as needed.
15. Tuck sling into elastic band.
16. Tuck sling into front of chair.
17. Put on shirt.

Wrap

1. Attach wheelchair tray as instructed.
2. Attach wheelchair headrest as instructed.
3. Put on glasses.
4. Give hair final brushing.
5. Turn off night light.
6. Turn off bed pad pump.

Clean up: Bathroom

1. Mop floor thoroughly.
2. Hang up towels and washcloths.
3. Put away all materials.

Eating

1. Prepare meal as instructed.
2. Prepare day's drinking water.
3. Set next meal's materials out as instructed.
4. Serve
5. Assist with feeding, if necessary.
6. Wash dishes and wipe off counters.

Clean up: General

Monday

1. Check food in refrigerator; throw out spoiled food.

Tuesday and Thursday

1. Sweep kitchen floor.

Wednesday

1. Mop kitchen floor (once every three weeks).

Friday

1. Clean oven (once every three months).

EVENING ROUTINE

1. Prepare night beverages and bring to bedroom.
2. Ensure that bed linens are clean.
3. Place chux on bed.
4. Remove shirt and place in laundry.
5. Transfer from chair to bed.
6. Remove sling.
7. Soak sling in Lysol solution in bathroom.
8. Bring sponge bath materials in, if necessary.

9. Give sponge bath as needed.
10. Roll bed up to specified position.
11. Do ROM exercises as instructed.
12. Position pillows as needed.
13. Cover up for night.
14. Remove soiled pad from wheelchair and dispose.
15. Put away materials.
16. Hang sling to dry.
17. Hook up battery charger.
18. Turn off lights.
19. Lock doors.