

PATHWAYS:



A

SELF AND FAMILY MANAGERS GUIDE TO PERSONNEL MANAGEMENT



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Upon request, this document is also available in large print, on diskette and Braille.

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PREFACE

The Self and Family Managed Care Program option presents a unique opportunity for Manitobans with disabilities to be in control of their own resources. Under the sponsorship of the Office of Home Care, Department of Health and in conjunction with the Advisory Committee, the program creates the opportunity for individuals to hire, supervise and direct their own attendant/homemaker.

The Independent Living Resource Centre (ILRC) has been contracted to provide support services to the Self and Family Managers in the program. Three written manuals and a video have been developed as part of this response.

The information provided in these manuals is, to the best of our knowledge, current as of January 2012. Please note, however, that it is the Self/ Family Manager's responsibility to stay informed of changes which occur in any applicable regulations, laws and so forth.

The first manual, "Pathways" is intended to give an overview of the concept of self-management, including staffing, supervisory skills and employer/legal obligations.

The "Self and Family Manager's Financial Planning Kit - For the Record" is designed to provide details around budgeting, wages, payroll, record keeping and other financial employer obligations.

INTRODUCTION

WHAT IS THE SELF-MANAGED CARE PROGRAM?

In 1991 the Manitoba Government, through its Home Care Program, had initiated a two-year pilot program which was to be based in the Winnipeg area. This program was in response to requests from members of the disabled community, and was designed to address the changing needs of disabled people as they took advantage of the broader opportunities available to them in the community. The purpose of the program was to test the feasibility of a new model of Self-Managed Care for non-medical personal support service.

Twenty-nine persons were selected to test out the effectiveness of this new service delivery alternative. Those selected were given the funds and full responsibility to demonstrate how they were able to meet their own personal care and homemaking needs, by hiring, directing and managing their own staff.

As a direct result of the success of this project the Manitoba Government, in 1995, approved the province wide expansion of the Self-Managed Care Program option. This program again makes funding available to adults with physical disabilities who wish to take full responsibility for arranging and managing his/her own system of personal assistance to meet his/her assessed needs, which would otherwise be served by the Home Care program.

The program was guided by the Self-Managed Care Advisory Committee with representatives from the Canadian Paraplegic Association (Manitoba) (CPA), Independent Living Resource Centre (ILRC), Manitoba League of Persons with Disabilities (MLPD), Ten Ten Sinclair Housing Inc., along with representatives from the Office of Home Care and other members throughout Manitoba.

WHAT IS FAMILY MANAGED CARE

Family Managed Care is defined family members accepting to undertake full responsibility for meeting the consumer's assessed care needs by coordinating, managing and directing those non-professional services assessed as needed to maintain an independent lifestyle. The person who accepts the family managed care option will be fully responsible for arranging and managing the consumers own system of personal assistants to meet the consumers needs which would be otherwise be met through the services provided directly by the Home Care Program.

THE MANUAL

This manual has been developed by the ILRC, in consultation with Manitoba Health, Home Care, and the Self-Managed Care Advisory Committee. It is intended for use by individuals with disabilities and their families who are interested in developing their skills to be Self/Family Managers of their own attendant/homemaker services. It is based on the premise that the person with the disability, or those acting on their behalf, has the potential to direct his/her own attendant/homemaker staff, and that this is a skill which can be learned. The importance of this self-management skill cannot be overstated. An attendant/homemaker can be your key to living a fuller, more productive life by helping you meet your daily living needs. Your choice of attendant/homemaker staff can greatly influence the success of your Self-Managed lifestyle.

INDEPENDENT LIVING AND SELF AND FAMILY MANAGEMENT

Self and Family Management are two options available in the Independent Living Model. They are an example of independent living in action. Independent living philosophy encompasses the right to make choices, to take risks, and to take responsibility for your actions.

You do not need to be physically independent to live independently. As American Independent Living researcher, Zola states,

"Independence is not the quality of tasks we can perform without assistance but the quality of life we can live with help." (Zola: 1982).

Independence does not decrease as you learn to rely on others who are under your direction to meet your needs. Getting the proper help can be a critical factor in living independently. Having control over various aspects of your lifestyle by managing your attendant/homemaker can be a rewarding experience.

At the same time, making the decision to take control of your own personal services can be intimidating. Assuming responsibility for meeting your needs something you may not have had the opportunity to do in the past, does not mean that you have to do it alone. From time-to-time you may need to ask for advice, information, and assistance.

Managing attendant/homemakers does not imply that everyone will have skills in all areas of managing. Competent managers recognize what they can do, and also what they should delegate to others. This allows you to concentrate on areas where you have the skills and, if you desire, to improve skills in other areas with assistance.

As you learn to manage your own care system it is important to remember that making errors is an effective way of learning, and that learning is not always a smooth process. There may be times when you get so frustrated with some aspect of your system that you will want to throw in the towel. There will also be times when you will wonder how you ever coped without Self or Family Management.

THE ILRC SUPPORT ROLES

The Winnipeg Regional Health Authority has contracted the ILRC to:

- 1) Provide support/information to consumers/families who are interested in pursuing the Self/Family Managed Care Option.
- 2) Respond to inquiries about the program, and offer information, manuals, accounting/payroll kits, and "Self/Family Manager" training.
- 3) Facilitate learning through individual consultations, workshops and videos.
- 4) Facilitate opportunities for "networking", so that Self/Family Managed Care Program participants may share their experiences and solutions, to meet the challenges that come with change.

The nature of the ILRC's support to each individual will depend upon the needs expressed by the program's participants. We will endeavor to ensure that this support will develop accordingly.

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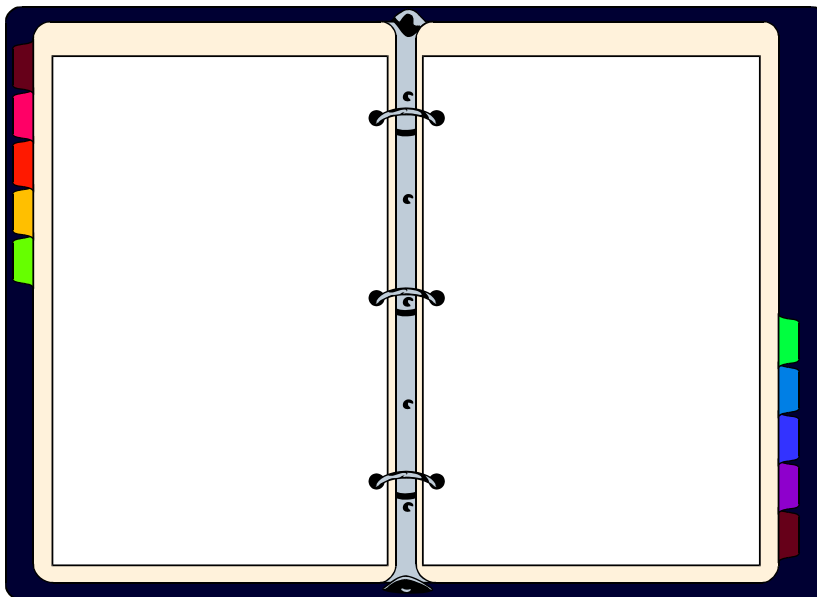
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CHAPTER 1

PLANNING FOR INDEPENDENCE



Chapter 1 describes a method of planning that is made up of three components, the first two of which are Assessing Your Own Care Needs and Your Own Preferred Hours of Care. From these a job description can be developed describing the activities of your employees' job. The third component, Lifestyle and Attitudes Self-Assessment, helps you in defining your personality, preferences, and habits. These are important considerations in the recruitment of compatible staff. The example guidelines allow you to pick and choose the assessments you find appropriate for your personal planning.

ASSESSING YOUR OWN CARE NEEDS

It is recommended that you conduct a self-assessment of your own needs, even though Home Care also assesses your care needs. This will assist you to communicate your needs to your attendant/homemaker(s). Another possible use of your own assessment would be as a basis for discussion with your Case Coordinator.

To assist you with completing your care needs, a self-assessment guide is provided. The guide provides you with an exercise, which specifies all anticipated aspects of personal care. Utilize any of the areas that you feel applies to your individual situation. Filling an assessment form out will require a commitment to explore your daily routines. You may need to time your routines and you may require assistance. The guide ends with a one-page summary that will give you an idea of your overall time needs.

You can use your completed guide in other sections of this manual in such areas as; writing a job description, a job advertisement, interview questions, or in evaluating staff.

USING THE GUIDE

Under the Self and Family Managed Care system, you will be able to schedule your care so that it meets your needs, in a way that is compatible with your current lifestyle.

To look at the interplay between time and tasks, go back to the beginning of the guide and insert **M** = morning, **A** = afternoon, **E** = evening for each area you have filled in. If you filled out the assessment guide on the basis of your present care schedule, do the same for this column. Once you have completed this, take a different color pen and make another entry of the time of day that would best suit you.

Once you have completed this, you will want to look at care areas which are not scheduled daily. You can use the form on the next page to slot in both your daily and non-daily needs. Use each block under a given day heading for a time frame that is convenient to your needs. Again, you could use a two-color pen system or simply use a pencil and erase as you rearrange items. While doing this weekly overall schedule, keep in mind not to rush yourself, compromise your lifestyle, or overburden your attendant in any one time-frame (e.g., spread out heavier chore type duties over the week or month).

GUIDE INSTRUCTIONS

It is recommended that you carefully read the entire guide before proceeding to fill it in. Most people find it easier to use present care schedules as their reference to fill out the guides. Later, we will look at how to go about rescheduling your care so that it meets your needs rather than just continuing to follow what has been set up for you.

For each area the following areas need to be filled out:

1. **NEEDS**

- Describe what you require.
- Use one-word cues (e.g., to do your fingernails - "cut", "manicure").

2. **HOW OFTEN**

- Specify the number of times per day, week, or month (e.g., 2/day, 1 week, 3/month).

3. **HOW LONG**

- Specify time frames in five-minute increments.
- Place the total time per day, week, or month in the appropriate **D** = Daily, **W** = Weekly, **M** = Monthly columns (e.g., for a transfer taking 10 minutes each time it is done and done 3 times per day you would put 30 in the D column).

4. **TIME OF DAY**

- Later, you will use this column to help you organize your schedule so that there is reasonable time for each of your needs to be met, without rushing you or compromising your lifestyle

MOBILITY SELF-ASSESSMENT CHART

ASSESSMENT AREA	NEEDS	HOW OFTEN	HOW LONG			TIME
			D	W	M	
MOBILITY/ TRANSFERS						
1. POSITIONING						
- chair						
- bed/turning						
- other						
TOTAL HOURS						
2. RANGE OF MOTION EXERCISES						
- upper body						
- lower body						
TOTAL HOURS						
3. TRANSFERS						
- bed						
- vehicle						
- hooyer lift						
- other						
TOTAL HOURS						
4. TRANSPORT						
- driving						
- pushing chair						
- other						
TOTAL HOURS						

ASSESSMENT AREA	DAILY	WEEKLY	MONTHLY
<u>MOBILITY</u>			
1. Positioning			
2. Range-of-Motion Exercises			
3. Transfers			
4. Driving			
TOTAL HOURS			

DAILY LIVING SELF-ASSESSMENT CHART

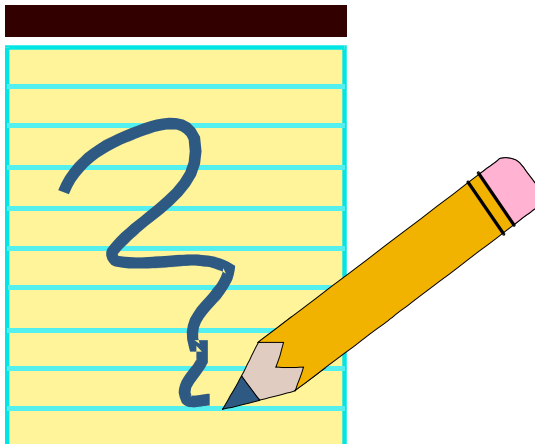
ASSESSMENT AREA	NEEDS	HOW OFTEN	HOW LONG			TIME
			D	W	M	
DAILY LIVING						
1. DRESSING/ UNDRESSING						
- assistance (partial/ complete/be specific)						
- assistive devices (braces/splints, etc.)						
TOTAL HOURS						
2. EATING						
- assistance (set up/ feeding/ be specific)						
- care of special devices						
TOTAL HOURS						
3. MEDICATION/ TREATMENTS						
- assistance (opening bottles/administration/ procedures/be specific)						
TOTAL HOURS						
4. BLADDER CARE						
- condom drainage						
- in-dwelling						
- ilio conduit						
- leg bag drainage						
- clean equipment						
TOTAL HOURS						
5. BOWEL CARE						
- digital stimulation						
- suppositories						
- enema						
- ostomy						
- clean equipment						
TOTAL HOURS						
6. TOILETING						
- bed pan						
- urinal						
- commode						
- toilet						
TOTAL HOURS						

<u>DAILY LIVING</u>	DAY	WEEK	MONTH
1. Dressing/Undressing			
2. Eating			
3. Medication/Treatments			
4. Bladder Care			
5. Bowel Care			
6. Toileting			
TOTAL HOURS			

PERSONAL HYGIENE

ASSESSMENT AREA	NEEDS	HOW OFTEN	HOW LONG			TIME
			D	W	M	
PERSONAL HYGIENE						
1. ORAL CARE						
- brush teeth						
- floss teeth						
- mouthwash						
- denture care						
- waterpik						
- other						
TOTAL HOURS						
2. GROOMING						
- wash hands/face						
- make-up						
- deodorant						
- shave						
- wash hair						
- set hair						
- cut/trim hair						
- ear care						
- nail care						
- peri-care						
- menstrual care						
- other						
TOTAL HOURS						
3. BATHING						
- sponge/bed bath						
- tub bath						
- shower						
- whirlpool						
- other						
TOTAL HOURS						
4. SKIN CARE						
- skin breakdown						
- prevention						
- identification						
- treatment						
- other						
TOTAL HOURS						

<u>PERSONAL HYGIENE</u>	DAY	WEEK	MONTH
1. Oral Care			
2. Grooming			
3. Bathing			
4. Skin Care			
TOTAL HOURS			



HOMEMAKING

ASSESSMENT AREA	NEEDS	HOW OFTEN	HOW LONG			TIME
			D	W	M	
HOMEMAKING						
1. MEAL PREPARATION						
- special diet						
- breakfast						
- lunch						
- dinner						
- snacks						
- clean up above						
TOTAL HOURS						
2. CHORES						
- make bed						
- sweep/vacuum						
- wash/dry dishes						
- dust/clean furniture						
- wash floors/walls						
- clean stove/fridge						
- scour tub/sinks/toilet						
- wash windows/mirrors						
- clean cupboards						
- clean closets/drawers						
Other						
TOTAL HOURS						
3. LAUNDRY						
- sort						
- hand washing						
- wash/drying						
- ironing/mending						
- other						
TOTAL HOURS						
4. SHOPPING						
- groceries (list)						
- personal (clothes, etc.)						
- errands						
- other						
TOTAL HOURS						

<u>HOMEMAKING</u>	DAY	WEEK	MONTH
1. Meal Preparation			
2. Chores			
3. Laundry			
4. Shopping			
TOTAL HOURS			

MISCELLANEOUS NEEDS

ASSESSMENT AREA	NEEDS	HOW OFTEN	HOW LONG			TIME
			D	W	M	
MISCELLANEOUS NEEDS						
1. COMMUNICATION						
- telephone						
- writing letters						
- other						
TOTAL HOURS						
2. FINANCES						
- paying bills						
- banking						
- budget preparation						
- other						
TOTAL HOURS						
3. ESCORTING						
- school/job						
- social activities						
- other activities						
TOTAL HOURS						
4. OTHER						
- pets						
- plants						
- yard work						
TOTAL HOURS						

<u>MISCELLANEOUS</u>	DAY	WEEK	MONTH
1. Communications			
2. Finances			
3. Escorting			
4. Other			
TOTAL HOURS			



SUMMARY SHEET

ASSESSMENT AREA	DAY	WEEK	TIME
<u>MOBILITY</u>			
1. Positioning			
2. Range-of-Motion Exercises			
3. Transfers			
4. Driving			
TOTAL HOURS			
<u>DAILY LIVING</u>			
1. Dressing/Undressing			
2. Eating			
3. Medication/Treatments			
4. Bladder Care			
5. Bowel Care			
6. Toileting			
TOTAL HOURS			
<u>PERSONAL HYGIENE</u>			
1. Oral Care			
2. Grooming			
3. Bathing			
4. Skin Care			
TOTAL HOURS			
<u>HOMEMAKING</u>			
1. Meal Preparation			
2. Chores			
3. Laundry			
4. Shopping			
TOTAL HOURS			

MONTHLY STAFF SCHEDULE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

TOTAL TIME CHART

Now that the guide has been completed and totals carried over to the Summary Chart, you will need to interpret the results. To do so, place the total hours from the five areas on the Summary Chart in the areas below:

	DAILY	WEEKLY	MONTHLY
Mobility	_____	_____	_____
Daily Living	_____	_____	_____
Personal Hygiene	_____	_____	_____
Homemaking	_____	_____	_____
Miscellaneous	_____	_____	_____
TOTALS	_____	_____	_____

We will now turn these numbers above, into hours by using the following:

1. Total daily minutes _____ divided by 60 min. = ____" ____hour(s).
2. Total weekly minutes _____ divided by 60 min. = ____" ____hour(s).
3. Total monthly minutes _____ divided by 60 min. = ____" ____hour(s).

Now round up minutes to the nearest quarter hour. (i.e., to .25, .50, .75) or nearest full hour.

To put the daily and monthly amounts in the weekly total format which you may be more used to:

1. ____" ____ hour(s) from #1 above multiply by 7 days = ____" ____hrs/wk
 2. ____" ____ hour(s) from #2 above as is = ____" ____hrs/wk
 3. ____" ____ hour(s) from #3 above divide by 4 weeks = ____" ____hrs/wk
- TOTAL** _____" ____hrs/wk

DEVELOPING JOB DESCRIPTIONS

The assessment guide can be used as a job description, but it is rather long and you may prefer to create a simplified one page overall description of the work and responsibilities involved. Whether you use the Care Needs Self-Assessment or a formal job description, there is a real need for an identified job description for the following reasons:

In developing a job description;

1. You form a realistic picture of your own abilities and requirements.
2. It gives prospective employees an overview of what is involved in the position.
3. It can be used to develop questions for interviewing.
4. It can be used as an evaluation tool in assessing job performance.
5. It can be used in situations where there is a disagreement between you and your attendant/homemaker(s) as to what their duties are. Disputes can result when an employer makes the job sound easier or less time consuming than it actually is. This can be due to:
 - a. A fear that the job will appear too strenuous.
 - b. A false sense of being more independent than they really are. (This is often recognized after hiring when the employer finds that they do not have the energy to carry out work they could have assigned to their attendant/homemaker.)

Job descriptions range from elaborate ones with every detail defined, to a simple one paragraph statement of the job. You will need to decide which best suits your needs. We have chosen to include the following example:

JOB DESCRIPTION - SAMPLE

TITLE: Independent Living Attendant

ACCOUNTABILITY: "Your Name"

JOB SUMMARY:

To assist a Self or Family Manager who has a physical disability with personal care and household management as directed.

QUALIFICATIONS

- Ability to maintain confidentiality with respect to employer's affairs (PHIA)
- Ability to take direction from employer and to accept responsibility in a flexible manner.
- Ability to maintain good communication and cooperation with employer and co-workers.
- Willing to perform personal and household tasks.
- Knowledge of and experience with personal care procedures and willingness to learn new procedures.
- Dependable, reliable and punctual.

RESPONSIBILITIES

1. Provide mobility assistance with positioning, exercising, transferring, and driving.
2. Provide daily living assistance with dressing, eating, special equipment, and toileting.
3. Provide personal hygiene assistance with oral care, grooming, bathing, and skin care.
4. Provide assistance with errands, communications, finances, and escorting as directed.
5. Provide homemaking assistance with meal preparation, laundry, shopping, and chores. Example chores are: dusting, vacuuming, washing floors, changing sheets, cleaning fridge, stove, bathroom, closets, drawers, and cupboards.
6. Provide assistance with maintaining inventory and ordering medical supplies.
7. Provide maintenance for personal and household equipment and appliances.
8. Other duties as assigned.

DETERMINING YOUR LIFESTYLE & COMPATIBILITY NEEDS

The third component of planning is designed to assist you with completing a personality and preference profile about yourself. These are important considerations, as you will want to hire an attendant/homemaker whose personality and habits are compatible with your own.

Although you may consider this section unimportant, not considering it could result in your hiring an attendant/homemaker who does little things that may annoy you. Clashes in these areas strain relationships and inhibit understanding. This will inevitably cause you stress in the place where you should be able to completely relax - your home.

To complete your personality and preference profile a Lifestyle and Compatibility Self-Assessment guide is included. The guide will provide you with an exercise, which specifies areas, related to either type of attendant/homemaker re: the "come-in" or "live-in". Utilize any one or more areas, which you feel applies to your individual situation.

As with the care needs assessment, you can use your completed lifestyle guide in other sections of this manual i.e. doing such things as writing a job description, a job advertisement, and interview questions selecting your most suitable staff or in evaluating staff.

LIFESTYLE & COMPATIBILITY SELF-ASSESSMENT GUIDE INSTRUCTIONS

It is recommended that you carefully read over the entire guide before proceeding to fill it in. There are two areas to the guide:

- A. compatibility attitude evaluation
- B. lifestyle evaluation

For the "compatibility attitude evaluation" you will mark a check under either "seldom" or "often". It is important to remember that this guide is for your information only: be as honest with yourself as possible, so that you will be fully aware of your attitudes and can hire someone who is compatible. For the "lifestyle evaluation" you will circle either YES or NO as your response, or fill in the blanks.

Compatibility Attitude Evaluation

	<u>SELDOM</u>	<u>OFTEN</u>		<u>SELDOM</u>	<u>OFTEN</u>
adaptable	_____	_____	noisy	_____	_____
afraid	_____	_____	outgoing	_____	_____
aggressive	_____	_____	patient	_____	_____
assertive	_____	_____	polite	_____	_____
calm	_____	_____	positive	_____	_____
extroverted	_____	_____	quiet	_____	_____
flexible	_____	_____	religious	_____	_____
forgetful	_____	_____	responsible	_____	_____
formal	_____	_____	rude	_____	_____
friendly	_____	_____	sad	_____	_____
honest	_____	_____	bad tempered	_____	_____
indifferent	_____	_____	smoker	_____	_____
like routine	_____	_____	sociable	_____	_____
like change	_____	_____	thoughtful	_____	_____
lonely	_____	_____	empathetic	_____	_____
mature	_____	_____	negative	_____	_____
moody	_____	_____			

Initials _____ **Date** _____

Lifestyle Evaluation

Daily Living Habits

I live an organized life	YES	NO
I prefer quiet	YES	NO
On weekdays I get up by	_____	
On weekdays I go to bed by	_____	
On weekends I get up by	_____	
On weekends I go to bed by	_____	

Personal Grooming

My appearance is important	YES	NO
I like a regular routine	YES	NO
My clothes are important	YES	NO
My attendants may use my personal items	YES	NO

Homemaking

I like my home neat and clean	YES	NO
I am particular about how things are done	YES	NO
I schedule housekeeping and laundry	YES	NO
I prefer to supervise housekeeping	YES	NO
Attendant must keep their room clean	YES	NO
Attendant can decorate their room	YES	NO

Food

Likes _____

Dislikes _____

I like regular meals	YES	NO
I eat with my attendant	YES	NO
I supervise meal preparation	YES	NO
Attendant can prepare different meals for themselves with my food	YES	NO
I would try attendant's food likes	YES	NO

Entertainment/Leisure

I like:

- TV	YES	NO
- Books	YES	NO
- Movies	YES	NO
- Sports events	YES	NO
- Cultural events	YES	NO
- Plays/theatre	YES	NO
- Concerts	YES	NO

OTHER _____

I visit friends frequently	YES	NO
I go to social activities frequently	YES	NO
I entertain frequently	YES	NO
Attendant can entertain	YES	NO
Friends stay overnight	YES	NO
Attendant's friends can stay overnight	YES	NO
My social life is planned	YES	NO
My social life is spontaneous	YES	NO
I participate in sports	YES	NO
I am religious	YES	NO
I listen to loud music	YES	NO

Music I listen _____

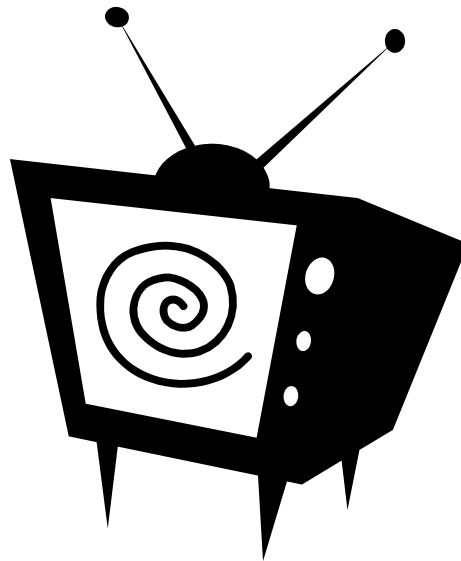
Types of TV programs I prefer _____

Hobbies _____

Other

I smoke	YES	NO
Attendant may smoke	YES	NO
I drink alcohol	YES	NO
Attendant may drink alcohol	YES	NO

Initials _____ **Date** _____



CHAPTER 2

RECRUITING POTENTIAL STAFF



This Chapter describes methods of attracting qualified applicants through creative advertising and the use of preliminary screening of candidates. Guidelines for resume reviewing telephone screening, and techniques for successful advertising are highlighted. Included are samples of advertisements and suggestions on where to recruit staff.

ADVERTISING

Creativity and imagination are the mainstays of advertising as you wish to attract attention but not discourage potential attendant/homemakers. While being creative, it is also necessary to remember the importance of realistic advertising. Realistic advertising provides the job applicant with relevant information without distortion.

THE WELL WRITTEN AD

1. Specific work time frames: (i.e., part-time, full-time, live-in, time of day, weekdays and/or weekends).
2. State your gender: Or if personal care is involved, that of the attendant you prefer. (The Human Rights Commission would be likely to uphold this as a bona fide qualification. You can apply to the Commission prior to advertising to receive an approval to advertise for an employee of a particular sex.)
3. Describe duties: (e.g. to assist with personal care, household management, cooking, etc.).
4. Wages and/or conditions: of employment (e.g. room, board, plus income of \$10.00/hr., weekends required, etc.).
5. Qualifications: To reduce the number of unqualified applicants you could also include:
 - level of education/training required
 - past work experience required
 - specialized skills
 - personality traits
6. How to Apply: Include phone/address/e-mail for reply.
 - to provide further information for applicants
 - to screen callers

A WORD OF CAUTION

1. Advertising that you are a person with a disability and disclosing your phone number or address carries an element of risk. You may increase your risk of receiving unwanted or disturbing phone calls or attracting unwanted visitors vandals, or burglars. Your own ability is another consideration, for example, if you are slow in answering the phone and/or have difficulty writing while on the phone.
2. You could advertise a phone number where messages could be left for you, such as that of a friend, or a relative if a prior agreement has been made.
3. You could advertise a box number and have the applications go to the newspaper if that is the advertising source you are using (if acceptable practice), or you could use a postal box.
4. An application address will take longer for you to receive replies than a phone number will.

WHERE TO ADVERTISE

- city newspapers
- area newspapers
- newsletters
- schools, colleges and universities (financial aid offices)
- community billboards
- employment agencies
- Canada Employment and Immigration
- social service agencies
- word-of-mouth (co-workers, friends, family, etc.)
- email
- HRDC databank
- ILRC

Advertisement formats vary according to where the ad is being placed. Remember, the size and length of an ad will determine the cost of placement.

ADVERTISING EXAMPLES

1. **Newspaper**
Young male with physical disability needs live-in and part-time assistance for personal care and household management. Must have valid driver's license and be capable of heavy lifting. Wage negotiable. Leave message at 555-1234.

NOTE:

- request cost information.
- specify under which category of the classified section (remember your target group and that they may not read DOMESTIC HELP ads).
- highest exposure day is usually Saturday or Sunday.
- a bold, darker type heading catches attention.
- check the "Work Wanted" section for potential attendants.

2. **Word-of-Mouth**

Let people know you have a job opening.

- Make some calls.
- Put up an ad in your apartment building.
- Get in touch with your church or synagogue and service clubs.

3. **Posted Ads** 3 x 5" Index Card Ad:

LOOKING FOR SOME EXTRA CASH?	
JOB OPENING	
PART-TIME	
PERSONAL CARE ATTENDANT	
Female student with a disability requires assistance with personal care, typing, and meal preparation.	
SATURDAY	8:00 a.m. - 1:00 p.m.
SUNDAY	2:00 p.m. - 10:00 p.m.
LEAVE MESSAGE AT 555-1234	

NOTE:

Try to post your notice centered and at eye level. It is important to follow the rules for posting so management won't remove them. Sometimes, notices are removed after a certain number of days and you have to renew them. If you are mailing bulletin board ads they should be accompanied with memo, such as the one below:

TO:	John Doe Student Aid Office Red River Community College
FROM:	Your Name
RE:	Job Announcement
DATE:	January 19, 2012

Please post the enclosed on your bulletin board and, if possible, distribute it to interested people. Your assistance is sincerely appreciated. THANK YOU.

8 1/2" X 11" AD:
HELP WANTED
PERSONAL CARE ASSISTANT
Young male who uses a wheelchair needs 4 hours of assistance daily with personal care, meal preparation, and housekeeping.
HOURS: 6:00 a.m. - 8:00 a.m.
8:00 p.m. - 10:00 p.m.
DAYS: Monday to Friday

8 1/2" X 11" Ad

PERSONAL CARE ATTENDANT

To assist a Self or Family Manager, who has a physical disability with personal care and household management as determined by the manager.

QUALIFICATIONS:

- ability to maintain confidentiality with respect to employer's affairs.
- ability to take direction from employer and to accept responsibility in a flexible manner.
- ability to maintain good communication and cooperation with employer and co-workers.
- willing to perform personal care and household tasks.
- knowledge of and experience with personal care procedures and willingness to learn new procedures, dependable, reliable, and punctual.

A full job description is available on request.

Wage dependent upon experience.

RESUME TO: Your Name

 Address

 City, Province

 Postal Code

PRELIMINARY SCREENING

For the purposes of this manual, preliminary contact and initial screening have been combined. This method is used to select the applicants you will personally interview. It can be done by telephone screening, reviewing resumes, in person (if resumes are dropped off), or a combination of these depending on how you have chosen to have your advertising answered. Use these methods to select only the most qualified applicants for interviewing. This will save both the applicants and yourself time in unnecessary personal interviews.

TELEPHONE SCREENING

When applicants call or when you call them, use the telephone to your advantage by screening out the ones who do not meet your criteria or whose answers to your questions are inappropriate.

The quickest way to determine unsuitable applicants is to immediately state the hours and days of work you are looking for, and the salary you plan to pay. The ones for whom either of these is not suitable will immediately disqualify themselves, and save you time in further explanation.

If the response to this point is positive, ask the applicant if they understand the nature of the work involved, and give a short description of your needs.

When the applicant understands and accepts the nature of the work, continue by asking short questions designed to do further screening in relation to your needs. You should use a written list so that you ask every applicant the same questions, and try not to forget any area you have identified as important. The lifestyle and attitude assessment is designed to be used to help you formulate the questions. The following are some sample questions:

- Have you had experience with this type of work?
- Ability to get to work in a reliable fashion? (What if there is a blizzard?)
- Is there any reason you couldn't do lifting? (Hopefully applicant will disclose back problems.)
- If you were hired for less than full-time employment, would you continue to look for another full-time position while working for me?
- Do you have any other responsibilities, which might interfere with your work? (e.g. child care problems)

If at this point the applicant is still in the running, ask for their address and telephone number if you do not have them. You can either tell the person you will be in touch with them or set up a

personal interview. One word of caution - if you set up interviews with the first applicants that you speak to, you may have to get in touch with them to cancel if you receive more and better qualified applicants. It has been our experience that you normally receive a fairly large number of applications.

QUESTIONS THAT DISCRIMINATE

Another reason for using a standard question list is to avoid any applicant claiming discrimination. Carefully worded questions can help you avoid problems.

As most people are aware, there are anti-discrimination laws. These vary from province to province. The following is a list of unacceptable question areas for Manitoba:

- 1) Ethnic Origin or Background
- 2) Color/Race
- 3) Nationality or National Origin
- 4) Religion
- 5) Age
- 6) Sex
- 7) Gender determined characteristics i.e. beards
- 8) Physical or Mental Disability
- 9) Political Belief
- 10) Family or Marital Status
- 11) Source of Income – including Bankruptcy and Credit Matters
- 12) Sexual Orientation
- 13) Child Care Accommodations

Reviewing Resumes

Carefully reviewing resumes can assist you in screening applicants. The following is a list of tips that can be kept in mind when reviewing resumes:

- How does it look? (neat, accurate, spelling, grammar)
- How specific is it? (reason for leaving previous job)
- Are all the bases covered? (work experience, education)
- What are the patterns? (frequent job change, reasons for leaving)

Red Flags - check for:

- gaps (any time period of over 1 month - CLARIFY)
- omissions (educational, former employers)
- inconsistency (dates - use months)
- fillers (long descriptions, long words)
- least flattering comments about the applicant are at the end.

If after carefully reviewing the resume, the applicant is still in the running, you can further eliminate applicants by telephoning them and using the questions you formulated for telephone screening.

Personal Contact

The same method used for telephone screening can be used in person for initial personal contact.

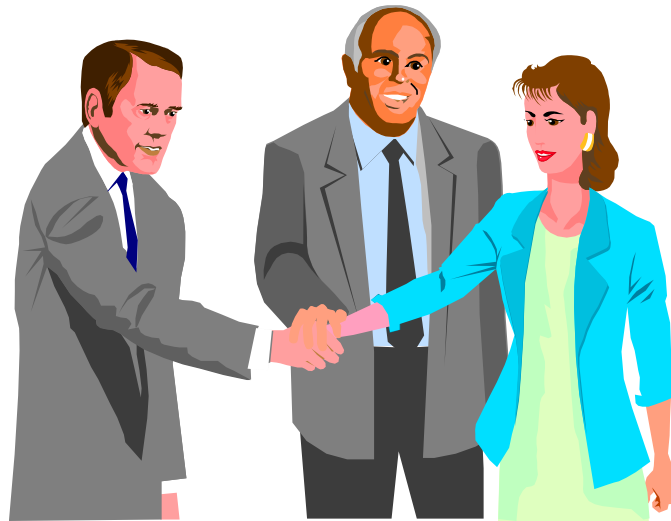
Initial screening will eliminate "chancy" applicants who appear to be inadequate or undependable, and could have the problem of short-lived employment with you, causing you further time-consuming hiring. Points to consider are:

- 1) Depending on your care needs, people who are inexperienced could find the work overwhelming.
- 2) People who have back problems could cause you inconvenience, and could cost you dollars in sick time or in increased Workers Compensation costs.
- 3) People who must travel long distances or who rely on others for transportation for short work periods, may have short-lived employment with you.



CHAPTER 3

SELECTING YOUR STAFF



This Chapter guides you through the process of staff selection. Starting with the application form it details methods of interviewing applicants, checking references, informing applicants, and developing a job agreement. Samples of job application forms, interview questions, an interview questions checklist, and employment agreements are given.

JOB APPLICATION FORMS

The job application form declares the individual a formal candidate for the job. People sometimes wonder about the need for an application form if they already have a resume.

The application summarizes the applicant's personal and work history, as well as their qualifications in a question format designed by you. This can point out discrepancies or omissions with regard to resumes. It is also the ideal place to request a release of information for reference checking and an omission clause (for explanation see end of application form). As well, it documents other availability for work, which could be useful to you or another Self-Manager in emergency back-up situations. The following is an example of a job application format:



JOB APPLICATION FORM - SAMPLE 1

Date of Application: _____ Date Available for Work _____

Position applied for _____

Name: _____

Phone: Home: _____ Cell: _____ Postal Code: _____

How do you wish to be addressed in correspondence?

 Mr. Mrs. Miss Ms. as aboveAre you legally eligible to work in Canada? Yes NoWould you prefer to work: Full-time Part-time Casual

What is your availability?

 Days Evenings Nights Sun. Mon. Tues. Wed. Thurs. Fri. Sat.Would you be willing to work extra shifts? Yes NoAre you able to assist with lifting, pushing, etc.? Yes NoIs there any reason known to you why you might be unable to perform consistently and promptly any of the job duties? Yes No

If Yes, please Elaborate _____

EDUCATION

Type of School	Name/Address	Years Completed	Grade, Diploma Degree and Year
<u>Secondary</u>	_____	_____	_____
<u>Business, Technical Trade</u>	_____	_____	_____
<u>College, University</u>	_____	_____	_____

EMPLOYMENT EXPERIENCE

Please list all employment starting with present/last employer first. If additional space is required, continue on a separate sheet of paper.

Employer:_____ Phone number_____

Address:_____ Supervisor's Name:_____

Job Title:_____ From:_____ To:_____

Starting Wage:_____ Present/Last Wage:_____

Reason for Leaving:_____

Duties/Primary Responsibilities:_____

Employer:_____ Phone No.:_____

Address:_____ Supervisor's Name:_____

Job Title:_____ From:_____ To:_____

Starting Wage:_____ Present/Last Wage:_____

Reason for Leaving:_____

Duties/Primary Responsibilities:_____

Employer_____ Phone No.:_____

Address:_____ Supervisor's Name:_____

Job Title:_____ From:_____ To:_____

Starting Wage:_____ Present/Last Wage:_____

Reason for Leaving:_____

Duties/Primary Responsibilities_____

CHAPTER 3
FOR EMPLOYMENT REFERENCES MAY I CONTACT:

SELECTING YOUR STAFF

Your present/last employer? ___ Yes ___ No
Your former employer(s) ___ Yes ___ No

Attach a separate sheet if references are different than previous.

Describe any skills, experience, training, or knowledge that relate to the position. If you wish, indicate your extra-curricular activities, including offices held memberships in clubs and organizations, leadership roles, sports activities, hobbies, etc. (You are not required to mention names that indicate race, religion, color, sex, age, marital status, physical disability, ethnic or national origin, political beliefs or family status and sexual orientation.)

Please comment on your idea of what an attendant's job is.

It is understood that the employer may at any time verify the information on this form and I hereby consent thereto.

I further agree that any omission or misrepresentation with respect to this information may be cause for denial of or immediate termination of employment.

DATE

SIGNATURE OF APPLICATION

JOB APPLICATION FORM - SAMPLE 2**GENERAL INFORMATION:**

- 1) Name: _____
 Telephone: Home: _____ Other: _____
 Address: _____ Postal Code: _____
 Social Insurance Number: _____
- 2) EDUCATION: (highest level achieved) _____

- 3) Do you have experience in attendant work? _____
 If so, please explain: _____

- 4) Do you have any experience with homemaking and meal preparation?

 If so, please explain: _____
- 5) Please identify hours you are available and willing to work: (check as many as are applicable)
- | | |
|----------------------|-------------------------|
| Full-time _____ | Part-time _____ |
| Casual/on call _____ | Overnight/Live-in _____ |
| Mornings _____ | Evenings _____ |
| Afternoons _____ | Nights _____ |
- 6) Date available for work? _____
- 7) Required number of hours per week? _____

- 8) What is your means of transportation? _____
- 9) Do you have a valid Manitoba driver's license? _____
- 10) Are you physically able to provide assistance with lifting, pushing, heavy work? _____
- 11) Wage expected? _____
- 12) Hobbies and Interests: _____

PREVIOUS EMPLOYMENT (start with present or last employment)

- 1) Employer _____
Address: _____
Position held: _____
Reason for Leaving: _____
Date started: _____
Date finished: _____
Reference: _____
- 2) Employer _____
Address: _____
Position held: _____
Reason for Leaving: _____
Date started: _____
Date finished: _____
Reference: _____

3) Employer _____

Address: _____

Position held: _____

Reason for Leaving: _____

Date started: _____

Date finished: _____

Reference: _____

IF YOU REQUIRE ADDITIONAL SPACE PLEASE USE BACK OF PAGE

Please list three character references.

1) Name: _____

Address: _____

Phone: _____

Relationship: _____

2) Name: _____

Address: _____

Phone: _____

Relationship: _____

3) Name: _____

Address: _____

Phone: _____

Relationship: _____

It is understood that the employer may at any time verify the information on this form and I hereby consent thereto.

I further agree that any omission or misrepresentation with respect to this information may be cause for denial of or immediate termination of employment.

DATE

SIGNATURE OF APPLICATION



INTERVIEWING CANDIDATES

The personal interview is designed to help you decide who will be the best attendant for you. Questioning is a very important part of this process but there are other things to keep in mind as well.

At first you may be nervous about interviewing. Remember that the applicant will probably not know anything about you, and that they are likely to be nervous as well.

It is a good idea to have a method of recording your impressions, as it will be difficult to remember what went on with whom when you are interviewing a number of applicants. To an extent your method may depend on your abilities. Note taking is the most often used, but if this does not work for you, you may wish to tape record the interview or ask someone to assist you. Whichever you do, it is an accepted practice to inform the applicant of what you are doing and why. Our experience is that most people are agreeable to some form of impression recording.

Just as you will form a first impression of the applicant, they will form a first impression of you. You should start at the interview to create the impression of yourself that you want. This means to establish yourself in the employer role (in control of your life and your home), particularly if you have asked an able-bodied person to assist you at your interviews.

The place you pick for your interview, and your mode of dress will have an effect on the interview process. Your bedroom, unless absolutely unavoidable, puts you in a dependent position. Your living room or den/office is more formal than your kitchen. As you can see your choice of room will also affect a first impression, and you need to decide whether you wish to be formal or informal. No matter which room you choose, sit facing the applicant so that you can observe eye contact and body language. Again, dress influences formality and is a personal choice, but an overriding aspect is what you are comfortable wearing. A suit may just not be your style.

If you are interviewing with able-bodied assistance, note whether the applicant looks to the able-bodied person for instructions and verification. This could indicate a reluctance to see you as an employer. Finally, whether interviewing alone or assisted, be suspicious of any applicant who takes control of the interview, as this may be the way they would work with you.

WHAT TO WATCH FOR**PITFALLS:**

- settling for the mediocre.
- talking instead of listening - interviewer should do 80% listening.
- not probing for explanations - e.g., tell me more, why do you say that?
- overselling the job.
- distractions - radio, T.V., spouse/children, pets.

OBSERVE DURING INTERVIEW:

- staring.
- expressing sympathy vs. empathy
- being overly considerate or hypersensitive.

RED FLAGS:

- person is rude.
- person is late.
- person has no references.
- person has no questions.
- person shows disloyalty or discloses confidentiality.

A good way to begin the interview is to ask the person to fill out an application form and give them a copy of the job description to read. This will give you time to review the resume again, or to initially review it if they have just brought it to you.

When you are both ready to begin you can start with a description of your disability, when and how it began, physical effects, and problems which can arise from time to time. (e.g., skin breakdown). It is wise, as well, to go over the hours of work and the wage, even if you have already done so in the screening process. This will set the tone for the interview, and give the person a chance to relax.

INTERVIEW QUESTIONS

The next usual step is to review the application and resume with the applicant so that you can clarify any areas of concern. Once areas of concern have been clarified you can continue on to the questions you have formulated. It is recommended two types of questions are used: **1) background questions and 2) situational questions.**

Background question answers show how the person will fit with your needs. Situational question answers show how the person will react to different problems and/or daily routines. Both types of questions should be designed around your own personal needs.

There is one type of question format which assigns points to the answers to your questions. Points are then totaled at the end. Another format is to list two or three answers you would find acceptable, or a general statement about what you are looking for in an answer, and then simply have a space for checking either good or poor with regard to the answer you received. The following are some questions that could be used:

BACKGROUND QUESTIONS:

NAME: _____

1. Tell me about yourself and your experience (particularly with disabilities).

LOOKING FOR: EXPERIENCE, TRAINING, AND SUITABILITY)

answer: good _____ poor _____

COMMENTS: _____

2. Why are you interested in this type of work? (**LOOKING FOR: SUITABILITY)**

answer: good _____ poor _____

COMMENTS: _____

3. What does independent living mean to you? (**LOOKING FOR: CHOICE, RESPONSIBILITY, RISK TAKING, ETC.)**

answer: good _____ poor _____

COMMENTS: _____

- 4) What safety factors would you consider when transferring me? (**LOOKING FOR: BODY MECHANICS, POSITIONING, BRAKES, ETC.)**

answer: good _____ poor _____

COMMENTS: _____

- 5) What qualities do you feel you could offer in working for me? In what areas do you feel you might require learning? (**LOOKING FOR: A REALISTIC VIEW OF THEIR OWN ABILITIES)**

answer: good _____ poor _____

COMMENTS: _____

- 6) How do you react when instructions are given? (**LOOKING FOR: WILLINGNESS TO TAKE DIRECTION)**

answer: good _____ poor _____

COMMENTS: _____

SITUATIONAL QUESTIONS

1. While working for me, you comment to me that I feel warm when you touch me and that I seem to be perspiring. I agree and say I will call my doctor tomorrow. Who makes the decision to call the doctor? How would you respond?

(LOOKING FOR: IT IS THE EMPLOYER'S DECISION)

answer: good _____ poor _____

COMMENTS: _____

2. On a Sunday I get a flat tire on my wheelchair. Wheelchair Services does not work on Sunday. What would you suggest to overcome this problem?

(LOOKING FOR: CREATIVITY [E.G., TAKE TIRE TO SERVICE STATION] FINAL DECISION IS EMPLOYER'S.)

answer: good _____ poor _____

COMMENTS: _____

3. Normally my laundry and housekeeping are done on Wednesday. On Monday I had agreed that you could leave early on Tuesday. On Tuesday I inform you my laundry and housekeeping will have to be done today, as there is no time tomorrow. You realize that you will not be able to leave early. How do you respond? **(LOOKING FOR: REMIND EMPLOYER OF PROMISE, COMPROMISE AND DO AS MUCH AS POSSIBLE ON TUESDAY)**

Answer: good _____ poor _____

COMMENTS: _____

It cannot be over emphasized that it is important for you to formulate your own questions related to your own needs.

After formal questioning, it is a good practice to ask the applicant whether they have any questions. A lot can be learned about their grasp of your needs by their questions. Along with your list of questions, it is wise to have an interview checklist to ensure that you don't miss any area you wish to cover.



SAMPLE INTERVIEW CHECKLIST

- | | | |
|----|--|-------|
| 1) | Application filled out. | _____ |
| 2) | Provide information re: | |
| | employment agreement/contract | _____ |
| | job description | _____ |
| | disability | _____ |
| | hours of work | _____ |
| | wage and fringe benefits | _____ |
| | frequency of payment | _____ |
| | deductions | _____ |
| | termination notice | _____ |
| | use of personal property | _____ |
| 3) | Review information on application and resume | _____ |
| 4) | Interview questions. | _____ |
| 5) | Importance of attendance and punctuality | _____ |

CHECKING REFERENCES

After the interview is completed you will want to check references. This is an important part of the process as it is your only opportunity to check what the applicants have communicated to you. You can either telephone or e-mail for a reference. Most people find it quicker to phone.

In either case, you should have a prepared list of question areas to check on. If an applicant has asked you not to contact their employer, respect this, as the present employer may not know about this interview.

SAMPLE REFERENCE CHECK LIST

1. Did _____ work for you from _____ to _____
COMMENTS: _____
2. What was their job title?
COMMENTS: _____
3. What were the duties of their job?
COMMENTS: _____
4. How would you rate their job performance?
COMMENTS: _____
5. Would you rehire?
COMMENTS: _____
6. What was the reason they left?
COMMENTS: _____
7. Were they punctual?
COMMENTS: _____
8. Was there any problem with attendance?
COMMENTS: _____
9. How did they relate to co-workers and supervisors?
COMMENTS: _____
10. How did they handle constructive feedback?
COMMENTS: _____
11. Were they good at following directions?
COMMENTS: _____
12. Did they learn easily?
COMMENTS: _____

CRIMINAL RECORD/CREDIT RECORD/WORKERS COMPENSATION RECORD

So you want to hire an attendant. You are feeling that you really need to check out the person's background. You will be asking the person for three character references as well as three work references.

The purpose of the criminal record check would be to identify those whose criminal activity may render them unsuitable for employment. *****As the denial of employment because of a criminal record may be a contravention of the Human Rights Code, you should contact the Human Rights Commission on your specific situation to get advice on how to proceed with the criminal check and what to do with the information you receive from such a criminal record search.

You can legally require a Criminal Record Check (CRC) and a Child Abuse Registry Check (CARC) be made available to you as the employer, as part of the application process. Listed below are the two separate contacts for your employee/applicant to obtain and copy of the required documents:

Criminal Record Check – Public Safety building
4th Floor – 151 Princess Street, Winnipeg
Cost: - \$32.50

Child Abuse Registry Check – Government of Manitoba
Child and Family Services
102-114 Garry Street, Winnipeg
Cost - \$10.00

**THE PHONE NUMBER FOR THE HUMAN RIGHTS COMMISSION IS: 945-3007.
TTD/HEARING/SPEECH IMPAIRED 945-3442.**

INFORMING APPLICANTS

Once you have selected the applicant of your choice, contact them to ensure that they are still interested in the position. If they are, then let the other applicants know the position has been filled. If for any reason the applicant of choice does not work out after starting with you, you may wish to contact other applicants again without re-advertising. It is best to have left your relationship with them on a good footing, by having informed them of the filling of the position.

Informing applicants can be done by letter or by telephone. The following is an example of how this can be dealt with.

"Hello _____, this is _____." In reviewing the applicants, I have decided to hire another individual whose qualifications were best suited to my needs.

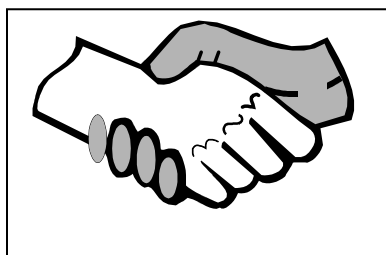
If you wish, I can pass your name on to other employers who are looking for an attendant with your qualifications.

I enjoyed meeting you and would like to thank you for coming to the interview. I'm confident that you'll find a position suited to your training, background, and interests.

EMPLOYMENT AGREEMENT

An employment agreement can be used as the method of hiring once you have selected an applicant and confirmed their willingness to accept the position, or it can be done at the time of orientation.

An employment agreement signed by both parties, employer and employee, can settle disagreements later about hourly wage, holidays, sick time and other issues. Some issues to consider including are: starting date, hours of work, duties, wage rate, payment schedule, benefits, termination, behavior, expenses, punctuality and attendance. Remember to revise the agreement if you change the conditions of employment, and that an agreement can be as simple or as comprehensive as your situation requires.



EMPLOYMENT AGREEMENT SAMPLESEmployment Agreement - Sample 1

I am offering you, _____, a position as my attendant, effective _____ . The hourly wage rate, for hours worked, will be _____ .

There will be a probationary period of four months, (subject to a two month extension as necessary), which will expire _____. A performance evaluation will be given at that time.

Duties will be as on the enclosed job description.

Your weekly shift pattern and hours of work will be: _____

Inability to work your shift must be reported to me as soon as possible so that I can arrange for emergency help.

Your wages will be paid on a biweekly basis.

The following compulsory employee deductions will be made from your gross earnings:

- Canada Pension Plan premium
- Employment Insurance premium
- Income Tax

You will be entitled to the following general holidays:

- | | | |
|------------------|------------------|--------------------|
| - New Year's Day | - Good Friday | - Victoria Day |
| - Canada Day | - Labour Day | - Thanksgiving Day |
| - Christmas Day | - Louis Riel Day | |

After one year's employment you will be entitled to two weeks holidays. All holidays will be arranged by mutual agreement.

Employer _____ Date _____

Employee _____ Date _____

**LETTER OF AGREEMENT BETWEEN
DISABLED EMPLOYER AND FULL-TIME PERSONAL CARE ATTENDANT**

Dear _____

This confirms our employment agreement discussed on _____. Your appointment as a personal care attendant will become effective on _____.

Duties will include personal care and housekeeping tasks as stated in the attached job description, except night care.

Hours of work will be from 8:00 a.m. - 4:30 p.m. with a half hour lunch break, Monday to Friday.

Your gross wage will be \$_____ per hour worked payable on the last working day of each two-week period. The following deductions will be made from your gross earnings:

Canadian Pension Plan premium
Employment Insurance premium
Income Tax

Vacation pay of 4% of gross earnings will be added to each bi-weekly wage payment. You agreed to give me at least one-month notice when you wish to take your vacation.

You will be entitled to the following paid statutory holidays: New Year's Day, Good Friday, Victoria Day, Canada Day, Labor Day, Thanksgiving Day, Louis Riel Day, Christmas Day

Any holiday falling on a weekend will be compensated for by one day off before or after the weekend or at some other day, by mutual agreement.

In case of sudden illness or other unforeseen event you will make every effort to notify me as soon as possible so that I can arrange for emergency help.

If you agree with the terms of this agreement, please sign both copies and return one.

Yours sincerely,

I agree with the above.

_____ Date:_____

CHAPTER 4

PROVIDING ORIENTATION AND TRAINING



This Chapter provides ideas on training and orienting staff in the areas of safety and cleanliness, scheduling and recording of hours, security and confidentiality, and employee networking and training resources. Included is a sample-training checklist.

ORIENTATION AND TRAINING

Orientation includes the activities through which new employees are made familiar with their jobs, co-workers, policies and rules of their employer. The underlying issue is socialization - the process of systematically clarifying the expectations, behavior, and attitudes of a new employee in a manner considered desirable by the employer. Done well, orientation enhances people's understanding of the employment and household situation, and adds consistency to their behavior. Higher performance and satisfaction, and increased commitment are anticipated. This results in reduced adjustment times, anxiety, and staff turnover.

Your attendant/homemaker(s)' training will depend on your needs. You can begin with explanations and rationales of what you wish them to learn. A good place to start is with your disability. Explain any technical words you use, at their level of understanding. Explain your disability, in as much detail as possible, depending on your comfort level. Be sure to emphasize safety precautions and equipment operation. Explain results of not following your time schedules or directions (e.g., causes you pain when transferring).

When training, you first present an overview of what you wish to teach, then present the material in detail. Finish with a summary of the material you presented. If you do the training in more than one session, briefly review at the second session what you taught in the first session.

Make it clear from the beginning, by both your directions and your actions, that you are the employer and that you are responsible for making decisions. If they seem annoyed, don't feel afraid or guilty. Discuss their annoyance and remember you are the employer. By being clear about this you will gain the respect of your staff. As well, be knowledgeable about your disability, your care and homemaking needs. If you do not have a caring attitude toward yourself, don't expect someone else to have one. And finally, demonstrating to your attendant/homemaker that they are valued will gain you their respect as an employer.

EXPLAINING AND REVIEWING

You can start by providing an overview (e.g. your morning routine) and then walking through it step by step. Provide an explanation of why you do something a particular way. This will increase the attendant/homemaker's understanding of its importance to you. In fact, training is most effective when you combine explanation, demonstration and hands-on practice. After you have gone through a routine in detail, summarize it. If you have more than one training session, review the first part at the second session.

TALKING ABOUT SAFETY

Remember to talk about safety precautions and explain the use of equipment. Inform the attendant/homemaker of the consequences of not following your direction (e.g. you have pain while transferring, you are put at risk). Remember also that, as the employer, you are responsible for the health and safety training of your workers under the Health and Safety Act. For example, if you expect your attendant/homemaker, while cleaning the kitchen, to use oven cleaner (a hazardous substance), you must direct him/her to read the instructions on the label and to wear the rubber gloves which you provide.

SAFE LIFTS AND TRANSFERS

This is a very important area in your training, for both your welfare and your attendant/homemaker. Back injuries are a real concern for attendants/homemakers and you will both suffer if your attendant/homemaker needs to take time off.

CLEANLINESS AND UNIVERSAL PRECAUTIONS

Tell your attendant/homemaker the importance of general cleanliness, such as before handling food. Also for health and safety, universal precautions should be understood and followed. The attendant/homemaker should routinely wear rubber gloves, where appropriate, to prevent skin and mucous membrane contact with blood and other body fluids.

EMPLOYEE NETWORKING

Introduce a new attendant/homemaker to your other staff as part of his/her orientation. By creating a team approach, you can assign responsibility to attendants/homemakers to advise you of a potential replacement attendant/homemaker if they must take time off. Such a network also allows your employees the sharing of experiences with co-workers in what can be a demanding job.

USING TRAINING RESOURCES IN THE COMMUNITY

If you feel you require outside assistance to train a new attendant in certain procedures, there are services in your community you can use. An allowance for training costs may be provided by Home Care for training which you cannot provide. You will need to provide a training plan to your Case Coordinator for approval prior to this allowance being paid.

SCHEDULING

Your attendant/homemakers' working times should be scheduled to give him/her as much regularity, and notice, as possible. If you always negotiate a two-week or monthly schedule a couple of weeks in advance, he/she will be able to plan his/her other activities accordingly and he/she will respect you for valuing his/her lifestyles and other commitments. Too many last-minute changes in your scheduling will have an impact on your attendant/homemakers' sense of privacy and will reduce his/her commitment to the job. If you are looking for a lot of flexibility from your attendant/homemaker as to his/her work times, this will have to be stressed at the very start of hiring.

RECORDING HOURS

You should go over with your new employee what you require him/her to do (if anything) in helping you keep track of the hours he/she has worked. An easy system to maintain is to make it the employee's responsibility to sign-in the time/date he/she starts, and to sign-out the time/date he/she finishes. This provides you with ready documentation at all times about who worked what hours, and spares you trying to remember two weeks later whether an employee worked an unscheduled shift.

SECURITY

In orienting your attendant, you must have him/her understand how important his/her job is to your well being and security. It is critical that he/she be both reliable and punctual if you are to feel secure. Making sure locks are fastened and stove burners are turned off and taking other precautions seriously are all essential when you cannot get out of bed yourself to correct an oversight. Your on-call, emergency back-up arrangements should be with well-trained attendant/homemakers and should be tested from time to time to make sure that the response is what you expect.

MAINTAINING CONFIDENTIALITY

Your attendant/homemakers must keep your personal and private affairs to themselves. This should be covered in your employment agreement. You, in turn, must keep most details about your employees' confidential. Stories about one attendant/homemaker to another will inevitably get back to the first attendant/homemaker or to other people in the community - it's a very small world and, in the end, gossip only seems to sour relationships. This could make it hard to hire other attendant/homemakers in the future. Remember that you are now an employer in your community and you will be judged on your management abilities.

ORIENTATION CHECK LIST

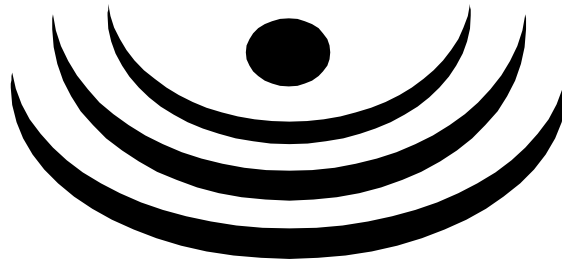
You can use an orientation checklist made up from the Assessing Your Own Care Needs Guide and job description, to ensure that nothing that you want to include in the orientation is missed. The following is an example of an orientation checklist:

- | | | |
|----|-----------------------------|-------|
| 1) | Tour of home | _____ |
| 2) | Show supplies and equipment | _____ |
| 3) | Mobility | |
| | - positioning and transfers | _____ |
| | - range-of-motion exercises | _____ |
| | - driving | _____ |
| 4) | Daily Living | |
| | - dressing/undressing | _____ |
| | - eating | _____ |
| | - medications/treatments | _____ |
| | - bladder/bowel care | _____ |
| | - toileting | _____ |
| 5) | Personal Hygiene | |
| | - oral care | _____ |
| | - grooming | _____ |
| | - bathing and skin care | _____ |

- 6) Homemaking
 - meal preparation _____
 - chores _____
 - laundry _____
 - shopping _____

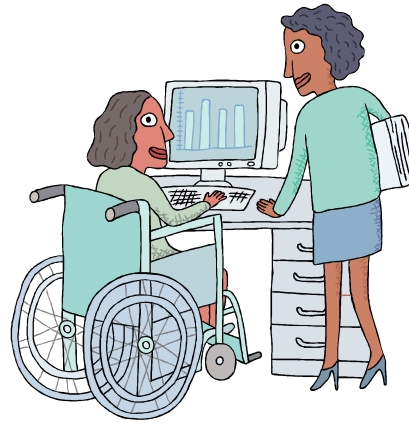
- 7) Miscellaneous
 - communications _____
 - finances _____
 - escorting _____
 - other _____

- 8) Responsibilities
 - when lateness anticipated _____
 - unable to show for work _____
 - notice re: vacation period _____
 - sharing household _____
 - other _____



CHAPTER 5

STAFF RELATIONSHIPS



This Chapter discusses the employee/employer relationship. Issues such as combining friendship and business and developing and maintaining balanced relationships are addressed. It assists in defining the boundaries between personal and work related activities. Also discussed are the components of good communication. Included in this are the areas of developing communication skills, active listening, assertiveness, providing feedback, maintaining lines of communication, and problem solving. A list of disability and attendant character types is listed, along with examples of the behavior and its causes

FRIENDSHIP AND BUSINESS

The relationship between any two persons is usually quite unique. There are obviously many different types of relationships that can be had between people. The relationship you may have with your employee, for example, may be quite different than the relationship you have with your close intimate friend.

The "friend" and "boss" relationships are only two examples of the types of relationships we will be involved with during the course of our day. There are so many different unique styles of relationships that two persons can be involved in. The attendant/homemaker relationship is one of these relationships that you will be involved with.

The attendant/homemaker is there to assist you with various activities of your daily living. Within the Self and Family Managed Care Program you, the employer, pay this attendant/homemaker. How would you define the relationship? Well, it would appear since you are the employer and the attendant is the employee then the relationship, on the surface, is to be simply one of BOSS and EMPLOYEE. In reality, the relationship between the attendant and Manager is usually, never quite that simple.

The attendant will be involved with many of the private and sensitive aspects of your life. The attendant, in some instances, is more familiar with the intimacies of your life, than some of your closest and more intimate friends. The simple boss and employee relationship may not adequately describe the relationship you have with your attendant. The relationship seems to have some parts within it that you would tend to find that in a friend and some parts you would tend to find in a boss and employee relationship. The other part to this relationship is that over time a friend relationship may very well begin to blossom, inside work and outside work. So, what name do you put on this relationship, friendship, employer/employee or something else?

It should be noted here that no matter what name you put on the relationship, the fact is that the relationship you will have with your attendant will be one that is unique for both of you. Putting a name to the relationship may assist you in figuring out some of the rights and responsibilities for yourself and for your personal attendant.

You, as the employer must be somewhat clear on what you want. The relationship could be all friendship. However, trying to treat a friend as an employee could become a bit of a problem. If the relationship is all work, then the personal intimacies that are continually being a part of the work relationship may not have a place to be comfortably expressed. Either extreme creates a whole set of problems.

A combination of both the friendship and boss/employee relationships will probably be the best arrangement. Ideally, the FRIENDSHIP and the BOSS/EMPLOYEE relationship can be combined and a balance found. If one decides to work toward this balance, how would one go about doing this?

BALANCING THE RELATIONSHIP

Establishing a balanced relationship is a process that takes time. This process does have a beginning. The beginning is when you decide to become a-Manager and decide to recruit a person to be an attendant. Your primary need is to hire someone that will adequately assist you with your personal care.

The initial relationship is closer to that of a business relationship. During this initial period, the Manager could explore with the new employee what the rights and responsibilities are for both the employee and the employer. Some examples of this would include the following:

- Should your employee knock on your door before entering or just walk in when he arrives for work?
- How much notice should an employee give you if they cannot show up for work?
- Does an employee have the right to refuse certain types of work?
- Does the Manager have the right to ask that the attendant/homemaker maintain confidentiality?

Both the employer and the employee will have their own expectations of the job. Expectations should be discussed as well in the initial stages. The employee, for example, may have the expectation that they first and foremost are there to be a "counselor" They may think that they should be attentive and "action ready" to assist in the resolving of any or all of your emotional upset.

Sound extreme? You bet! - Remember everybody has their own set of expectations that they bring to different situations. This is a productive practice to check out what the other person's expectations are in relation to the job.

From these discussions should come a written agreement and understanding. The more important expectations, rights and responsibilities agreed upon should be included. This agreement will go a long way to ensuring that both parties understand each other's expectations, rights and responsibilities. Involving the attendant in this process may assist in establishing the seriousness of your intent to have a relationship based on professional standards with mutual consideration for both parties involved. One addition to this agreement should be a written list of your care needs. Your attendant should review this with you to ensure that there is as little misunderstanding as possible.

MAINTAINING THE RELATIONSHIP

Managers and attendants should remember that the relationship they will have together is unique to each other and their particular set of circumstances. Therefore, there are no absolute set of rules, processes or procedures that will fit every situation.

Above and below are merely references and loose guidelines to help both the employer and the attendant/homemaker work out their own unique (and hopefully fruitful) relationship. There are a number of important elements that can assist in the maintenance of your relationship with your attendant.

1. **Compatibility:** When you hire the person try to ensure that there is some degree of "getting along together" between you and the person.
2. **Contract/Agreement/Understanding:** Establishing this with your attendant could avoid a great amount of friction and conflict.
3. **Duties:** Give the attendant a clear description of the duties that he/she is expected to perform.
4. **Honesty:** There needs to be an honest representation of each person's concerns, comments and issues.
5. **Communication:** Both parties need to be talking, with a degree of regularity, openly and honestly, to each other. Honest open communication will not absolutely prevent or solve all the problems, however, this will provide a good basis for the attendant and the employer to begin to resolve problems.
6. **Mistakes and Experience:** As a Manager be patient and gentle with yourself. Remember that it is only natural that you should make mistakes. Try to learn from them. "Learning from your mistakes" applies to the attendant, as well. This is a chance for you to assist them in doing the task a different way. Remember that it takes time to have the whole "operation" run smoothly.

PERSONAL FAVOURS VERSUS EMPLOYMENT DUTIES

One question always present within the relationship between the person with a disability and the attendant is whether or not certain tasks that are being done are indeed employment duties or personal favors. This needs to be discussed with your attendants. One general guideline is that, obviously, if the work is performed during the scheduled work hours then it is part of the person's duties. Therefore, it is not a personal favor. If the employer and attendant are involved in a relationship outside of work then such tasks as assisting with the emptying of a leg bag or assistance with feeding could be considered a personal favor. There are once again no absolute rules that cover every situation. As an employer you must work this out with your attendant in your own unique way. The guideline mentioned above does not always work. There may be times where you ask your attendant to do something over and above his work-related duties. An example of this would be the following:

- **The attendant and you are planning an evening out to visit with some friends. The evening arrives. For one reason or another, you are late in heading out to the party on that planned evening. So, you arrive later than expected. The attendant's shift ends at 10 p.m. and the party, really, just picked up speed at about 10:00 p.m. So, you ask the attendant to stay for an extra couple of hours. You tell him that if he would stay tonight then he can come in two hours later for his next shift. The attendant does not have to do this. The attendant may decide to do you a favour and stay an extra couple of hours.**

Another example of the favors that may be granted to each other within the relationship of Manager and attendant would be the following:

- **The attendant finds out that his father will be in town for a visit the very next day. He has not seen his dad for a number of years. He is scheduled to work for you the next day. The attendant calls you and asks if it would be possible for him to visit with his dad at your home during the "not so busy" time of his schedule. This is your home and you are the boss. You do not have to grant this favor. On the other hand, you may want to do your attendant a favor and allow his dad to spend time in your home visiting with your employee during work hours.**

As a Manager, you must remember that you are under no obligation to grant favors to your employee. You must also remember, that your employee does not have to do anything for you that is outside the realm of work duties. Usually, in the spirit of the work relationship, there is room for favors to be carried out from and to each other. The asking and the receiving of favors should never be taken for granted by all parties concerned. Favors are not a right or a responsibility. Favors are very similar to gifts, to be given or not given based upon the individual's free will.

KEEPING OPEN COMMUNICATIONS

Communication is an extremely important issue in the employee-employer relationship between the individual with a disability and their attendant/homemaker. You will need to maintain a good work environment to bring out the best in your relationship and your employee. Communication is the key attribute of a good manager in creating work environment interactions that are positive for both the employee and themselves.

In any person to person interaction there is a relationship; which is good, or bad, or neutral. You will form a relationship with your attendant. They will like you, or not like you, or they might have feelings somewhere in-between. Remember, your employee is paid to assist you in your daily activities, but in so doing they may share many private experiences with you which could cause confusion in the employer-employee relationship.

People exhibit numerous characteristics in interactions with others. There are many variables that affect the way you communicate at any given time, including the way you feel, impressions you hope to make, problems you are worried about, or even the weather. Masking feelings and remaining silent for fear of upsetting or hurting the other person's feelings will eventually lead to the breakdown of any relationship, due to the buildup of misunderstandings, hurt feelings, and petty irritations. This happens because both people remain unaware of their effect upon the other.

COMMUNICATION SKILLS

Good communication skills do not necessarily come naturally but they can be learned. Following are two short paragraphs of very important areas of this skill, followed by more in depth comments about communication.

BE CLEAR WITH INSTRUCTIONS. Prepare a work schedule if necessary. This can be especially useful if you have more than one person working in your home.

THE MANNER OF INSTRUCTING IS IMPORTANT. Explain when necessary why you want to have something done in a certain way. Asking is a better style than ordering, and a "thank you" for a job well done or a special service rendered will be appreciated.

ACTIVE LISTENING

Active listening enables you to understand your attendant's verbal and non-verbal messages. To do this, you need to interpret body language, maintain eye contact, and actively follow an attendant's conversation.

The saying "actions speak louder than words" is an indicator of how powerful body language is. You get your meaning across, without saying a word. Be aware that your attendant's body language can show a hidden, unspoken message. This may be something your attendant wants to say to you, but is not saying for one reason or another.

Eye contact does not mean staring but it does mean looking at your attendant off and on rather than at the floor. When people avoid looking at each other it gives subtle messages such as a lack of interest in what is being said or uncertainty.

Following is a form of active listening. Smiling, leaning forward, and nodding are all examples of non-verbal following. "Tell me more", "I understand", and "Yes, go on" are all forms of verbal following. Using these will let your attendant know that you are interested in what they are saying.

UNDERSTANDING MESSAGES

To truly understand what is being communicated you need to check out what you have heard or seen while practicing your active listening skills. The best means of checking out your understanding is to ask your attendant/homemaker. To ensure that your perceptions of non-verbal messages are correct describe what your attendant's non-verbal messages mean to you and ask if you are correct.

Paraphrasing is a means of describing what your attendant/homemaker's words mean to you by summarizing them and asking if you are correct.

SPEAKING UP

After listening to your staff actively, and checking out your perceptions for understanding, you need to communicate your needs, concerns, and thoughts. This would include describing your feelings and the attendant/homemaker's behavior, giving and receiving feedback, and giving directions.

The only way your attendant/homemaker will know what your needs and feelings are is if you tell them. They are not mind readers. By the same token, describe your staff's actions without generalizing about possible motives or their personality and definitely without accusing.

PROVIDING FEEDBACK

Feedback is a two-way street of giving and receiving. You must give your attendant/homemaker feedback to make them more aware of what they do and how they do it. You must also be prepared to receive feedback, as an attendant/homemaker's comments will let you know if you are being clear in your communication.

It is important to give constructive feedback even if you are upset. You are trying to give information so that a correction can be made; you are not criticizing. To give constructive feedback remember to:

1. Talk with your attendant when you are alone.
2. Talk as soon after the incident as possible.
3. Describe the behavior; do not generalize to the person.
4. Give an example, be specific.
5. Talk about the present incident, not the past ones.

Positive reinforcement is similar to constructive feedback, but is used as a form of reward. Tell your attendant when they have done something right or simply thank them. Everyone needs to know that they are appreciated.

As mentioned previously, you must be prepared to receive feedback. You can also promote feedback through paraphrasing and asking for examples. Feedback and the sharing of feelings from it will open new lines of communication.

GIVING DIRECTION

It is wise to keep in mind that some people learn by listening or being told, but others learn better and faster if they are shown how you want things done.

When giving directions make them simple and exact or step-by-step. Make sure you are consistent, that directions are carried out correctly the first time, and explain why it is important things are done in a specific way.

Last but not least, don't assume anything. Even a skilled attendant/homemaker will probably need to change some of their ways of doing things to the way that you have found works best for you.

PROBLEM SOLVING

Even if all of the outlined communication skills are used perfectly, conflicts will arise. As the employer it will be necessary for you to take the lead in resolving problems. In problem solving you should confront any situation head on; do not mask your feelings. Remember to describe the situation and your feelings, not the personality.

Problem solving is a process. The following are steps which, can be used in this process:

1. **Identify the Problem**
Everyone involved must realize that there is a problem. Someone may have to identify the problem as everyone may not realize it.
2. **Define the Problem**
Describe the problem without involving values, motives and personalities. Each person involved should describe what he or she sees as the problem. Often you will find there is more involved than you first realized.
3. **Generate Solutions**
Everyone involved should suggest solutions. Write down every solution, no matter how far-fetched it may seem without evaluating it or criticizing it at this point.
4. **Discussion and Evaluation**
Everyone involved should discuss the positives and negatives of each solution generated.
5. **Select a Solution**
Everyone involved agrees on the solution that will best solve the problem.
6. **Plan Actions**
Everyone involved works out who will do what, where, when, and how to solve the problem. Set a future date to get together to discuss whether the solution is working.
7. **Evaluation of Solution**
Everyone gets together on the date set and discusses whether the solution is working and the plan is revised as necessary.

By facing and confronting problems as above, working relationships can be strengthened and improved. Working relationships that use problem solving keep both the employer and employee working together and under less stress. Strong relationships will also keep employees willing to work for you.

VALUES, MOTIVES, AND PERSONALITY

Your working relationship will not only be affected by your communication but also by the mix of values, motives, and personalities of both you and your attendant. You will find yourself in numerous situations which could cause anxiety, tension, or conflict between you, because no two people have exactly the same personality, nor do you share exactly the same values and motives. Knowing your own values, motives, and personality will help you realize your abilities to get along with and communicate with a variety of people.

The following are character types presented by The Institute for Rehabilitation and Research of Houston, Texas in their manuals on Independent Living with Attendant Care. They illustrate specific character traits you might recognize in your attendants, your friends, your family, or even yourself. The manuals remind you that the traits are not exclusive to any one individual. Their illustrations present an analysis of a few types of behaviors along with the possible consequences of each behavior.

ATTENDANT CHARACTER TYPES

1. **The NURSE:**
These are people who have developed their own medical techniques and refuse to do a task any other way. They direct the person's care rather than the person assuming responsibility for his/her own care.
2. **The MOTHER:**
The attendant/homemaker feels their job is to take care of people and to nurture them. This is the type of person who hovers sweetly, pats people on the head or arm, and does things that are not needed.
3. **The BEST FRIEND/COMPANION:**
The attendant/homemaker allows no privacy for the person and refuses to allow him/her to have other social relationships. This attendant would probably expect to be included in all social activities planned by the individual and indeed, would be hurt if left out.
4. **The OVER PROTECTOR:**
This person's creed is "I know what's best for you". The attendant/homemaker might try to prevent the person from taking even minor risks, thus encouraging a dependent relationship.
5. **The GOOD SAMARITAN:**
The attendant/homemaker is a "do-gooder" whose primary objective is to make himself/herself feel needed. This person's creed might be "You've suffered enough already, let me take care of you". The GOOD SAMARITAN will do more for the person than is necessary and may treat him/her like a child.
6. **The DRUG ABUSER:**
This attendant/homemaker may do a good job when they are not "spaced out". They are usually unreliable and/or inconsistent in behavior.
7. **The PREACHER:**
These individuals insist upon imposing their religious beliefs upon the individual. Some attendant/homemakers have reportedly attempted to perform their duties through prayer. They do not respect another person's right to his own beliefs and values.

8. The ASSERTIVE PERSONALITY:

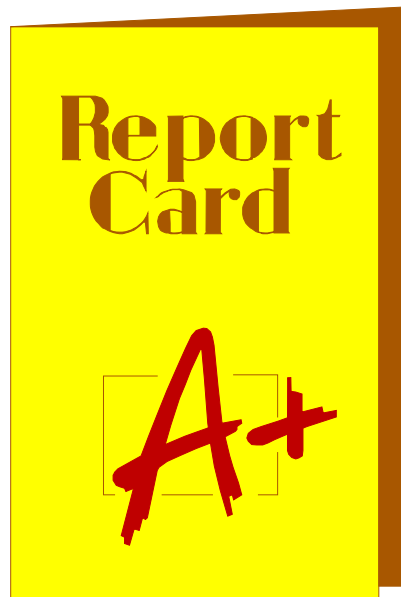
Like assertive people, these attendant/homemakers state their feelings and needs in a direct, yet non-threatening manner. They do not "put down" another person. They behave in a consistent manner and have a strong sense of self.

DISABILITY CHARACTER TYPES

1. **The AGGRESSOR:** These individuals are characterized by being overly demanding and bossy. They show no appreciation to the attendant.
2. **The MARTYR:** This individual's favorite phrase is "Don't worry about me", followed by a big sigh. This attitude encourages feelings of pity and even guilt from the attendant.
3. **The PACIFIST:** This is a passive personality whose main goal is to avoid conflict. This often results in unmet needs because of a fear that the attendant might be angry if asked to perform a task outside the normal routine.
4. **The GUILT-MAKER:** These people have difficulty accepting their disability and attempt to place the blame on others. Their non-verbal message is "Oh poor me" or "The world owes something to me". Because no one wants to accept the blame or the negative messages from the GUILT-MAKER, there is a tendency to avoid this type of person.
5. **The ROLLER COASTER:** These people experience extreme mood swings, which cause their behavior to be inconsistent. One minute this person is happy, the next, sad. Not knowing what to expect can hinder effective communication.
6. **The DRUG ABUSER:** The person might behave in an inconsistent manner and/or be unable to assume responsibility for his/her own care. This puts the burden of care on someone else and is not conducive to the idea of self-direction in independent living.
7. **The PREACHER:** The individual attempts to convert the attendant/ homemaker to accept his/her religious values, interspersing his/her conversation with quotes from the Bible or other religious doctrine. This person does not respect another person's rights to their own beliefs and values.
8. **The PERFECTIONIST:** These individuals are often described as "picky" by their attendant/homemakers. Generally, the person insists that tasks be performed in very specific, detailed ways with no flexibility. Setting realistic priorities might be difficult for this individual.
9. **The ASSERTIVE PERSONALITY:** Assertive people are able to express their needs in a direct yet non-threatening manner. They do not manipulate other people. They know themselves and usually have an air of self-assurance.

CHAPTER 6

STAFF EVALUATION AND REPLACEMENT



This Chapter describes job performance evaluations, addressing the issue of resolving related conflicts. It also discusses staff replacement, including termination and emergency back-up staff. An example of job performance evaluation is shown.

EVALUATING YOUR STAFF

As mentioned, at the end of the previous chapter, the satisfactory fulfillment of job responsibilities of the attendant/homemaker should be monitored daily, and anything which is done incorrectly or forgotten should be brought to the attendant/homemaker's attention.

This informal process should be carried over to a more formal documented evaluation on a regular basis.

Whether you have mentioned a specific probationary period or written it into an employment contract, it is a wise idea to do a formal WRITTEN EVALUATION of your employee within a certain time. The time would be dependent on how they work for you and how quickly you can get an accurate picture of their performance. Usually the evaluation takes place within TWO TO FOUR MONTHS and then at least once per year thereafter. Even if everything is going well, it will let the employee know that you are pleased with what they are doing in their job. Anything, which is done incorrectly or forgotten, should be brought to the attendant/homemaker's attention.

This informal process should be carried over to a more formal documented evaluation on a regular basis.

Documented evaluations can be done as simply as writing a letter to the employee discussing their work performance, or using a formal evaluation form. In either case the following points should be discussed.

1. Job Knowledge
2. Job Skills
3. Time Management
4. Ethics and Integrity
5. Communication
6. Initiative/Commitment
7. Flexibility/Learning Ability

For each area you can simply comment on whether or not your employee(s) fulfill your expectations for the position or you can set up a rating scale from one to four or five.

The key point in evaluating staff performance, is using concrete examples of performance that support your rating of the employee in each area. This is what would justify any corrective action you may need to take with an employee.

Remember to have your employee sign a copy of the evaluation to confirm that he has seen it and retain this copy for your records.

EVALUATION FORM - SAMPLE

NAME: _____ EMPLOYEE #: _____

APPRAISAL PERIOD FROM: _____ TO: _____ HIRE DATE: _____

PRESENT DUTIES: _____

PERFORMANCE FACTORS:

JOB KNOWLEDGE	5	4	3	2	1
JOB SKILLS	5	4	3	2	1
TEAM WORK	5	4	3	2	1
TIME MANAGEMENT	5	4	3	2	1
ETHICS AND INTEGRITY	5	4	3	2	1
COMMUNICATION	5	4	3	2	1
INITIATIVE/COMMITMENT	5	4	3	2	1
FLEXIBILITY/LEARNING ABILITY	5	4	3	2	1

SUPERVISOR'S
COMMENTS: _____

OVERALL
PERFORMANCE: _____

EMPLOYEE'S COMMENTS: _____

OVERALL
PERFORMANCE: _____

SUPERVISOR'S SIGNATURE DATE

EMPLOYEE'S SIGNATURE DATE

YOUR SIGNATURE INDICATES THAT YOU HAVE READ THIS REVIEW. IT DOES NOT NECESSARILY INDICATE YOUR AGREEMENT WITH IT.

PERFORMANCE FACTORS**JOB KNOWLEDGE**

- Follows company policies and procedures
- Complies with specific procedures and assigned work
- Knows and understands the job description of an Attendant/Homemaker

JOB SKILLS

- Has practical skills to meet job requirement
- Able to perform all aspects of assigned work as required

TEAM WORK

- Shares knowledge and information with others
- Takes responsibility to help team and others
- Actively participates in team meetings
- Cooperates with others
- Handles conflict to bring about a positive result

TIME MANAGEMENT

- Attendance is good and meets job requirements
- Is punctual
- Complies with time allowed for breaks and lunch
- Does not spend unnecessary time off the job
- Does not conduct personal business on work time
- Uses time wisely

ETHICS AND INTEGRITY

- Adheres to the Employer's code of ethics
- Demonstrates honesty and integrity in all aspects of job responsibilities

COMMUNICATION

- Listens and is able to follow through
- Is able to follow written instructions/guidelines
- Communicates clearly, both verbally and in written form

INITIATIVE/COMMENT

- Identifies problems and takes appropriate action
- Willingly accepts responsibility and performs expected and unexpected tasks
- Demonstrates tenacity and initiative in completing tasks and solving problems
- Willingly exerts extra effort, when necessary, to get the job done
- Expresses and follows through with creative ideas

FLEXIBILITY/LEARNING ABILITY

- Demonstrates willingness (and flexibility) to change job assignments
- Willing and able to learn new methods, skills and techniques

PERFORMANCE RATING DEFINITIONS

<u>RATING</u>	<u>DEFINITION</u>
5	Performance exceeded the position requirements in all key areas evaluated and was characterized by major, outstanding achievements seldom accomplished by most employees within the project.
4	Performance exceeded the position requirements in most key areas evaluated and were characterized by significant achievements not typically accomplished by most employees within the project.
3	Performance met position requirements in the key areas evaluated, and may have exceeded requirements in some areas.
2	Performance met most but not all position requirements in most key areas evaluated. Additional coaching or more frequent reviews of performance may be required.
1	Performance is not meeting the requirements in the key areas evaluated. Significant short term improvement is required for continued employment in the current position with the understanding that additional coaching will be necessary.

**RESOLVING CONFLICTS**

As well as conflicts caused by differences in motive, values, and personalities, there are situational conflicts. Specific incidents at specific times causing conflict are situational conflicts. These may require problem solving as outlined previously.

Aside from problem solving, we need to look at the possible response techniques to situational conflict used by either yourself or your attendant.

The three possible types of responses are passive, aggressive, and assertive responses. Passive and aggressive responses are self-defeating, whereas assertive responses are self-enhancing.

Passive Response

The behavior associated with this response is usually self-denying, inhibited, and emotionally dishonest.

The person using passive response techniques lets others choose for them and ends up feeling disappointed at the time and possibly resentful later.

Ignoring your own rights or allowing others to infringe on them, and not expressing your own ideas, feelings, and needs are characteristic of a passive response.

Why respond this way? The person is trying to avoid confrontation, tension, conflict, and risky or unpleasant situations.

Aggressive Response

The behavior associated with this response is usually self-defeating, hostile, and defensive.

The person using aggressive response techniques makes choices for themselves and others, and ends up feeling self-righteous and angry at the time, and possibly guilty later.

Ignoring the rights of others while standing up for your own rights, and expressing your ideas, feelings, and needs while trying to dominate or even humiliate others are characteristics of the aggressive response.

Why respond this way? The person is trying to achieve their goals but by venting anger they can wind up feeling frustrated and alone because they distance themselves from other people.

Assertive Response

The behavior associated with this response is usually self-enhancing, expressive, and emotionally honest.

The person using assertive response techniques makes their own choices and feels good about them at the time and later.

Standing up for your rights while not violating the rights of others, and expressing your ideas, feelings, and needs are characteristic of the assertive response.

Why respond this way? The person usually achieves their goals while improving their self-confidence and having honest relationships with others.

Direct and honest communication without trying to dominate others or avoid conflict should be the goal of every Manager. Trying to get what is wanted through manipulative or devious means or domination will only harm an employer-employee relationship. Choices made and communicated assertively are done without harm to oneself or others. The following examples of responses show the different response types in a particular situation.

SITUATIONAL CONFLICT

An employer who has paraplegia is dressing for an evening at the theatre. She has chosen to wear a jumpsuit. Her attendant feels a dress would be easier and quicker to put on.

The employer accepts the attendant's directions. The attendant has met their needs but the employer has given away control.

Aggressive Response

The employer refuses and complains about the attendant/ homemaker making choices for her.

The employer has met their needs through the use of anger, but the attendant/homemaker has been dominated and the relationship could be damaged causing retaliation from an angry attendant.

Assertive Response

The employer states her wish to wear the jumpsuit and explains her preference.

The employer has followed through on her choice and perhaps increased her attendant/homemaker's understanding of her needs. There should be no harbored anger or animosity to affect the relationship.

The above example shows how an employer would respond to a situational conflict. An attendant will also have a pattern of responses. It would be wise to think through how you would handle a passive, aggressive or assertive response from them in a situational conflict. You could use the situation of an employer asking the employee to work an extra hour on an unfinished chore when the employee has other plans.

In any relationship it is important both parties understand each other's needs. Nowhere is this more important than in a relationship where one party is doing personal tasks for another. Using assertive responses is an effective communication tool for problem solving and resolving conflicts through compromise. In this way a solution is arrived at that all parties have contributed to and are comfortable with.

The last word in responses is that not all responses have to be assertive. In a situation where the end result is not that important to you, you may choose to use a passive response. As well, if you have responded aggressively, all is not lost. Usually a simple apology for blowing up, as long as it doesn't happen too often, will help repair any damage that has occurred to the relationship.

REPLACING STAFF

The act of accepting a resignation or removing a person from a job is the last step of the process and the step where the process begins all over again. For the purposes of this manual we are including evaluation, termination of employment, resignation and emergency backup in this chapter. The reason for this is that evaluation can lead to resignation and/or replacements.

TERMINATION/RESIGNATION

Termination of employment can be a very sensitive matter whether initiated by the employee or the employer. Many employers do not fire staff because of fear of lawsuits, sympathy for employees and procrastination. Below, we will look at the rights and responsibilities of both the employee and employer regarding termination.

Employer Termination of Employee

What is notice of termination?

The notice period is the amount of time an employee or an employer has to give the other before ending employment. The employee continues to work their regular hours and perform their regular duties during the notice period.

Do employees need to give notice of termination?

Yes. The amount of notice depends on how long they've been employed by the same employer:

at least 30 days but less than one year	one week
at least one year	two weeks

Do employers need to give notice of termination?

Yes. The amount of notice depends on how long employees have worked for the same employer:

at least thirty days but less than one year	one week
at least one year and less than three years	two weeks
at least three years and less than five years	four weeks
at least five years and less than ten years	six weeks
at least ten years	eight weeks

Employers can either allow the employee to work out this notice period, or pay wages in lieu of notice, for the same number of weeks, or a combination of both.

Again, as an employer, it would be wise to KEEP A WRITTEN RECORD of the details of the firing of the employee. One suggestion is to give the employee a WRITTEN NOTICE OF TERMINATION and ASK THEM TO SIGN IT.

In the three cases below a person can be FIRED ON THE SPOT with no notice.

- 1) where an employee is found to have been STEALING,
- 2) where there is considered to be IMPROPER CONDUCT on behalf of the employee,
- 3) where the employee is INSUBORDINATE.

Again, if you are to fire someone for any of the above three reasons, ensure that you can prove the allegations as you can be challenged legally by your ex-employee.

The EMPLOYER may WITHHOLD the employee's REMAINING PAY up to an amount equal to one pay period IF PROPER NOTICE HAS NOT BEEN GIVEN by the employee. It is advisable, however to call the Employment Standards Branch to check out the proper procedure on withholding money in such a situation.

There are many different approaches to the termination process. It is hoped that the period before the actual firing would be used to attempt to work out any problems that may arise during the normal day-to-day relationship between the employer and employees. The employer should also remember that if all attempts at resolving the problem have been made that dismissal may be inevitable. The firing should be in full recognition that it can be a very difficult but necessary process.

EMERGENCY BACKUP STAFFING

It is vitally important that you consider and plan for the possibility of your attendant not being available for work with little or no notice. This could occur if your attendant is unexpectedly ill, resigns suddenly without notice, or if you have occasion to fire an attendant without notice.

Although one hopes this will not occur it must be planned for. Perhaps you could call on a relative, friend, or neighbor for a few hours, or a few days. Don't wait for such a situation to occur! Plan for this possibility when you have time to confirm your alternatives with those you wish to involve. To reinforce the importance of this planning consider the frustration you would experience if one morning your attendant was unable to come in and you could not get out of bed or go to the bathroom.

Another possibility, which should be explored, is contacting other Self-Managers and forming a self-help group. Or, former employees may consider assisting in an emergency. You could also contact existing consumer groups such as the Independent Living Resource Centre to inquire if they have any help options.

If the above replacement options are not open to you, you might consider forming a relationship with one of a number of private companies that could provide an attendant or a homemaker. These are listed in the yellow pages. Again, it would be wise to form this relationship well before an emergency occurs. One point to consider is that if you must call a company without forming a relationship, including negotiating affordable rates, the cost may be prohibitive.

As well as emergency backup situations, there are other times, such as statutory holidays and vacation time that you will need to plan for ahead of time.

CHAPTER 7

YOUR LEGAL OBLIGATION



This chapter is designed to assist you in understanding the various employment relationships and legal responsibilities. It defines employee or contract relationships as well as explaining optional relationships, such as casual, domestic, and regular part-time employees. The steps to becoming an employer are reviewed and the legal duties of an employer are summarized.

EMPLOYEE OR CONTRACTOR

DEFINITIONS

The Employment Standards Act of Manitoba defines "employee" as follows:

A person engaged by another to perform skilled or unskilled manual, clerical, domestic or technical work or service, or professional work or service.

NOT included in this definition and relevant to the purpose of this manual are:

- i) an independent contractor;
- ii) a person employed in domestic service in a private family home and remunerated by a member of that family where the person is not employed for more than 24 hours in a week by the same employer.

"Independent contractor" is defined as:

A person who undertakes with another person to produce a given result but so that, in the actual execution of the work, he/she is not under the orders or control of the person for whom he/she does it, and may use his/her own discretion in things not specified beforehand.

The distinction between employee and contractor is important also in the context of federal legislation covering the Canada Pension Plan (CPP) and Employment Insurance (E.I.). When an employer-employee relationship exists certain deductions may have to be made from gross salary. For purposes of this federal legislation, "an employer-employee relationship exists when the person paying for the services has the right to control and direct the person performing the services. Control includes not only the result to be accomplished by the service but the means by which the desired result is accomplished."

An employer-employee relationship implies that the employer must meet legal obligations concerning CPP and E.I. premiums and income tax (if applicable), minimum working conditions, and payment of workers compensation premium.

A buyer-contractor relationship eliminates the need for payroll administration. A person might want to establish him/herself as an independent contractor to provide certain services under contract for a number of disabled service buyers. The implications for the disabled buyer would be little administration, less control over how the work is to be performed, and possibly a high price. This merits some explanation.

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An independent contractor does not have the protection that an employee enjoys under the Employment Standards Act, the Workers Compensation Act, and the Employment Insurance Act. The contractor is carrying on a business.

As a self-employed person the contractor can obtain coverage against accidents on the job only by private insurance. He/she must pay both the employer and employee shares of the CPP premium and pay income tax in quarterly installments. Since an independent contractor cannot receive employment insurance benefits, he/she must make his/her own provision for income during periods of unemployment (no clients), illness and vacation time. Expenses made to carry on a service business as an independent contractor are tax deductible for the latter.

In case of doubt whether or not a contractual relationship is an employer-employee or buyer-contractor relationship, a ruling should be obtained from the Employment Standards Branch and Revenue Canada.

EXEMPTIONS

The Workers Compensation Board in Manitoba exempts employers from paying workers compensation premium for domestic workers employed for not more than 24 hours in a week in a private family home. If the employee works under 24 hours on a regular basis contact Workers Compensation for a ruling. If a domestic worker works more than 24 hours on a regular basis for one employer in a private home, the employer must register with the Board. This can be done by telephone. The employer will be told what procedure must be followed and the amount of premium he/she must pay. The Workers Compensation board considers personal care attendants to be domestic workers, for purposes of their legislation.

A few basic elements of the legislation mentioned in this section will be reviewed in the manual "For the Record", which explains also record keeping requirements imposed by statute.

OPTIONAL EMPLOYEE RELATIONSHIPS

1. A Casual Employee

- on-call, relief employees on a short-term basis under supervision.
- usually for emergencies and/or backup re absent regular staff, sickness, vacation time, statutory holidays, etc.
- Wage deductions for CPP and E.I. required, plus 4% vacation pay.

2. A Domestic Employee

- providing less than 12 hours of services per week
- or a live-in providing less than 24 hours per week (See special rules from Workers Compensation Board)

3. A Regular Part-Time Employee

- with an agreed upon scheduled range of hours of services
minimum legal benefits required.

- extra on-call casual hours often negotiated to provide relief or
backup for other staff absenteeism.

4. A Regular Full-Time or Near Full-Time Employee

- with a specified schedule and regular employee benefits.

- often available for on call casual emergency work if near full- time
hours scheduled.

STEPS TO BECOMING AN EMPLOYER

The act of hiring an employee makes you into an employer with all of the legal and financial responsibilities associated with employer-employee relationships. You have an obligation to know the rules and legal requirements of an employer.

Before hiring, an employer has the following responsibilities:

APPLY FOR A BUSINESS NUMBER FROM CANADA CUSTOMS AND REVENUE AGENCY

A business number can be obtained, by phone or mail, from:

District Taxation Office
325 Broadway Avenue
Winnipeg, MB R3C 4T4
1-800-959-8281 - General Inquiries
1-800-959-5525 - Source Deductions (payroll inquiries)

Online: - Google – “Register for a Business Number”

As an Employer registering you will need to provide your:

- a.) Name of Business (your name)
- b.) Address
- c.) Social Insurance Number
- d.) Type of Employment (**Personal Care Services**)
- e.) Expected date work will begin

To register as an employer, telephone Source Deductions 1-800-959-5525. Advise them that you are registering for payroll deductions only. They will complete the registration form over the phone and send you:

- A copy of the registration for your records
- A Canada Customs and Revenue Agency Employer's package with necessary forms and information for you to complete. These will usually include a set of TD1 Employee forms and source solution booklet for CPP, EI and Income Tax.
- A source deduction remittance form PD7A™ E (00) which is used when sending in your employee deductions and employer expenses.

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- Any Human Resource Centre (See Appendix page 44) should also be contacted to obtain a supply of "Record of Employment" (ROE) forms, sometimes called a separation slip, required by Human Resource Centre's Employment Insurance. The employer must issue this form within 5 days of the last date of employment.
- All employees will have EI deductions, some will also qualify for CPP and Income Tax deductions. This makes you an "employer" in the eyes of Canada Customs and Revenue Agency and you will have to register in order to send in your employee and employer deductions (remittances).

Note - If you contract out the services you need (purchase services from a private company or self-employed individual), you are not considered an employer i.e. you do not make deductions. Since there are no deductions being made by you, registration as an employer is not required. Hire first, then apply for a ruling with Canada Customs and Revenue Agency on whether the service provided is contractual.

APPLY FOR WORKERS COMPENSATION INSURANCE

The Workers Compensation Board of Manitoba
333 Broadway Ave
Winnipeg, MB
R3C 4W3
General Phone: 954-4321
To Register: 954-4505
To make a Claim: 954-4100

The Workers Compensation Board should be contacted as soon as you register as an employer with Canada Revenue Agency. Remember that registering with Canada Revenue Agency does not register you with the Workers Compensation Board of Manitoba. Workers Compensation will confirm your assessed rate for providing income insurance in case of an employee injury or sickness related to the job. In return for registering with Workers Compensation, the law protects you, the employer, from lawsuits against lost wages.

Workers Compensation is mandatory for employees, working as attendant/homemakers, who work the minimum (24 hours a week or more), on a regular basis. Under 24 hours a week on a regular basis the employer should:

- apply to the Workers Compensation Board, Assessments Branch for a decision
- employees working under 24 hours a week are eligible to apply for coverage of Workers Compensation, but it is not mandatory

APPLY FOR EMPLOYER LIABILITY INSURANCE

Remember that you, as an employer, are responsible for your staff's safety, whenever he or she is on the job with you, or assigned by you to carry out a task for you. The Self/Family Manager's agreement requires that you have the proper insurance. Contact your insurance agent for your Home Owner's Insurance Policy to be certain it includes an extra rider covering liability insurance for your paid staff. This should only cost approximately \$10 - \$12 extra per year and often is included as part of your regular Home Owner's Insurance Policy.

It would also be a very good idea to ensure that your whole range of fire, accident, and liability insurance associated with both your home and driving vehicle is always in force and adequate to cover your entire staffing situation.

OPEN A SEPARATE BANK ACCOUNT

This will help you maintain accurate financial records for Canada Customs and Revenue Agency, the Employment Standards Branch and/or the Labor Board, and the Winnipeg Regional Health Authority. Remember that a separate bank account is a requirement of your Self/Family Manager's agreement and that WRHA will be doing audits. Have your bank statements and cancelled cheques returned to you monthly. Maintaining a bank journal (transaction registry) register e.g. page 23 will assist you in managing your account.

SUMMARY OF EMPLOYER DUTIES

Regularly Evaluate your own Job as Manager

This might be your most difficult task. We seldom look at our performance as the employer, how fairly we assign tasks, communicate our instructions with clarity, or forewarning. We can seek out information on how others see us to assist us with this process.

e.g.

- Ask your staff for feedback on a regular basis.
- Ask yourself if you are living up to the points and spirit of your Employment Agreement.
- Ask yourself if you constructively and promptly clarify your concerns when they arise and provide motivation and appreciation for staff work accomplishments on a regular basis.
- Ask yourself how you would like to work for another Manager like yourself.

ENSURE YOUR INSURANCE PREMIUMS ARE PAID ON TIME

A. PRIVATE INSURANCE PREMIUMS are to be paid on time for the Liability Coverage on your:

- Home owners Fire Insurance
- Vehicle/Autopac Coverage

B. WORKERS COMPENSATION PREMIUMS

The employer must pay Workers Compensation premiums for each employee who works a minimum of 24 hours **per week** for three consecutive weeks. An estimate of the annual gross earnings for the employee must be submitted to the Workers Compensation Board (WCB). The employer will be assessed on this estimated at the rate of \$1.60 per \$100.00 gross earning.

Example:	Employee estimated annual gross earnings	\$15,000
	Divided amount by 100 = \$15,000/100	150
	= 150 x \$1.60*	\$240.00 annual premium.

*The rate of \$1.60/100 is based on the established rate for 2012. Check with Workers Compensation Board for the current amount.

To maintain an active file with WCB, the employer is required to pay a minimum yearly premium of \$100.00. The estimated annual premium due may be paid in full at the beginning of the year, or it may be paid up to three payments within the year.

By February 28 of each year, the employer must submit a report of the actual employee's earnings for the previous calendar year and an estimate for the current year. The amount of the actual earnings determines the actual premium due for the previous year. The premium due is compared to the amount you have paid for the previous year to determine any differences. An overpayment would be subtracted from you estimated premium for the current year. You would receive a bill for an underpayment, which would be due immediately. This process is then repeated annually.

CANADA REVENUE AGENCY DEDUCTIONS

Once Canada Revenue Agency has issued you a Business number, you will receive guidebooks with tables and information about employee deduction and employer costs. An employer who has difficulty working with the tables referred to below can request assistance. When given all essential information by telephone, an employee of the Department will help with any information needed and check the tables for deductions.

Three deductions may have to be made from each employee's gross wages. For complete and detailed information the reader is referred to the following publications for employers available from the local office of Canada Customs and Revenue Agency:

1. Canada Pension Plan Contributions.
2. Employment Insurance Premium Tables, including instructions for employers.
3. Income Tax Deduction at Source Table.

Employee Payroll Record Keeping Requirements

Revenue Canada and Manitoba's Employment Standards Act requires each employee's payroll information be kept current and up-to-date.

- . Records must be kept for 7 years.
- . The Income Tax Act requires any employer who withholds or deducts funds to keep accurate records and books of account.
- . Once a TD1 Employee Form from Revenue Canada is completed with a staff person's Social Insurance Number, you, as an Employer must deduct,
 - Canada Pension Plan (CPP) contributions
 - Employment Insurance (E.I.) premiums
 - Income Tax from Gross Salary, if applicable re: the employee's TD1 tax bracket

As an Employer you must also pay and remit an equal amount of CPP and 1.4 times the amount of E.I. premiums your staff is required to pay.

- . Set up an Employee Wage Sheet for each staff person, whether she/he works full-time, live-in, hourly, casual, relief, etc.
- . The Manitoba Employment Standards Act requires an employer to have available written records and/or information at each pay period.
 - hours worked - regular and overtime
 - wages paid
 - Employee Deductions made at source
 - Statutory Holiday payments
 - additional Taxable Benefits (See 4. Above)
 - period of employment
- . Accurate records or schedules of the dates and time your staff worked, whether full-time, part-time, live-in or casual.
- . Complete one Payroll Record Sheet or card for each staff member for each calendar year.
- . Upon Termination of Employment for any reason you must complete and issue a RECORD OF EMPLOYMENT (ROE) within 5 days of a staff person's last day of work. This allows them to claim E.I. benefits, if eligible.

Store Backup Copies of Records

Payroll Records can be lost through fire, theft, moving, and discarding. For your safety it may be very worthwhile arranging for photocopies of your latest records every second or third month to be stored with a relative in a separate location.

For further details on employer financial obligations and payroll record keeping see the Self-Managers Financial Planning Kit, "For the Record".

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