

# SECTION 7

## Training Your PA

- Preparing Your PA to be Successful
- Setting Your Expectations
- PA Rights and Responsibilities
- Learning Styles
- Understanding Culture
- Training
- Orientation
- PA Task Planning Worksheet
- Section 7 Checklist



## Training Your PA

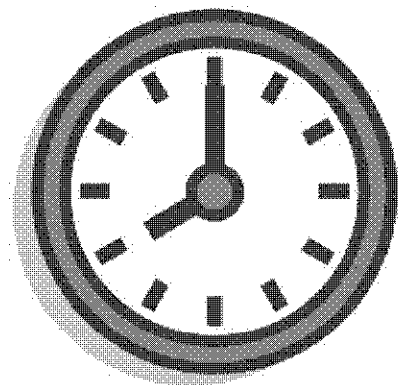
Finally, you've hired your Personal Assistant (PA) and you're ready to go back to your real life. Not so fast! You've spent a lot of time creating your job description and finding someone who fits into your life with the qualities that are important to you. To be sure all of your hard work pays off, you will train the PAs you hire so they have the knowledge they need to provide the services you want.

This section on training will look at:

- setting your expectations early,
- some ideas to help you provide the training your new PAs need and deserve, and
- some tips for orientation on your PA's first day.

### Preparing Your PA to be Successful

In Section 2 - Developing Your Job Description, you identified the qualities and skills your PA should have to be able to do the tasks that you outlined in your job description. You and your PA agreed to these tasks when you both signed the job description. In this section, Training Your PA, let's start by taking a look at your expectations of your PA's job performance. To do this you will look at each of your job tasks and determine what your PA must do to do the task right. Remember that the clearer you are with your expectations, the less likely there will be any misunderstandings.



For example, your job task is “work from 8 a.m. to 10 a.m., Monday through Friday.” One of the qualities you want your PA to have is to be punctual. The job starts at 8 a.m. What are your expectations? In other words, what does “start at 8 a.m.” mean to you? Do you mean that your PA walks in the door at 8 a.m. and spends 5 minutes getting ready to work? Do you really mean: come 5 minutes early and be ready to start work at 8 a.m.? Or do you mean come to work around

8ish? Deciding what your expectations are for your PA's job performance will save you time and effort.

## Setting Your PA Performance Expectations

Take a look at some ideas to get you started thinking about PA performance expectations in these areas:



- communication
- attitude
- crisis management
- personal appearance
- time management
- work schedule
- record keeping
- confidentiality

You may find it helpful to highlight or underline the performance expectations in these lists that are most important to you. As you work through each item, decide if there is an expectation you have that is not listed and write it in. There is space at the end of each area.

### Communication:

PA must be able to communicate with employer using the employer's preferred use of language (for example, language spoken, sign language, communication device, etc.). PA must be open and honest at all times and able to discuss issues that may be uncomfortable. S/he must be willing to accept direction from employer and follow that direction. S/he must be able to accept disciplinary action and/or suggestions as directed by employer.

Other

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### Attitude:

#### Work Commitment

PA will leave personal problems at home and report to work in good spirits. PA will be ready to provide quality care and make every effort to do a good job and meet the needs of employer as directed.

### Building Relationships

PA will work to develop and maintain a friendly and professional rapport with the employer.

### Teachable

PA must be willing to be trained and learn the employer's preferred methods of service provision. Training may be an ongoing and/or changing process as the needs of the employer may change. Be flexible and open to changes that may be necessary.

### Respect

PA will always use proper manners when speaking to and working with employer. Whether in the home or out in the community, PA will show respect to their employer by the way they speak, act and provide assistance.

### Other

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### Crisis Management:

#### Problem Solving

PA must be able to assess needs within agreed upon duties and present reasonable solutions or a plan to meet those needs. S/he must be able to remain calm and look at any situation rationally.

#### Emergency Care

PA must have the ability to remain calm and provide immediate care to employer in order to ensure his/her health and safety and prevent further danger or injury. S/he must be able to contact emergency services in order to resolve the situation (for example, police, ambulance, fire department). PA must follow emergency procedures as outlined by the employer. See Section 9 for some emergency planning ideas.

### Other

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## Personal Appearance:

### Dress Code

PA will wear proper attire during working hours. The employer decides but proper attire should consist of comfortable clothing and shoes. This may include nice shirts, no torn shirts or shirts with vulgar logos. Pants should fit properly, not hang down or be too baggy or too tight. Shorts and skirts should not be too short. Shoes should be nice tennis shoes or comfortable working shoes.

### Cleanliness

PA will practice good personal hygiene before reporting to work. It is important that the PA be clean and smells clean. Wear hair in a manner that it will not be in your face or get into food, or your employer's face. Do not wear perfume or cologne.

### Other

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## Time Management:

PA will complete all jobs on time. Be sure to maintain quality of care. If the PA feels more time is needed to complete a task, discuss it with the employer to avoid creating a stressful environment.

### Other

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## Work Schedule:

### Punctuality

PA will report to work on time and be ready to begin.

### Schedule/Reporting

PA will be considerate of the employer's scheduling needs and will call employer in advance or as soon as is possible if the PA is unable

to make it to work or will be late. If the PA needs to schedule regular or expected time off, the PA must do so at least two weeks prior to the date(s) needed.

Other

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#### Record Keeping:

PA will maintain time sheets, any daily log documentation necessary, employer's calendar of appointments if necessary and work schedule. All documents will be kept neat and organized in space designated by employer. Note that the State of Kansas and Medicaid can charge a PA with fraud if he or she records hours on a time sheet that they didn't work.

Other

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#### Confidentiality:

PA will not share any information learned about employer with any person or agency without the employer's expressed written consent. This includes but is not limited to medical history and condition, personal preferences, personal care needs, family information, personal finances and appointments.

Other

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### Developing Policies and Procedures

As you become an experienced employer, you may find that some behaviors just have to happen. For example, PA's cannot have a pattern of being late and work for you. You may establish a policy that applies to being late. You might say that being late three times automatically means

that the employee's job will be reviewed. This lets your PA be aware up front that his or her behavior has consequences. For some ideas about policies, check out Appendix F.

## **Rights and Responsibilities of the Personal Assistant (PA)**

As you prepare for your working relationship with your new PA, consider that your PA has some things he or she will expect from you. As you well know, with any list of rights comes some responsibilities. You may want to review this list, or one that you write, with your PA as you begin orientation and training.

### PAAs have the right to:

- be treated with respect
- be provided with equipment and supplies that are needed to complete assigned duties
- receive requests for any additional duties or schedule changes with as much advance notice as possible
- request time off with adequate notice
- be paid on time
- work in a pleasant, safe, non-threatening environment

### PAAs responsibilities include:

- Always be on time
- Be honest and open about his/her feelings
- Knowing their own skills and limitations and be able to discuss them with employer
- Provide reliable, safe, high quality services, as directed
- Respect employer and his/her right to privacy and confidentiality
- Notify employer as soon as possible when s/he knows that s/he will be late or unable to work
- Plan time off with employer and give ample notice
- Give at least two weeks notice before making changes or quitting
- Complete job duties as directed
- Accurately recording the hours that they work



## Learning Styles

Adults learn best when training material is presented in a way they prefer. Some people like to learn by reading the directions, some by watching a demonstration, while others want someone to tell them the material. You can help your PA be successful by presenting your training in ways that match your PA's preferred learning style.

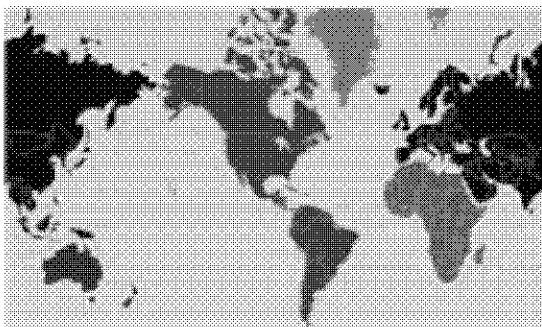
Many trainers use a strategy that you may find helpful. They present their task or information to be learned in several different ways or learning styles.

Examples:

- Visual learners want to see the information they are learning, so consider writing out the steps to the task, including a chart, or a picture.
- People who learn best by listening will do well if you explain what you want done.
- Some people will want to see and hear the information.
- Others will need to try the task for themselves.

Check often to determine if your PA understands what you are training.

People have their own best ways to learn. A discussion about learning styles with your PA will help you plan your training.



### Understanding Culture

Just as presenting material in a person's best learning style promotes learning success, being sensitive to other people's point of view and background encourages open communication between you and your new PA. As you get to know your PA check often for mutual understanding of tasks and instructions.

For example:

- When you say, “Please put away the milk”, you may mean: put the milk back in the refrigerator. In some cultures, milk is properly put on a shelf in a cabinet.
- When you ask if someone is a good cook, you may mean something other than microwave cooking. Checking for understanding will help you and your PA avoid unnecessary miscommunication.

Being culturally aware includes different ethnic and cultural backgrounds but can also apply to a difference in ages, being brought up in a different part of the country or being from a city or a rural area. People grow up eating different foods, relating to people in different ways, and enjoying different recreational activities. Being from different cultural backgrounds can be an interesting and positive experience for you and your PA by recognizing differences, listening carefully, and keeping the lines of communication open.

## **Training**

At first, it may seem awkward to train someone to assist you, but in time, it will become natural. Remember, you are the best person to train your PA to work for you. You probably have more experience in training others than you realize.

- You may have told family members, friends or other staff how to meet your needs.
- There may have been times away from home, at camp, school, in the hospital or on a business trip when you instructed a stranger on how to help you.

Training your new PA will be similar to that experience. Only this will involve more detailed structure and you now have your own tools (job description, checklists, guidelines, etc.) to help you as you train.

If the whole idea of training someone seems too overwhelming, remember you don't have to do this all alone. Get help from someone who is familiar with your needs such as a family member, trusted friend or your case manager.

## Getting Started

It is best to start training a new PA when there are no timelines to meet. Plan enough time so both of you can be as relaxed as possible without being rushed. Don't squeeze everything into one session.

Expect your new PA to be nervous. If you have never used a PA before, you may be nervous too. This is OK. Just remember to take your time and talk openly with your PA so you will both be comfortable. The training process is tiring, try to have patience and keep your sense of humor. It can be a lot of fun getting to know this new person in your life.

You'll notice there is often a huge improvement in performance of job duties between the first day and the second day. As the days go by, there should continue to be improvement as you establish a rhythm of how to work together. Some people say that it seems to take about five days, or five 2-hour sessions, to break in a new person. It's helpful when the trainee can work these five times fairly close together. If he or she is only scheduled to work once a week, training can take a whole month, and you may have to quickly review what you did the last time before the start of each training session.

## What Will You Teach?

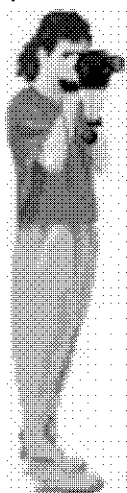
This is where you get part of the pay off from all your work developing your job description. When you and your PA signed the job description, you agreed on the duties and responsibilities that make up the job. This is the list of what you want your PA to do, so DOING these tasks to your satisfaction is WHAT you'll train your PA to do.

## Choosing Your Method

If possible, you may want to have a PA who already works for you to be a part of the training. It can be helpful for your new PA to watch how you like things done. Even if it is a family member or friend who helps you, see if they are willing to help show your new PA how the two of you do things, and what works best. Of course, you may prefer it be just the two of you. If you feel this is the easiest way to train your PA, then that is the way you should do it. Choose the method that is best for you.

If you have personal care needs that you plan to receive assistance with, you may consider making a videotape for your PAs to view in order for them to learn the way you want them to assist. Sometimes it is difficult to verbally direct someone through a task involving hands-on assistance. Some of the tasks you may consider making a videotape for may include:

- Range of motion exercises
- Safe transfers and lifting procedures
- Lift equipment operation



### **Some tips for making your own personal PA Training Video**

- Decide what tasks you want to show on the video.
  - Have someone run the camcorder while you have an assistant performing the task to be videotaped.
  - As the assistant is performing the task for the taping it is also helpful for you or them to explain what they are doing. For example, when moving the lever to lower the lift he or she may say, "The lever to lower the lift is on the left side. It must be pressed down until the sling is at the same level as the bed."
- After completing the taping of all desired tasks label the tape "PA Training Video." You may consider covering the videotape case with brightly colored contact paper so that it will be easy to find if it is stored with other videotapes in your home.

### **Training Tips**

1. To start each training session, tell your PA what you will teach. At the end of the session, summarize what you have taught. Many trainers use this strategy, which is simply:
  - tell them what you're going to tell them
  - tell them what you want them to learn
  - repeat what you told themIf you have a second session, briefly review what you taught in the first session and then begin your new material.

2. When giving instructions for a task, such as transferring out of the wheelchair, describe each step of the task.
3. Do not assume that your PA will understand your explanations. Ask for feedback and encourage questions.
4. When you explain any task or routine to your PA, describe why it is important to you that something is done in a certain way or at a specific time.
5. Be consistent in your explanations, and if you change your task or routine, explain why you have changed it.
6. Be patient. Your PA probably will not get all your directions right the first time.
7. Try to be aware of how much new knowledge the PA can learn effectively. Some individuals may be able to learn a whole task or routine at once, while others may require more gradual training sessions.
8. If possible, have a friend, family member, or previous PA demonstrate tasks and routines to your new employee.
9. Give your PA both constructive feedback and positive feedback. For example:

- **Constructive feedback:** Your PA won't know they are doing something wrong unless you provide appropriate feedback.

When your PA does a procedure incorrectly, bring it to their attention and patiently remind him or her of the correct way to do it.

- **Positive feedback** praises correct performance by telling your PA exactly what was performed correctly.

Examples of positive feedback:

"My hair feels so clean. You really did a great job of washing it today."

"Lunch tasted very good. The chicken was cooked just right."

For additional training resources, classes, and materials, contact your local community developmental disability organization, your community service provider, or center for independent living.

## Communication

Getting a sense of yourself as an employer may be hard at first. You are responsible for making decisions about your personal care. Never assume the PA knows what you mean or what you need. Be assertive, be direct and set boundaries.

Personal care tasks, such as bathing, dressing and toileting can be uncomfortable at first. We all have to deal with these issues on a daily basis. Be assertive and make your instructions clear and easy to understand. Sometimes a sense of humor helps put everyone at ease. Using a written checklist might help.

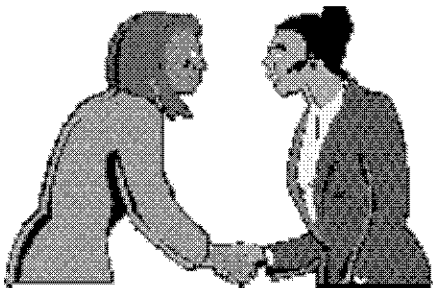
When you begin the actual process of training your PA, remember to be patient. S/he may not get everything the first or even the second time. It is important for you to be direct and continue instructing until you both feel secure.

Setting boundaries will help you establish your role as well as the PA's role. This will give both of you a better sense of the employer/PA relationship. Talk often about what you and the PA expect from each other.

Open communication with your PA is your best defense against misunderstandings and disagreements. You'll find more information about resolving misunderstandings and disagreements in Section 8 – Managing Your PA (look for Resolving Conflict).

## **Orientation**

### Getting Ready for the First Day



The first day you begin work with your PA will be exciting and you might feel a little nervous. Your PA is probably nervous too. Your PA's first day is the perfect time to begin formal orientation and training. This gives you the opportunity to discuss your expectations and clearly explain the job duties. Try to schedule

the first day at a time when you will not have to rush. You will both feel better if you are able to be relaxed and take your time. When your new PA arrives, take a minute to have a friendly conversation and then start them on completing all necessary employment paperwork.

As you prepare for your new PA's first day of employment consider:

- Having a friend with you the first day
- Going about your typical routines
- Not minimizing your needs
- Being as organized as possible
- Thinking ahead: If your PA will be grocery shopping for you, decide how you want your PA to pay; such as having cash available or if you will pay them back after they make the purchases. Remind your PA of your need for receipts for store purchases.
- Setting your schedule for housekeeping and appointments
- Discussing feedback opportunities
- And at the end of the day, telling your new PA the things they did well.

Orientation and training are important even if your PA has experience because your situation is unique and different. Set a tone during orientation and training that you are the employer. Even though you may have discussed some of this information during the interview, orientation of a new PA should include:

1. A tour of your living space.
  - a. Show your new PA where supplies and equipment are kept.
2. Information about your disability.
  - a. Discuss your disability and anything specific your PA should know (i.e., Do you get more fatigued as the day goes on? Are you sensitive to cold? Do you have days that you can do more for yourself than other days?).
3. Explanation and Demonstration of PA duties.
  - a. Give an overview of the job duties.
  - b. Use a checklist, job description, or other method you prefer to explain specific duties in the order you want them done.
  - c. If it is possible, a great way to train your new PA is for them to observe an experienced assistant completing all the tasks. If

you have extensive attendant care needs you may find that you need more than one day to demonstrate job duties.

- d. Training instructions should be step-by-step and specific.
  - e. Consider making a training video.
4. Safety and Security
- a. Lifts and Transfers - Review safe procedures for completing lifts and transfers.
  - b. If you are requiring your PA to physically lift you, train them in proper lifting procedures to avoid injury to either one of you.
  - c. Discuss safety guidelines for any disability-related equipment the PA will be expected to use.
  - d. Reinforce safety guidelines for any household appliances or equipment the PA will be expected to use.
  - e. Discuss your emergency plan with your PA. For more information see Section 9.
  - f. How will your PA get in and out of your home? If you are not able to open the door, set up a procedure so that the PA can get in.
  - g. Universal Precautions - Reinforce the importance of washing hands thoroughly before preparing food, and before and after personal care duties. Discuss the use of plastic gloves if preferred.
5. Expectations – We started our discussion of training with some ideas to get you thinking about your expectations of your PA’s performance. Orientation and training starts on the first day. This is the perfect time to make sure your PAs understand what you expect. You’ll want to stress the topics important to you. Here are some examples to get you started.
- **Confidentiality** - What you say and do in your home should remain confidential. The kind of help being provided by your PA is not to be discussed with their friends, family members or other individuals they may work for. Be specific. Some people think that as long as they are not saying something bad about you, then what they say is not a violation of confidentiality. The PA should be reminded that it is not only disrespectful, but that violating confidentiality can be grounds for termination.



- **Use of household items** - Give some thought to your rules regarding use of the phone, the car, the washing machine, and computer/printer and eating your food. State these rules clearly at orientation. It is always easier to state the rules clearly during your first meeting, than to wait until after an offense has happened.
  
- **Other**

6. Review the rate of pay, schedule, and time sheet reporting requirements.

**Good Idea:** Introduce your PA to other PAs if possible. Peer support is just as helpful for you as it can be for your new PA.

Helpful Tools:

We have included four PA Task Planning Worksheets on the following pages. There is one for each of the categories: Personal Care, Domestic/Household, Health & Safety and Community. You may want to use these or develop your own to help you as you train your new PA.

**PA Task Planning Worksheet – PERSONAL CARE**

<b>Personal Care</b>	<b>Day</b>	<b>Task</b>	<b>How often?</b>	<b>How long?</b>	<b>Time of day</b>	<b>Notes</b>
Example Tasks:						
Taking a bath						
Brushing teeth with electric toothbrush						
<b>Reminder:</b> Think about natural supports and assistive technology options						

**PA Task Planning Worksheet – DOMESTIC/HOUSEHOLD**

<b>Domestic/ Household</b>	<b>Day</b>	<b>Task</b>	<b>How often?</b>	<b>How long?</b>	<b>Time of day</b>	<b>Notes</b>
Example Tasks:						
Making a grocery list						
Assisting with preparing dinner						
<b>Reminder:</b> Think about natural supports and assistive technology options						

**PA Task Planning Worksheet – HEALTH & SAFETY**

<b>Health &amp; Safety</b>	<b>Day</b>	<b>Task</b>	<b>How often?</b>	<b>How long?</b>	<b>Time of day</b>	<b>Notes</b>
Example Tasks:						
Reminder to take medicine						
Assist with mowing the grass						
<b>Reminder:</b> Think about natural supports						
and assistive technology options						

**PA Task Planning Worksheet - COMMUNITY**

<b>Community</b>	<b>Day</b>	<b>Task</b>	<b>How often?</b>	<b>How long?</b>	<b>Time of day</b>	<b>Notes</b>
Examples:						
Drive me to work						
Provide support for me at meetings						
<b>Reminder:</b> Think about natural supports and assistive technology options						

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PA Signature \_\_\_\_\_ Date \_\_\_\_\_

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Employer Signature \_\_\_\_\_ Date \_\_\_\_\_