Care Support Webinar
Finding, Hiring, Training, & Retaining Care Support Professionals

Rebecca MacTaggart
Government Relations Manager

Annie Streit
Grassroots Advocacy Manager
Meet Our Presenters

Nancy Thaler: Sr. Policy Advisor, Administration on Community Living (ACL), U.S. Dept. of Health and Human Services

Jackson MacTaggart: Graduate Student & Advocate

Alexandria Teixeira: New Hampshire Chapter Leader, Peer Support Coordinator & Advocate

Melinda Simms: New Hampshire Chapter Advocacy Coordinator & Advocate

Rodney Simms: Husband & Caregiver

Megan Meyers: Registered Nurse & Care Support Professional

Michael Kiel: Rehab Specialist, Author, & Advocate

Ron Hull: Author & Advocate
Care Support Professionals

• Care Support Professionals are...
  • Personal Care Assistants (PCAs), Nurse, Aides, etc.

• What is a Caregiver?
  • "Formal" caregivers are paid for their services and have had training and education in providing care.
  • "Informal" caregivers, also called family caregivers, are people who give care to family or friends usually without payment.

• The difference between a Home Health Aide (HHA) and a Personal Care Assistant (PCA)
  • HHAs provide both medical and non-medical services, suited for complex healthcare needs with additional training to perform a broader range of healthcare-related duties.
  • PCAs excel in non-medical care. Most states do not require PCAs to have specialized training.

https://globalonehomecare.com/pca-vs-hha-differences/
Hiring Care Support Professionals
Alexandria Teixeira

• Before interviewing, think about what your needs are write them down and have a set of interview questions prepared.
  • Experience with Activities of Daily Living (ADLs)?
  • Would you feel comfortable accompanying me in the community?
• When hiring your PCA make sure to introduce yourself and give a background with as much detail as you are comfortable with. This will establish the relationship between you and your care support professional.
• Clearly express your expectations/boundaries giving a “typical shift overview” sets both parties up for success.
  • Giving as much detail for each task will only benefit you and your potential caregiver leaving unwanted surprises.
• When making an employment offer make sure to discuss
  • Schedule
  • Rate of Pay
  • Benefits

Being prepared is the key to success!
Training Care Support Professionals
Melinda Simms

Benefits of Actively Participating in and Insisting on Training Your Care Support Professional

• **For You:**
  • Improves the mental, emotional and physical health outcomes
  • Safety
  • Consistency of care
  • Improves quality of care
  • Ensures compliance
  • Enhances client-caregiver relationship
  • Generates trust & confidence
  • Empowerment & Independence

• **For the Care Support Professional:**
  • Most times: College Degrees not required
  • Professional and Personal Growth
  • Physical Safety
  • Competence and Quality of Care
  • Job security
  • Enhances Your Client’s Trust
Formal Training

Whether you have a family caregiver, or you have hired a caregiver; it is critical that they are fully knowledgeable of the basic skills and certifications. A basic situation can have a very bad outcome, and quickly!

- Formal training provides the foundation of great care.
- Not all states require formal training.
- Kessler Foundation – Understanding Spinal Cord Injury: A Course for Personal Care Assistants
- Formal training also offers other more “specialized” courses that earn you recognized certifications, such as in - Diabetes, Dementia, Infection Control, Manager, and Medication assist, for example.
  - Hoyer Lift / Transfer Skills (ask an OT or PT)
  - American Red Cross Training Services
    - [https://www.redcross.org/take-a-class](https://www.redcross.org/take-a-class)
    - CPR & AED
    - First Aid
    - Infection Control
Informal Training

- Hands on / Client Specific
- This kind of training is important for the “polishing” of your care. This is when you communicate to your assistant or family member the what, where, when, how, and why you want your care done. This will make you an effective team!
- As suggested by caregiver, Rose Marie Mann - “First we have them watch while I do the care for a day or two. Next, we have them start to participate along with me, and then as they feel more comfortable with aspects of the routine, we have them start to do more. If they need me to review something, I remain there in the room to review it with them. Once they feel they can do it on their own, I just supervise for a period of time.”
Training Care Support Professionals
Melinda Simms

Caregiver Success
Checklists - Communication – Organization

1. Be brief - Make the steps as short as possible.
2. Put steps in correct order - Arrange the steps in the order in which they should be performed. Make sure to specify steps that are essential or often neglected.
3. Include what, when, where - State what materials are needed and when and where the task will be performed.
4. Much of the “how to” should be taught while the task is being performed.
5. IF IT ISN’T WRITTEN, IT WAS NEVER SAID!
6. Don’t assume they know what you want them to know.
Training Care Support Professionals  
Melinda Simms

- **Organization**
  1. Have an ample supply of medical, personal hygiene, and cleaning products.
  2. Color coding and marking items may be useful to new assistants or for those who rarely perform a particular task.
  3. Have your home organized, so that you know where things are located. Encourage your assistants to keep it this way.
  4. Be prepared - Have a folder or notebook ready for medical appointments with all your important information, including a current med list and insurance info. Doing so will make your appointments go smoother for you and your assistant.
  5. Develop a standard routine to get tasks done with the least amount of time and with the least disruption.
  6. Have realistic expectations. People don’t always get something right the first time. They make mistakes, but practice makes perfect.
Retaining Care Support Professionals
Michael Kiel

- **Empowerment & Ownership**
  - Taking responsibility
  - Clear directions
  - Problem-identification/problem-solving

- **Emotional Investment**
  - Aids want to be there, but they are paid very little
  - Use of humor
  - You are ultimately responsible for how they feel when they leave

- **Do they want to come back... Why?**
Care Support Professionals
Rodney Simms & Megan Meyers
Taxes & SSA
Ron Hull

- **Taxes Presentation**
  - Get an employer identification number.
    - [Apply for your IRS EIN/Federal Tax ID Number here](#)
  - You must collect a viable street address and Social Security number for Social Security taxes.

- **Employee Payment Record**
  - Contact Ron at [ron@ronhullauthor.com](mailto:ron@ronhullauthor.com) for an Excel spreadsheet and other advice

- **Unemployment Taxes**
  - Search... unemployment taxes (your state)

- **Filing W-2s/W-3s Online**
  - [https://www.ssa.gov/employer/W2checklist.htm](https://www.ssa.gov/employer/W2checklist.htm) complete by January 31 and mail to your PCAs or give to them with their copies of the W-2 (federal, state, local) with a copy of their payment record.
  - File your forms with Business Services Online (BSO). Create and login to the new Government services login procedure and follow directions...
Taxes & SSA
Ron Hull

• IRS Instructions for W-2/W-3
  • You can create the forms here and set them separately to Social Security, but it is more difficult than online at BSO.

• Filing Your 1040
  • https://www.irs.gov/filing/e-file-options
  • I file as an individual, not a business.
  • I include all payments I made to PCAs from my own funds only as a part of medical expenses for itemized deductions.
  • Do not include pay from agencies, charities, etc.
  • Then, only if your itemized deductions are greater than the standard deduction that most people claim.

• Schedule H
  • Filing the household employees schedule is the federal equivalent of unemployment taxes.
  • Both the state and federal taxes are minimal.
  • I recommend that you get a free or inexpensive provider of tax services to make it easy to file your taxes.

• If you don’t have a W-2 from an employer, you may have to file estimated taxes in advance every quarter, matching as close as possible what your taxes will be.
Care Support Working Group
Resources & Webpage

• These two resources created by information provided by the working group members based on their experiences can be found on the Advocacy Resources webpage.
  • The Best Tips and Strategies for Finding and Hiring PCAs (August 2023)
  • What We Want Our Caregivers to Know (December 2023)

• The United Spinal Association Care Support Webpage also provides care support resources and information that includes:
  • The Action Plan
  • What United Spinal is Working On
  • Action Alerts
  • Upcoming Groups and Webinars
# Working Groups

<table>
<thead>
<tr>
<th>Accessible Parking</th>
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<tr>
<td>Outdoor Access</td>
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<td>• Beach Access and Mobility</td>
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<td>• Accessible Camping</td>
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<td>• Accessible Winter Outdoor Recreation</td>
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<td>Emergency Preparedness (Ready to Roll)</td>
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<td>• Hurricane Preparedness for the Disability Community</td>
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<td>• Wildfire Emergency Preparedness</td>
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<td>• How to Keep Your Home Warm, Safe &amp; Cozy this Winter</td>
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<td>• Navigating Winter in a Wheelchair</td>
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<td>Care Support</td>
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<td>• Finding and Hiring PCAs</td>
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<td>• What We Want Our Caregivers to Know</td>
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<td>Accessible Transportation</td>
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Please fill out the online form to participate in any working groups at: [https://unitedspinal.org/working-groups/](https://unitedspinal.org/working-groups/)

All Working Group Resources can be found at: [https://unitedspinal.org/advocacy-resources/](https://unitedspinal.org/advocacy-resources/)
What Are Our Expectations?

- United Spinal wants every advocate to participate at their own pace
- United Spinal provides many opportunities to get involved
- Anyone can participate so long as they care about the issues facing people with SCI/D and wheelchair users

Become a United Spinal Registered Advocate
Grassroots Advocacy Network Registration Form:
https://unitedspinal.org/grassroots-advocacy-network/
THANK YOU!

• **Advocacy Team**
  • advocacy@unitedspinal.org
  • Steve Lieberman- Director, Advocacy & Policy
  • Annie Streit- Grassroots Advocacy Manager

• **Government Relations Team**
  • policy@unitedspinal.org
  • Alex Bennewith- Vice President, Government Relations
  • Rebecca MacTaggart- Government Relations Manager
  • Kent Keyser- Public Policy Fellow

• **Government Relations Manager**
  • Rebecca Mactaggart
  • rmactaggart@unitedspinal.org

• **Grassroots Advocacy Manager**
  • Annie Streit
  • astreit@unitedspinal.org
Additional Resources

- The Administration for Community Living (ACL)
  - [https://acl.gov/](https://acl.gov/)
- The Disability Information and Access Line (DIAL)
  - (888) 677-1199
  - [https://dial.acl.gov/home](https://dial.acl.gov/home)
- Eldercare Locator (60 years old and over)
  - (800) 677-1116
  - [https://eldercare.acl.gov/Public/Index.aspx](https://eldercare.acl.gov/Public/Index.aspx)
- Subscribe to the ACL Newsletter at:
  - [https://cloud.connect.hhs.gov/acl-subscriptionsm](https://cloud.connect.hhs.gov/acl-subscriptionsm)
# Training Care Support Professionals

## Additional Resources

### Sample Needs Assessment Work Sheet

<table>
<thead>
<tr>
<th>Need</th>
<th>Frequency</th>
<th>Time Needed</th>
<th>AM</th>
<th>PM</th>
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<tbody>
<tr>
<td><strong>ADLs</strong></td>
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<td>Bathing</td>
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<td>Dressing</td>
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<td>Grooming</td>
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<td>Eating</td>
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<td>Bowel care</td>
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<td>Bladder care</td>
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<td>Transferring</td>
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<td>Other</td>
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<td><strong>IADLs</strong></td>
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<td>Meal planning</td>
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<td>Shopping</td>
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<td>Setting on computer</td>
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<td>Setting up equipment</td>
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<td>Making bed</td>
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<td>Changing wheelchair</td>
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<td>Driving a car</td>
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<td>Feeding</td>
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<td>Medication</td>
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<td>Storing items</td>
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<td>Arranging phone</td>
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<td>Laundry</td>
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<td>Putting away items</td>
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<td>Housekeeping</td>
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<td>Pet care</td>
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<td>Other</td>
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<td><strong>Medical-Related Care</strong></td>
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<td>Pressure repositioning</td>
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<td>Mobilization</td>
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<td>Range of motion exercises</td>
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<td>Skin inspection</td>
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<td>Stomach, respiratory</td>
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<td>Other</td>
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### Sample Personal Care Checklist for Morning Routine

**Personal Care Checklist**

- Getting Ready
  - 1. Get clothes ready
  - 2. Prepare bath water
  - 3. Check bathroom temperature
  - 4. Make sure needed materials are available

**Routine**

1. Assist with bladder catheterization
2. Assist with bowel by inserting suppository and digital stimulation
3. Assist in clothing removal
4. Move from bed to bath
5. Wash and rinse body
6. Assist with hair care
7. Move from bath to dressing area
8. Dry body thoroughly
9. Conduct skin check for pressure sores
10. Apply lotion or powder
11. Apply deodorant
12. Shave
13. Assist in dressing
14. Move to wheelchair
15. Assist with teeth brushing
16. Move to breakfast area

**Clean Up**

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

Training Care Support Professionals

Additional Resources

• Some states like Wisconsin offer free training and $500 bonus when you start a job.
  • [https://www.dhs.wisconsin.gov/regulations/caregivers.htm](https://www.dhs.wisconsin.gov/regulations/caregivers.htm)

• There are online associations that offer low-cost training:
  • [https://americancaregiverassociation.org/](https://americancaregiverassociation.org/)
  • [https://professionalassociationofcaregivers.org/](https://professionalassociationofcaregivers.org/)
### Taxes & SSA

#### Additional Resources

![Tax Form Image]

**Form W-2 Wage and Tax Statement**

**2013**

*Copy D For Employer.*

**Department of the Treasury - Internal Revenue Service**

For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.
### 2023 Estimated Tax

File only if you are making a payment of estimated tax by check or money order. Mail this voucher with your check or money order payable to "United States Treasury." Write your social security number and "2023 Form 1040-ES" on your check or money order. Do not send cash. Enclose, but do not staple or attach, your payment with this voucher.

**Calendar year—Due Jan. 16, 2024**

**Amount of estimated tax you are paying by check or money order.**

| Payment Voucher | 4 |

| OMB No. 1545-0074 |

<table>
<thead>
<tr>
<th>Your first name and middle initial</th>
<th>Ronald W.</th>
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<tbody>
<tr>
<td>Your last name</td>
<td>Hull</td>
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<tr>
<td>Your social security number</td>
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**If joint payment, complete for spouse**

<table>
<thead>
<tr>
<th>Spouse’s first name and middle initial</th>
<th>Spouse’s last name</th>
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<tr>
<td>Spouse’s social security number</td>
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</tbody>
</table>

**Address (number, street, and apt. no.)**

| 11830 Spring Grove Dr. |

**City, town, or post office. If you have a foreign address, also complete spaces below.**

| Houston |

**State**

| TX |

**ZIP code**

| 77099-5025 |

**Foreign country name**

|                     |

**Foreign province/county**

|                     |

**Foreign postal code**

|                     |