

**Orientation to Consumer
Directed Personal
Assistance
(CD PA)**

A Department of Health/ Developmental
Disabilities Division - H&CBS Waiver Program



Presented in cooperation with:

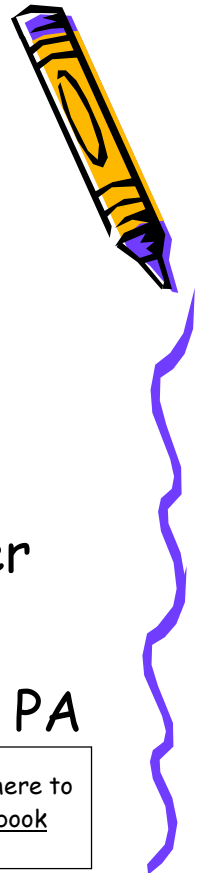
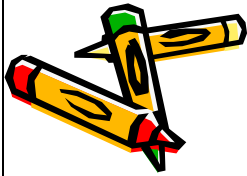
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V2.3

Welcome & Congratulations

Today you will learn about...

- Consumer Direction (CD)
- Personal Assistance (PA)
- The CD PA Option through Waiver
- How CD PA can work for you
- Your choices and options with CD PA



 This symbol tells you where to look in your Employer Handbook for more information

Self-Determination

- Another way to say *Freedom*
- A basic human *Right*
- A person has *Control and Authority* over how they will live their life and their resources (money, services, supports)
- A person has *Responsibility* for their decisions



What is Consumer Direction?

- A part of the self-determination movement.
- Focused on directing home and community based services.
- At minimum allows individuals to choose or dismiss their Personal Assistants (PA).
- Some types of consumer direction also include self-directed budgets, employer assistance, & support broker services.
- Has been around for more than 25 years, and is currently seeing new popularity.



What is Personal Assistance or PA?

- A service that pays someone to help a person do something they cannot do alone.
- Can include help with chore type work like cleaning, cooking, & shopping, or more personal things like bathing, & dressing.
- May even require special nursing skills.
- Sometimes it means doing something for a person,
- Sometimes it means doing something with a person and teaching them how to be more independent.



What is the "Waiver"?

- A Federal health program under the Medicaid system
- Also known as Medicaid Waiver, Home & Community Based Services, H&CBS, DD/MR Waiver, or simply "The Waiver"
- Offers a lot of long term care services and supports for individuals who are eligible such as:
 - Case Management
 - Adult Day Health
 - Habilitation
 - Transportation
 - Personal Assistance



How does Waiver PA work?

- Before the CD PA option, Personal Assistance (PA) services or supports under the Waiver had to be provided by a licensed Waiver Provider.
- Depending on providers you have different levels of choice over who is your worker, when they will work, and what work they will do.
- Ultimately the worker is employed by the agency and must follow their policies and practices.



 Employer Handbook page 4

How is CD PA different?

- CD PA allows you to choose almost anyone to provide Personal Assistance service or support.
- CD PA allows you to train your worker and control when they will work, and what work they will do.
- Ultimately the worker is employed byYOU!



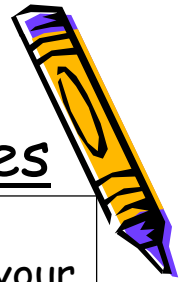
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Consumer Direction

Advantages & Disadvantages

- You have more control over your PA services
- You can hire who you want, including family or friends
- You can teach your workers yourself
- You supervise & decide if your worker is doing a good job

- You take on more responsibility for your PA services
- You have to find your own workers
- Your worker is only as good as your training
- You may have to fire your worker



What is CD PA?

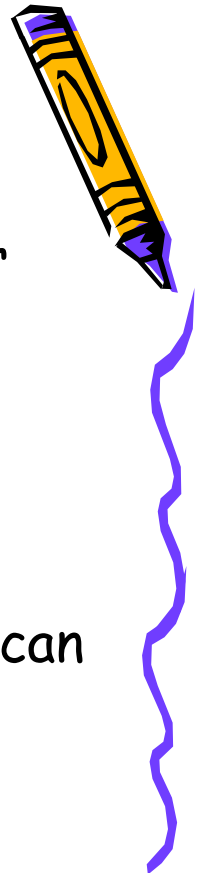
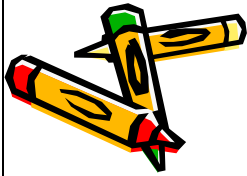
- A Waiver option made by the Department of Health/ Developmental Disabilities Division.
- A **NEW CHOICE** for how you get help with chore work and other personal assistance needs.
- A way to have **MORE CONTROL** over your worker and your services.



How does CD PA work?

--The Basics--


- You need to let your Case Manager know you are interested
- You get some special training
- You find and hire a worker
- You train and manage your worker
- You turn in papers so your worker can get paid



How do I get started?

- ✓ Meet with your Case Manager, and show how a Personal Assistant (PA) will help you meet your goals
- ✓ Decide how many hours of PA help you will need per week
- ✓ Put this need in your Individualized Support Plan (ISP)
- ✓ Decide the best way for you to meet this need:
 - CD PA
 - Agency Provider
 - Other resources in your community




 Employer Handbook page 6-7

Using Your Individualized Service Plan (ISP)

- Your ISP is your way to tell people what you need, and get authorization for services to help you.
- It is also the State's way to show how money is being spent.
- You need to follow what is in the plan or you could get into trouble.
- But...you can change the plan anytime your goals change.
- If you feel people are not listening to you when making your plan there are ways to get help.....It's in our Laws!



 Employer Handbook page 6-7

CD PA Eligibility

- Individuals must meet eligibility requirements for DOH/DDD Waiver services
- Make sure Personal Assistance services are authorized on your plan (ISP).
- Sign up for CD PA training, and learn about becoming an employer and your responsibilities.
- See if CD PA makes sense for your situation.
- Move at your own pace - Start slowly if you want and use both Agency PA and CD PA.



Become an Employer Go for it!


- Using the CD PA program to get your personal assistance means you become an employer - the BOSS.
- You are the "Employer of Record".
- You have different choices and flexibility.
- You have different responsibilities.
- You are not alone, some help is already built into the program.



New Roles in CD PA

- **Consumer** - this is the person who uses the Personal Assistance (PA) services.
- **Designated Representative** - this is a person, chosen by the consumer, to help the consumer make decisions on PA services. Consumers do not have to use a Designated Representative.
- **Employer** - this is the person who hires, supervises, trains, schedules, collects timesheets, and fires the Personal Assistant. Depending on who makes decisions this can be the Consumer or the Designated Representative or usually BOTH.



 Employer Handbook page 5-6

Support Roles in CD PA

- **Consumer/Employer Trainer** - this is the person who helps you learn about using CD PA services, where you will send your time sheets, and who to call if you need help down the road.
- **Fiscal Agent** - this is an organization that will deal with cutting paychecks, taking out taxes, and sending out tax information to your worker at the end of the year. You cannot contact them directly.
- **Case Manager** - may help you to understand CD PA, but they cannot make decisions for you.
- **DOH/DDD** - oversees the CD PA program, authorizes services, provides training, and monitors overall quality.

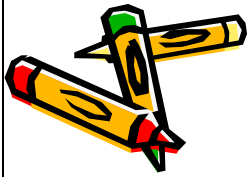


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You have a plan...now what?

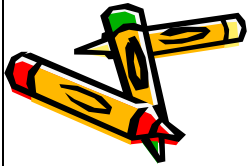
Next you will need to:

- ✓ Write a Job Description
- ✓ Find and Interview Workers
- ✓ Do Background & Reference checks
- ✓ Make a Decision and Hire someone
- ✓ Turn in the necessary paperwork



Writing the Job Description

- Employment Contract - This will become a contract between your worker and you.
- This must match your Individualized Support Plan (ISP) goal.
- Think it through!
- The best job descriptions will make it clear what you want your worker to do, and if your worker is doing a good job.
- You may need to compromise some things with the worker you want to hire.
- Use the sample to help you.



 Employer Handbook page 7-9

Know Your Levels of PA

- Depending on your goals and needs, you will be authorized a certain level of Personal Assistance (PA) service.
- The PA level puts some restrictions on what the PA worker can do and cannot do.
- You may be authorized for some PA work at one level and some PA work at another level at the same time.
- One level (PA2) requires a Registered Nurse (RN) to oversee the PA worker. If needed, this will be provided by DOH.



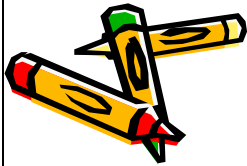
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Sample Job Description

Be as detailed and specific as possible.

Should include:

- Who is the supervisor. (Boss)
- When the job is. (Days, Times)
- What the worker will do and how they will do it. (Assignments, Tasks)
- What qualifications the worker needs to have. (Experience, Knowledge)
- Legal information from "sample" in handbook. (Disclaimers, Protections)



 Employer Handbook page 27-28



Finding a PA

- Many different ways to find someone who wants to be a Personal Assistant (PA)
- Almost anyone can be a PA
- A few people cannot be your PA under the CD PA policies
 - Yourself
 - Your Designated Representative
 - Your Parent if you (consumer) are under 18 years of age
 - Your spouse
 - Anyone under age 18

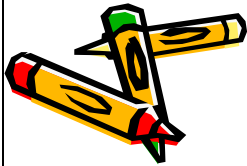


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Get the Word Out!

- Advertising - Free!!!
 - ☞ Word of mouth - tell people you know
 - ☞ Post a flyer - library, church, park
 - ☞ College students
 - ☞ Local publications
- Advertising - You Pay\$\$
 - ☞ Major and Local Newspapers
 - ☞ Internet



☞ Employer Handbook page 9-10

Hiring someone you know

- Be careful - Business & Friendship don't always mix well.

ADVANTAGES

- You already know each other
- They already know what you like
- They are already involved in your life
- Their schedule may already match yours

DISADVANTAGES

- You may have to give them criticism or fire them
- They may have trouble taking orders from a friend or family member
- You may lose an unpaid support or a friend



☞ Employer Handbook page 9-10

Interviewing Applicants

You should interview everyone the same way, even if you already know them.

- **Phone screening**

- A good way to find out a little before you actually meet the person
- Have your questions ready from the job description
- Take notes
- Don't share things like your address or other personal information
- Use the phone screening to narrow down applicants



 [Employer Handbook page 10-12](#)

Interviewing Applicants

You should interview everyone the same way, even if you already know them.

- **Face to Face Meeting**

- This is on your terms
 - Public location is good
 - Have someone you trust join you
- Get all the important information (Application!!)
- Have your questions ready and be specific
- Take notes
- Ask them how they would do the job and have them show you they can do it
- Don't make any decisions right then, you can always call them back



 [Employer Handbook page 10-12](#)

Interviewing Tips

Get the most out of your interview time:

- Greet the person and make them comfortable
- Follow the job description
 - Stick to skills, qualifications, and job duties
- Ask open ended questions, get them to talk
- Take notes, you will not remember everything
- See if they have any questions
- Thank them for their time
- Make your decision later & let them know when they will hear from you



 Employer Handbook page 10-12

Background Checks

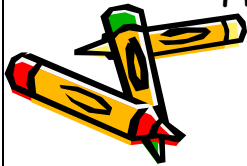
- Criminal Conviction Record Check
 - Only do this for people you really want to hire.
 - You will need to pay for this or require your applicant to pay for this. Cost is \$10.00 in person, or \$15.00 by mail per name you submit.
 - You can waive this requirement but it is not recommended.
 - You can decide what to do with the results.
 - Should let people know up front that you will be doing this.
 - Handbook has forms to use.



 Employer Handbook page 12

Background Checks

- Reference Checks
 - Again only do this for people you really want to hire.
 - Highly recommended to have at least two per applicant.
 - Can be done over the phone (easiest) or by mail (takes longer and does not always get a response).
 - You can decide what to do with the results.
 - Should let people know up front that you will be doing this.
 - Handbook has sample questions you can ask.



 [Employer Handbook page 12](#)

Deciding to Hire a Worker

Or NOT

- You're the boss if no one matches your needs -- start over
- Be confident and patient
- Don't put yourself in a bad situation
- You can always ask more questions or have a second interview



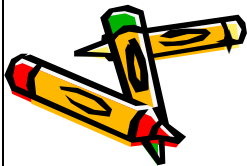
 [Employer Handbook page 13-19](#)

Deciding to Hire a Worker



The Employment Contract:

- Same as the Job Description
 - Go over every item and be sure there is agreement
- Some compromise may be necessary if you have someone you really like
- Set a schedule
- Set ground rules and expectations up front - don't make assumptions
- Tell them the benefits
 - ✦ Pay rate - NOT NEGOTIABLE
 - ✦ Worker's Compensation - NOT AVAILABLE
 - ✦ Health Coverage & General Liability - NOT AVAILABLE THROUGH DOH
 - ✦ Automobile Insurance - May need to adjust coverage



 Employer Handbook page 13-19

Deciding to Hire a Worker



The Offer of Employment:

- This is not final until the background checks are done and all the paperwork is signed.
- Turn in your paperwork to the Consumer Direction Specialist.
 - Consumer/Employer Packet - completed by you
 - Employee Packet - completed by worker

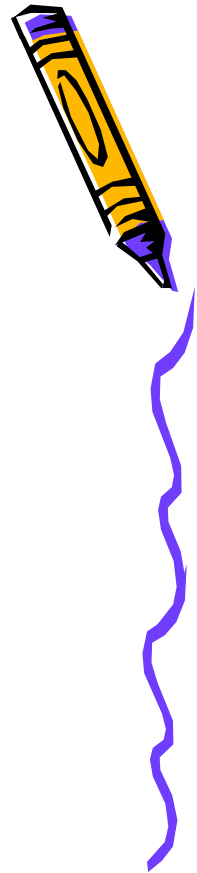
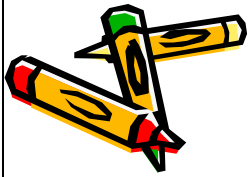


 Employer Handbook page 13-19

Help Your PA Get Started

TRAINING/TEACHING:

- ✓ Your style and preferences
- ✓ How to do the job
- ✓ Schedule & Paperwork
- ✓ Safety & Emergencies
- ✓ Lifting & Assisting
- ✓ Behavioral & Emotional Support



Your Style and Preferences

- Remember you're the boss
- Be a good boss or your workers will quit
- Help your worker to be comfortable and happy
- Teach your worker how you like things done - give them choices when possible
- Tell them how to communicate with you
- Tell them the schedule you expect
- Tell them how to do each part of the job - Be patient, it may take a little time



 Employer Handbook page 15-17

Give Your Worker Feedback

- Nobody likes this part, but it has to be done - Start right away (1st Day)
- Feedback is praise and correction
- Should be more praise than correction
- Correction should teach your worker how to do it right, not make them feel dumb
- Feedback goes both ways - Listen to your worker and their feelings
- May have to say things more than once, sometimes people forget



 Employer Handbook page 15-17

Prepare Your Worker

- Plan ahead/ make sure your worker knows:
 - Emergency procedures
 - Safety concerns/ Medical conditions
 - How to lift & assist you
 - Confidentiality- what not to say
 - Your behavior and emotional support needs
 - Any changes in schedule, or job duties



 Employer Handbook page 15-17

Problems with Your Worker

Small or progressive problems:

- Poor performance
- Poor attitude
- Difference in personal styles or preference

Suggested approach:

- Give your worker feedback
- Let them know what you expect and by when
- Let them know the consequences if they do not change
- Do not compromise your own health or safety



 Employer Handbook page 15-17

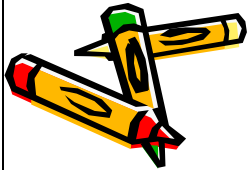
Problems with Your Worker

Large or immediate problems:

- Abuse or Neglect
- Illegal Activity
- Theft

Suggested approach:

- Take care of your own health and safety first
- May need to call 911, Adult Protective Services, and/or your case manager
- Probably need to dismiss your worker
- Have someone you trust with you when confronting your worker



 Employer Handbook page 15-17

Keep Your Worker Happy

It takes a lot of work to find and train a good worker, so take care of them.

- Make sure they get paid - send in your paperwork
- Praise them and thank them often
- Give them some choice and control, they like it too
- Give them feedback right away, they want to do good job



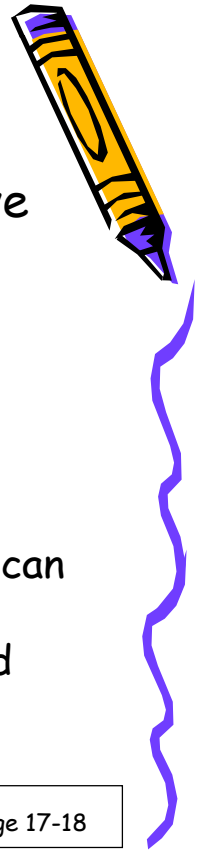
Have a Backup Plan


Even the best workers can get sick or have emergencies, so be prepared:

- Plan out what you will do and how you will do it because this will happen

Some ideas to help you plan:

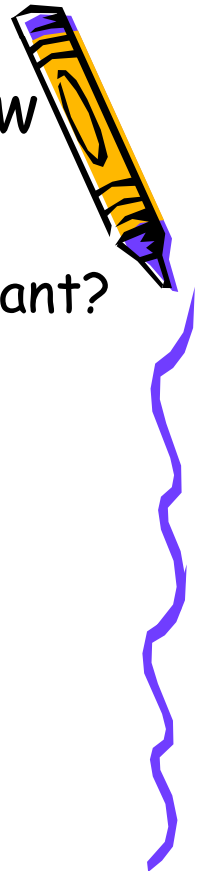
- Use more than one worker, so you always have someone trained and ready
- Have a family member, friend or neighbor you can call on (let them know you can pay them)
- Talk with local agencies to see if they can send out a worker



 Employer Handbook page 17-18

Other Things You Should Know

- ✓ What is a Fiscal Agent?
- ✓ Why are Authorized Hours important?
- ✓ How do I change things?
- ✓ What is Fraud?
- ✓ Who can you call for Help?
- ✓ What are your Rights?
- ✓ What are your worker's Rights?




What is a Fiscal Agent?

A company or organization that helps process paychecks and deal with taxes and other employment requirements.

- For CD PA it is Department of Human Services (DHS)
- They will write the check for your worker
- They will take out the necessary taxes, and send out tax information at the end of the year
- You cannot contact them directly
- You need to go through your Case Manager



 Employer Handbook page 6

Why are Authorized Hours important?

AUTHORIZED HOURS are how many hours of PA services have been approved through your Case Manager.

- This is the amount of hours your worker will get paid for working.
- You have to make sure your worker does not go over this amount of hours
- There is no overtime (OT) pay authorized
- If you do go over, your worker might not get paid
- Talk to your Case Manager ahead of time if you think you need more hours




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How do I Change Things?

VERY IMPORTANT to let your Case Manager know if anything changes, including:

- If your worker changes, or you add a worker
- If your goals change or the type of work your Personal Assistant (PA) does changes
- If you need more or less PA help
- And be sure to let your PA know too



 [Employer Handbook](#) page 21-22



What is Fraud?

FRAUD is when you knowingly lie to get money - this is a crime!

- In CD PA this could be lying on time sheets about the hours worked or lying about who is getting paid
- You can get in serious trouble and lose some or all of your services
- You could have to pay back the money
- DON'T DO IT - call the CD PA support if you are not sure



Who can you call for Help?

CD PA is designed with lots of support, use it whenever you need it.

- Designated Representative - this is someone who you choose to help you make decisions, you should talk with them first
- CD PA Specialist - this is a designated staff who can help you with questions about CD PA and how it works
- Your Case Manager - they will still be there and you can always call them with questions
- Family & Friends - tell them what you are doing - they may be able to help in many different ways



What are Your Rights?

Rights allow you to pursue the best life you can imagine, you have all the rights given to a US citizen, some examples are:

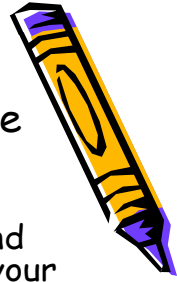
- Safety - be free from abuse and neglect.
- Choice - the right to choose, and have choices to choose from.
- Relationships - have and seek out relationships.
- Contribution & Community - the opportunity to contribute and participate in your community.
- Responsibilities - have responsibility for decisions and actions.
- Control - have the power to make decisions and control your services.
- Dreaming - have hopes and dreams.
- Dignity & Respect - to be treated with dignity and respect.



Your Worker's Rights

Your Worker has the same rights as you, here are some ways they can help you with your rights:

- Choice - respect and encourage your choices.
- Relationships - help you foster positive relationships, and support you to strengthen and develop relationships in your community.
- Contribution & Community - believe everyone is an important member of the community, teach the community this too.
- Roles and Responsibilities - help you to be independent whenever possible, protect you from harm, but not from learning.
- Control - your happiness is their measure of success.
- Respect & Dignity - respect your worker and be sure the respect you and your family.
- "Can Do" Attitude - don't say it can't be done, seek individual solutions to barriers.



CD PA- Is it right for you?

- Only you can decide, but you know best
- It can seem overwhelming at first but you will learn it quickly and be up and running in no time
- You can take it slow, you can use both Agency PA and CD PA at the same time
- Stay informed - CD PA is likely to change over time



Have more Questions?

Contact:



UH - Center on Disability Studies:

Sandy Kofel (808) 956-5827

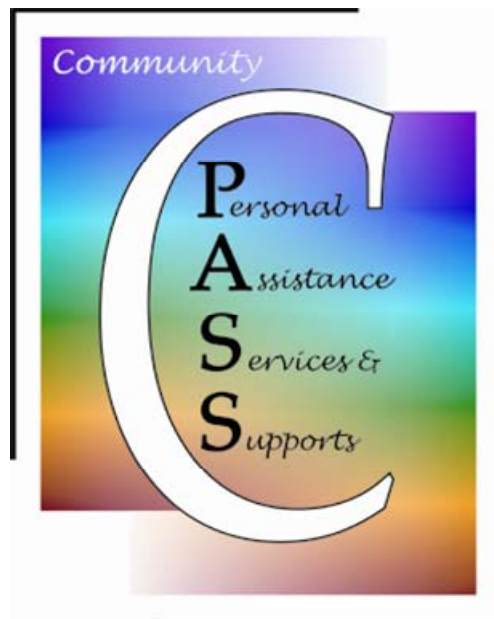
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Or your Case Manager!



MAHALO