
Section 4

PLANNING AND ORGANIZING ATTENDANT SERVICES

4.1 Determining Your Attendant Needs

Before you begin recruiting attendants, be clear about your needs. Careful planning in the beginning will be a BIG help, saving you time and frustration later.

4.1.1 Attendant Tasks

Decide what your attendant/s will do. Develop a "tasks" checklist, noting how often these tasks must be performed. Your checklist will help you determine how many hours per day, week, and month you require attendant support. Remember, a checklist can assist you in two ways: it can ensure you have listed everything that needs to be done and it is an excellent tool when you are talking with potential attendants. Use the "Sample Attendant Support Tasks Check List" below to help you build your tasks checklist.

Sample Attendant Support Tasks Check List:

- Getting up – What is involved; how long does it take?
- Going to Bed - What is involved; how long does it take?
- Transferring – How often and with what equipment?
- Night Assistance - When and how long?
- Bathing - Special needs?
- Dressing - How much assistance is needed?
- Bladder and Bowel Care - Use of Equipment? What time of day? How many times each day?
- Grooming - Any special requirements? (nails, hair, shaving etc.)
- Exercise Routine - Type and how often?
- Eating - How much assistance is needed?
- House cleaning – Specific needs and how often?
- Shopping – When and how much time is involved? How often? (weekly, bi-weekly etc.)
- Laundry/ironing - Time involved?
- Meal Preparation – How often, what time of day, what is involved?
- Maintenance of equipment – How much, what type and how often?
- External maintenance - What is involved?
- Other household tasks – What and how often?

In Appendix 4-1, "Sample Documents and Forms," is a task checklist for giving a bed bath. This is another example of a way to build task checklists.

4.1.2 Number of Attendants

Decide how many attendants you need. One attendant can provide all of your care most of the time. Having only one attendant makes some of the hiring process easier. On the other hand, hiring more workers has certain advantages. One attendant doing all the work will be more likely to burn out. With several attendants, you have more choices in scheduling, and you have more options for back-up and emergencies. Using several people will make changing attendants less of a hassle.

4.1.3 Job Description

A well-written job description will help you when screening and interviewing people. You want to make sure that your potential attendants are comfortable with all aspects of the job. Also, list in the job description the skills and experience you want attendants to have. State other capabilities you want in attendants, such as physical strength, cooking, etc. You can find a sample job description for an attendant in Appendix 4-1, "Sample Documents and Forms," but feel free to make up one that fits your needs.

A good job description can:

- Help you to be clear about your needs
- Be used as the basis for your ads for attendant workers
- Provide applicants with a true picture of your limitations and lifestyle
- Help you and applicants ask careful questions during the interview
- Serve as a checklist of duties and responsibilities for your attendants
- Be used as a tool in your evaluation of attendants' work
- Help solve disagreements between you and attendants about their duties

4.1.4 Nondiscrimination

You can have strong feelings about the characteristics (age, gender, race) you seek in an attendant. However, federal labor law prohibits you from discriminating. Be sure your job descriptions and other hiring materials reflect this nondiscrimination policy. See Appendix 4-2, "Avoiding Discrimination," for more on this subject.

4.1.5 Attendant Guidelines

Some of your attendants' habits and behaviors might annoy you. To address this ahead of time, develop a list of guidelines that you expect attendants to follow and have this list ready to share with applicants you want to hire. Think carefully before deciding to hire someone who has problems with your guidelines. This could lead to problems later on.

Give a lot of thought to the issue of confidentiality. It is likely your attendants will learn a lot about your personal life. Be clear that your

personal life and business stays private. You will trust your attendant with many personal issues. Be clear about how you expect your attendant to handle that trust.

Think about the following questions as you write up your attendant guidelines:

- How will you deal with an attendant who is late?
- How and when should an attendant let you know when he will be absent?
- When is it okay for an attendant to use your personal property?
- Can an attendant have visitors in your home? When? How often? How long?
- How should an attendant relate to others who live in your home? Should the attendant take direction from them? When? Under what circumstances?
- How should an attendant behave during your social activities?
- Will having friends or family as attendants lead to relationship problems?
- On what grounds might you terminate an attendant's employment with you?

Some actions by an attendant will give you grounds for immediate termination. In your guidelines, talk about grounds for immediate termination for actions such as:

- Coming to work under the influence of drugs or alcohol
- Stealing from you
- Abusing you in any way (physically, verbally or psychologically)

We address more about these issues later in Section 6 of this manual.

4.2 Developing an Attendant Support Management Plan

The Attendant Support Management Plan is a written document describing how you will manage your attendant support while participating in CDAS. The CDAS Program Administrator must approve your Plan before you can enroll in CDAS. Your Plan *MUST CONTAIN*:

- Information about your disability and health
- A description of your needs for attendant support and other services
- How you will get the attendant support you need

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- Whether you will need attendants to perform health maintenance activities and whether you have received adequate instructions on those procedures
 - Whether you are able to train your attendants to perform the health maintenance activities you need
 - How you will handle emergencies related to your attendant care
 - A description of how you will use the Fund for Additional Services (FAS), discussed in Section 5.4

Your Plan should have sufficient detail so the Program Administrator can assess your ability to manage your attendant care. For a sample completed plan, see Appendix 4-1, Sample Documents and Forms.

Your Plan is a very important document, so take time and care in developing it. Review it regularly and make any changes when the need arises. If changes are necessary, do not forget to forward your new Plan to the Program Administrator for review and approval. It is important to remember that the attendant support services are available only for your benefit.

4.3 Directing Attendants in Health Maintenance Activities

Health Maintenance Activities are routine daily activities another person must complete for you so that you can stay in good health. They are health-related activities that you would do yourself if you were able. Some of these activities are:

- Caring for a catheter
- Monitoring a ventilator
- Giving medications
- Caring for a minor wound or injury

If you will be directing attendants to perform health maintenance activities, you must list those activities in your Plan and train them how to do these activities. If you decide you should not be the one who trains them, then you must include in your Plan what you intend to do to make sure your attendants are trained and capable of performing such health maintenance activities.

Section 4 Quiz:

PLANNING AND ORGANIZING ATTENDANT SERVICES

Answer questions 1- 4 answer using TRUE or FALSE.

1. True or False: Before you begin recruiting, you should develop a "tasks" checklist noting how often these tasks must be performed. Your checklist will help you determine how many hours per day, week and/ or month you need attendant support. (Answer: page 4-1)
2. True or False: You are responsible for deciding how many attendants you need. One attendant can provide all of your care most of the time. However, hiring more workers has certain advantages. One attendant doing all of the work is more likely to burn out. With several attendants, you have more choices in scheduling, and you have more options for back-ups and emergencies. (Answer: page 4-2)
3. True or False: You can have strong feelings about the characteristics (age, gender, race) you seek in an attendant. However, you are prohibited from discriminating. (Answer: page 4-3)
4. True or False: If you direct attendants to perform health maintenance activities, you must list those activities in your Plan and train your attendants how to do these activities. If you have decided you are unable to train the attendant, then you must include in your Plan what you intend to do to make sure your attendants are trained and capable of performing such health maintenance activities. (Answer: page 4-5)

Answer question 5 using Multiple Choice.

5. The Attendant Support Management Plan is a written document describing how you will manage your attendant support while in CDAS. Your Plan should have sufficient detail so the Program Administrator can assess your ability to manage your attendant care. Your Plan **MUST CONTAIN** which of the following: (Answer: page 4-4)
 - A. Information about your disability and health
 - B. A description of your needs for attendant support and other services
 - C. How you will get the attendant support you need

- D. Whether you will need attendants to perform health maintenance activities and whether you have received adequate instruction on these procedures
- E. Whether you are able to train your attendants to perform the health maintenance activities you need
- F. How you will handle emergencies related to your attendant care
- G. A description of how you will use your FAS
- H. All of the above items must be contained in your Plan

Section 4 Quiz: Answer Key

PLANNING AND ORGANIZING ATTENDANT SERVICES

1. **True:** Before you begin recruiting, you should develop a “tasks” checklist noting how often these tasks must be done. Your checklist will help you to determine how many hours per day, week and/ or month you need attendant support. (Answer: page 4-1)
2. **True:** You are responsible for deciding how many attendants you need. One attendant can provide all of your care most of the time. However, hiring more workers has certain advantages. One attendant who is doing all of the work is more likely to burn out. With several attendants, you have more choices in scheduling, and you have more options for back-ups and emergencies. (Answer: page 4-2)
3. **True:** You can have strong feelings about the type of attendant you want to hire regarding age, gender, or race. However, you are prohibited from discriminating. (Answer: page 4-3)
4. **True:** If you direct attendants to perform health maintenance activities, you must list those activities in your Plan and you are to train your attendants how to do these activities. If you have decided you are unable to train the attendant, then you must include in your Plan what you intend to do to get your attendant trained. (Answer: page 4-5)
5. The Attendant Support Management Plan is a written document describing how you will manage your attendant support while in CDAS. Your plan should have sufficient detail so the Program Administrator can assess your ability to manage your attendant care. Your Plan **MUST CONTAIN** which of the following: (Answer: Section 4-2): **H**

APPENDIX 4-1
SAMPLE DOCUMENTS AND FORMS

GIVING A BED BATH

(Sample Checklist)

- 1. Explain what will be done and the reasons for the various techniques.
- 2. Place a cover over the top bedcover to be used as a bath blanket. Sew several large towels together to make a bath blanket. Slide the top covers from under the bath blanket. Help remove bedclothes as needed.
- 3. Place a towel under the person's head.
- 4. With washcloth, make a bath mitt by wrapping washcloth around fingers and palm, anchoring it with the thumb; fold over the part extending beyond the fingers and tuck under at the bottom edge of the cloth at the palm. (This eliminates dangling ends, which can be uncomfortable to the person.)
- 5. Wash eyes with clear water, cleansing from outer corner of the eye to the inner part of the eye (as the normal flow of tears is from the outer to the inner part of the eyes), using opposite corners of the cloth for each eye.
- 6. Wash the face from the midline outward using a firm but gentle motion, using clear water for the face unless the skin is oily (some people prefer creams for cleansing); wipe from the outer to inner part around eyes.
- 7. Wash, rinse and dry ears.
- 8. Place towel under arm and another towel near the hand to set the basin on.
- 9. Lower person's hand into basin; allow it to soak as the arm is being washed.
- 10. Wash and rinse the other arm and soak hand, drying carefully, especially between the fingers. Push cuticle back and clean under the nails. File nails as needed.
- 11. Put towel over chest and abdomen; bring bath cover down to the thighs.
- 12. Wash, rinse and dry neck, chest and abdomen. Cover chest and abdomen. If the person has an ostomy (a surgery opening into colon), the attendant will need to give careful attention to care of the skin around it.
- 13. Remove bath cover to expose the leg and place towel under the leg.

- 14. Place a towel under the basin placed near the foot.
- 15. Lower foot into basin to soak; this helps soften the nails and skin, and it feels nice.
- 16. Wash, rinse and dry leg.
- 17. Repeat above steps with other leg.
- 18. Dry carefully between each toe.
- 19. Check feet. Use pumice stone/emery board to smooth calluses. Clean under the nails.
- 20. Turn the person on side; drape towel around the back and buttocks.
- 21. Tuck the towel along under buttocks and shoulders.
- 22. Wash, rinse and dry back and buttocks; cover back.
- 23. Place towel under buttocks. Teach attendant to wash carefully between buttocks and genitals. Rinse and dry thoroughly. Remind female to wash from front to the back to avoid bringing germs from rectal area to vagina and bladder. For male, if unable to wash buttocks and genitals, the aide should complete this part of the bath for him. Also, if person has urinary catheter, he should be taught to wash carefully around catheter with soap and water and dry area well.
- 24. Apply body lotion or powder, as desired.

**CONSUMER DIRECTED ATTENDANT SUPPORT (CDAS) PROGRAM
ATTENDANT SUPPORT MANAGEMENT PLAN**

Name: Pat Publican

Medicaid ID #: A1234567

Address: 123 Consumer St, Apt 101

City: Self Directed **Zip:** 80256

Phone: 303-987-6543

Email: ppub@cdas.yes

Case Manager: John Doe

Waiver: HCBS- EBD

PART ONE—Health and Disability Status (Training Reference Manual, Section 4)

1. I would describe my current disability as follows (describe in detail):

I have a degenerative neuromuscular disease that greatly affects my mobility

I am a severe quadriplegic, needing assistance with daily living tasks such as

Bathing, cooking and eating, dressing and grooming. I use an electric

wheelchair. I am also insulin dependant.

2. I would describe my current health as follows (describe in detail):

With constant attention to my body and health maintenance, I am generally

In stable health. My last major health incident that involved hospitalization

was 13 months ago.

3. I need attendants to perform health maintenance (sometimes called "skilled") activities.

YES NO

If "YES," describe: I need assistance to complete a bowel program 1 to

2 times daily. I require assistance with a catheter change once a month.

I also need assistance giving insulin shots two times daily.

PART ONE – continued

4. PP (Initial). I certify that I have received adequate instruction on the health maintenance activities described in Item 3 above, from:

Beatrice Ratchett

Occupational Therapist

Name

Type of Health

5. PP (Initial). I certify that I am qualified and able to train my attendant/s to perform the health maintenance activities I need.

6. PP (Initial). I certify that I will train my attendant/s to perform for me the health maintenance activities described in Item 3 (above).

OR

(Initial only one in Item 6)

_____ (Initial). I certify that I will have my attendant/s trained by a competent health professional to perform for me the health maintenance activities described in Item 3 (above).

PART TWO – Attendant Support (Training Reference Manual, Section 4.1.1)

7. **The attendant support I need (“skilled” and “unskilled”) is (*what and how often*) (you can attach lists):**

Task: Bowel Program **How Often:** Daily 1-2 times

Task: Getting in and out of bed **How Often:** Daily, 2 times

Task: Dressing and undressing **How Often:** Daily, 2 times

Task: Bathing entire body **How Often:** Daily, 1 time

Task: Catheter Change **How Often:** Monthly, 1 time

Task: Grooming: hair, teeth, nails, skin **How Often:** Daily, 2 times

Task: Food preparation and eating **How Often:** Daily, 3- 4 times

Task: Insulin maintenance **How Often:** Daily, 2 times

Task: _____ **How Often:** _____

PART TWO — (continued)

8. The steps I am taking to find and hire attendant support are (describe in detail):

I have let my current attendants know I am interested in continuing to work with them while in CDAS. I am planning on posting ads with several local community centers and churches. I have notified my friends and family I am interested in hiring them for CDAS. I am also going to contact a local nursing school to let them know of this opportunity I have.

9. The steps I am taking regarding emergency and/or unexpected situations are:

I am planning on hiring 3 "stand-by" attendants for short notice/emergency care. I have budgeted for a small monetary incentive for attendants during emergency times. I am planning on hiring my friend John as one of my "Stand-by" attendants. I will pay him \$2.00 more per hour than the shift he is covering. I will continue to build a pool of potential backup attendants.

PART THREE -- Budgeting (Training Reference Manual, Section 5)

Complete the following Worksheet (If you wish you can attach a separate sheet detailing hours, times, and notes, etc. to show the total cost of your care).

10. CDAS Monthly Budgeting Worksheet

Your Monthly Allocation	=	\$2,987.00
Minus (-) 12% ISO Fee	-	\$358.44
Equals (=) Your total amount available for attendant support services. This includes skilled (nursing and CNA) services and non-skilled (personal and homemaker) services.	=	\$2,628.56 (1)

11. CDAS Monthly Budgeting Worksheet, Continued

Total #1 (From Previous Page)					\$2,628.56 (1)
Total available for attendant support services.					
Name of Attendant	Rate of Pay Per Hour	Your Cost Per Hour **	X	Hours Per Week	Amount Per Week
Bob	\$11.00	\$12.88	X	15	\$193.20 (a)
Sara	\$11.00	\$12.88	X	18	\$231.84 (b)
Tony (LPN)	\$18.00	\$21.08	X	7	\$147.56 (c)
			X		(d)
			X		(e)
Amount Per Week Total Add (+) (a) through (e)					\$572.60 (2)
Amount Per Month Total Multiply "Amount Per Week Total" (2) by 4.3 to determine the cost for your attendant support services per month. This amount equals (3).					\$2,462.18 (3)
Subtract Total 3 from Total 1 to determine amount available for background checks and emergency/back up care if any. This amount equals (=) Total 4					\$2,628.56 (1)
					\$2,462.18 (3)
					\$166.38 (4)
Amount Available for Emergency Backup & CBI: (4)					\$166.38 (4)
Amount Budgeted for Emergency Back Up Care: (5)					\$50.00 (5)
Amount Budgeted for CBI Checks (4 checks x \$6.85 each): (6)					\$27.40 (6)
Total Budgeted for Emergency Backup & CBI Add (5) plus (6) equals (7)					\$77.40 (7)
Monthly Savings Subtract (4) minus (7) equals monthly "savings", if any. (8)					\$88.98 (8)
Fund For Additional Services – Multiply Monthly Savings (8) x .50					\$44.49 (9)



12. I plan to use the FAS fund for:

I plan to buy two devices that would facilitate my computer usage:
1) a 2-way Sip & Puff switch with goose mount; and 2) additional
computer memory to facilitate the Sip & Puff processing.

** Amount taken from the "Show Me the Money Table"

PART FOUR – CDAS Start Date (1st or 16th of month)

2-16-05

3-1-05

Preferred CDAS Start Date

Alternate CDAS Start Date

PART FIVE – Signature

Pat Pylean

2/1/05

Participant Signature

Date Signed

FOR CDAS STAFF USE ONLY – PLEASE DO NOT WRITE IN THIS SPACE

CDAS Administrator Approval

Date Signed

Sample Hiring Agreement

Chris agrees to provide attendant support to Kelly on the following terms.

A. Wages

1. Chris will begin work at \$9.50 an hour.
2. After 3 months of satisfactory work, Chris will receive a \$1.00/hr raise.
3. Kelly and Chris will discuss further wage increases every 6 months.

B. Benefits

4. Health – Health Insurance is available through the ISO.
5. Days off – Chris can have days off if he gives Kelly a week's advance notice before taking off. (CDAS is unable to pay wages for days off)

C. Services

Chris will perform the following services:

6. Get Kelly up and out of bed.
7. Give Kelly a shower or bath, based on Kelly's preference that day.
8. Assist Kelly with grooming and dressing.
9. Prepare Kelly's breakfast and lunch for Kelly to have later.
10. Wash dishes every other visit.
11. Perform other light housekeeping as requested by Kelly.
12. Assist Kelly with toileting as necessary.
13. Assist Kelly with medications as necessary.
14. Check Kelly's skin condition, as requested by Kelly.

D. Work schedule

15. Chris will work for Kelly Monday through Thursday from 6:00 a.m. until 8:30 a.m. beginning on November 4.
16. Chris will work Saturday and Sunday mornings, 7:30 to 10:00, every other weekend, beginning on November 2.
17. If Kelly needs to make a change in the schedule, she and Chris will discuss the change at least 24 hours in advance.

E. Dependability

18. Chris will be ready to work at the agreed time.
19. If Chris needs to be absent for any reason, he will give Kelly a minimum of 48 hours notice for Kelly to make other arrangements.
20. Late for work
 - If Chris is more than 15 minutes late, Kelly will call to check on Chris.
 - If Chris is frequently late, Kelly will dismiss Chris.

21. Failure to show for work
 - If Chris fails to show up once without notice, any wage increase can be postponed.
 - If Chris fails to show up more than twice without notice, Kelly will dismiss Chris.

F. Taking Responsibility

22. Chris will be observant, motivated, self-starting and pay attention to details.
23. Chris will not leave work unfinished or for someone else to do.

G. Working Independently

24. Kelly will trust Chris to do the work unsupervised after the first month. This means Kelly does not want to have to be with Chris every minute.
25. Although Kelly enjoys visiting, job responsibilities take priority.

H. Health – Sanitation – Hygiene

26. Kelly's good health begins with cleanliness.
 - Chris will wash his hands with soap before handling kitchen items and preparing food and after using the toilet (includes assisting Kelly).
 - Chris will inspect dishes and utensils when loading and unloading dishwasher.
27. Chris will not smoke in Kelly's apartment.

I. Privacy

28. What Chris sees and hears while working a shift is considered confidential, and Chris will treat it as such.
29. Chris will be considerate of Kelly's personal items and business.
30. Chris is welcome to fix and eat breakfast with Kelly and use Kelly's food if Chris chooses to do so.
31. If Chris takes anything of Kelly's without permission, Kelly will dismiss Chris.

J. Evaluation

32. Kelly and Chris will evaluate Chris' work at the end of each week during the first month.
33. Kelly and Chris will evaluate Chris' work once every 3 months after the first month.

I understand and agree to work as an attendant on the above terms.

Attendant Name _____ Date _____

I agree to employ this person as an attendant on the above terms.

Participant Name _____ Date_____.

SAMPLE JOB DESCRIPTION – PERSONAL ATTENDANT

DUTIES:

The person in this position will assist with activities of daily living. The employer is a 25 year-old man who has a physical disability, lives in his own apartment and uses a wheelchair. Specific activities include assistance with bathing, dressing, personal hygiene, toileting (includes bowel and bladder care), eating, transferring to and from the wheelchair, taking medications and range of motion exercises. The position also involves meal preparation, housekeeping, shopping, laundry and other household chores. The position requires valid Colorado driver's license, as the attendant will drive the employer's adapted van occasionally.

EDUCATION AND EXPERIENCE:

Nothing specific is required, though some experience providing attendant services in the home of a person with a disability is helpful.

SALARY RANGE:

\$9.50 to \$11.50 an hour depending upon experience.

BENEFITS:

Health insurance and worker's compensation are available.

HOURS:

2 hours a day in the early morning, typically 6:00 to 8:00 a.m., and some weekend hours.

OTHER REQUIREMENTS:

The person selected should be prompt. Reliable and able to work independently and have good personal hygiene. The person selected must submit to a criminal background check.

Attendant Evaluation Form (Sample)

Attendant's Name: _____

Date _____

Attendance

1. Does the attendant report to work when scheduled?

Always	Usually	Sometimes	Rarely	Never
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2. When the attendant is late or absent, does he or she give enough notice?

Always	Usually	Sometimes	Rarely	Never
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3. Does he or she give a good reason for being late or absent?

Always	Usually	Sometimes	Rarely	Never
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PERFORMANCE

4. Does the attendant do the work to my satisfaction?

Always	Usually	Sometimes	Rarely	Never
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5. Does the attendant follow my instructions well?

Always	Usually	Sometimes	Rarely	Never
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6. How would I rate the attendant on the following tasks?

Bathing (dressing, etc. The list will be unique to your situation.)

Great	Very Good	OK	Not so good	Poor
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7. How much supervision does the attendant need for the following tasks?

Giving medication (shopping, etc. The list will be unique to your situation.)

Nearly None	Very Little	Some	Lots	Total
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NEXT STEPS

8. Does the attendant need more training?

No Yes. In what areas? (List)

9. Does the attendant need to make changes in his/her performance?

No Yes. In what areas? (List. For example: showing up on time)

10. Does there need to be changes in the "Attendant Procedures"

No Yes. In what areas? (List. For example: Scheduling, tasks, etc.)

Date of next evaluation _____

Comments:

APPENDIX 4-2
AVOIDING DISCRIMINATION

It Can Be Discriminatory to Ask...

- About arrests.
- For U. S. citizenship.
- About children, number of, names, ages, child care arrangements or marital status.
- General questions about disabilities or physical conditions which do not relate to applicant's fitness to perform job.
- "ARE YOU SINGLE, MARRIED, DIVORCED, SEPARATED, WIDOWED?"
- Questions concerning pregnancy, birth control, children, or future child-bearing plans.
- Direct or indirect questions which would indicate an applicant's ancestry, national origin, race or color.
- Any questions that, if answered, would reveal religious affiliation, denomination, customs, holidays observed, or name of minister.
- Questions about age, except to ask if the person is of legal age to work (16).