

# CAREGIVER MANAGEMENT 101

## Objectives:

1. Establish one's needs and financial means of meeting them
2. Introduce a hiring/scheduling method to suit one's personal needs
3. Maximize team management and communication skills

## **INTRO:**

There may come a time when your current care situation may not fit your needs anymore.

- You become more independent
- Your living situation changes
- Family members currently caring for you are unable to do so
- A current caregiver decides to move in a different direction

Finding the perfect team to help you maximize your independence and help you lead a full and thriving life can be a stress free process!

## **1. KNOW YOUR NEEDS AND FINANCIAL MEANS OF ACHIEVING THEM**

### a. NEEDS ASSESSMENT

- i. *No one will be a better caregiver for you than you.* Be clear on what you need help with so you can get the proper services delivered to you and your life can consistently move forward smoothly.
- ii. Depending on your needs you may require a licensed professional to perform certain duties (especially if hiring through an agency).
  1. Duties that may require a RN, LVN, or CNA if contracted through an agency (check with your state's laws regarding specific medical procedures):
    - a. Bowel care – digital stimulation, medicine insertion is considered an invasive procedure, how often?
    - b. Cathing – intermittent cathing, changing foley cath, changing super pubic tube, how often?
    - c. Wound care – dressing and/or monitoring of a pressure sore
    - d. Medication - dispensement, administration, IV injections
    - e. Some agencies require a hooyer lift for all dependent transfers
  2. Transfers – height, weight, devices (hoyer, slid board, sling), tub transfer, how many? Independent? Minimal assistance? Fully dependent?
  3. Bathing/Dressing – max/min assist? Daily?
  4. ADL's – meal prep, laundry, shopping, housekeeping, driving, paperwork

5. Hours/Shifts available
  - a. Daily
  - b. Mornings
  - c. Overnight
  - d. Split Shift
  - e. Specific Times
  - f. Pay rate
- iii. What type of person are you looking for?
  1. personality
  2. age
  3. worker -vs- babysitter –vs- friend
  4. skills
  5. List excellent caregiving and employee qualities

## b. SOURCE OF PAYMENT

- i. Medicaid
  1. U.S. health program that services US citizens or legal permanent residents, low-income adults & their families, and people with certain disabilities
  2. A means-tested program (you must financially qualify) jointly funded by state and federal governments
  3. Managed by individual states
- ii. Health Insurance Premium Payment Plan (HIPP)
  1. A Medicaid program that allows a recipient to receive free private health insurance paid for entirely by their state's Medicaid program
  2. Recipient must be deemed 'cost effective' by their state
- iii. Medicare
  1. A national social insurance program administered by the federal government
  2. People who receive SSDI are eligible while they continue to receive SSDI
  3. People are NOT eligible if they stop receiving SSDI
  4. 24 Month exclusion
    - a. People who become disabled must wait 2 years before receiving government medical insurance, unless they have a specific listed disease
  5. Some people qualify for both Medicare and Medicaid
  6. Your income dictates your premiums and out of pocket medical and hospital expenses
  7. Standard benefit package that covers medically necessary care from most any hospital or doctor in the country
- iv. Medicare Advantage Plan

1. Medicare beneficiaries given the option of receiving benefits through private health insurance (Part C) or original Medicare (Parts A and B)
  2. Prescription drug coverage
  3. Monthly premium
    - a. Can add additional benefits such as vision, dental, gym or health club benefits
  4. Uses a “network” of providers
    - a. Going outside the network may require referrals or extra fees
  - v. Private Insurance, Insurance Settlement, Worker’s Compensation
  - vi. Out of Pocket
    1. you choose who works for you, for how much, the payment schedule, and you directly pay the employee
    2. must keep accurate records
    3. usually hire as independent contractors
      - a. employees file W-9, you issue 1099 in January
  - vii. Sometimes insurance companies will only pay certified or licensed employees, and sometimes you can only contract through agencies
    1. there may be ways to maneuver around this.
- c. PAYMENT SCHEDULE
- i. Weekly, monthly, bi-monthly
  - ii. Per hour or salary
  - iii. Personal check or via agency

## **2. HIRING AND SCHEDULING**

- a. WHERE TO ADVERTISE
  - i. Agency
    1. you have the right to interview potential caregivers
  - ii. Word of mouth
    1. good for references
  - iii. Craigslist
  - iv. Churches
  - v. Fraternity/Sorority
  - vi. Local colleges
    1. nursing, OT, PT programs
  - vii. Be specific about your wants and needs in your advertisement
  - viii. Be discerning
  - ix. Be selective – you are not desperate
  - x. [Example of Employment Opportunity AD Placed](#)

## b. HIRING PROCESS

### i. Written response to advertisement

#### 1. Veto indicators

- a. Using all lower case letters and ignoring all punctuation
- b. Not addressing questions asked
- c. Any group ideas?

#### 2. Good Responses

- a. All questions are answered
- b. The applicant has other activities/passions in their life
  - i. Demonstrates a healthy and balanced mind/attitude and the ability to set goals and strive to achieve
- c. The response shows personality
- d. Any group ideas?

### ii. Initial contact phone call

#### 1. Important Questions to Ask

- a. Do you have reliable transportation
- b. Do you have kids? If yes do you have a support system in place so if one gets sick it will not effect your ability to attend work
- c. Ask about their hobbies/interests/lifestyle
- d. Discuss the importance of consistency and reliability
- e. What would be good questions to ask at this point?

#### 2. Go over general description of job position and what a typical shift looks like

#### 3. Good responses

- a. Able to respond in some detail
- b. Also asks questions for themself and can carry parts of the conversation
- c. Ideas?

#### 4. Bad responses

- a. One word answers
- b. Lack of focus
- c. Ideas?

### iii. In-person interview

1. Review in more detail the job description, requirements, issues and concerns specific to SCI
2. Review pay and payment schedule
3. Do they have any questions about the job?
4. What are your first impressions
  - a. Your initial impression is usually pretty accurate
  - b. How is their vibe?
  - c. Do they look physically capable to handle the job?

d. Are they well kept? Would you want this person to represent you?

iv. Training

1. This does not have to be stressful
2. 2 days
  - a. Day 1: following one of your favorite caregivers
    - i. Make sure to point out reasons why you like the caregiver's technique
  - b. Day 2: doing all the work themselves being shadowed by one of your experienced caregivers
3. Everyone has particulars
  - a. Training gives your new caregiver to learn specifics about you
    - i. ie. I like it quiet in the morning

### **3. TEAM MANAGEMENT AND COMMUNICATION**

a. **HELPFUL HINTS TO KEEP YOUR TEAM RUNNING EFFICIENTLY**

- i. Make a list of daily duties that are in an accessible place (also a good place to note particulars and preferences)
- ii. [Contact Info Sheet](#) – always posted so caregivers can reach each other in order to cover each other (these should be approved by you)
  1. this helps everyone feel apart of the team
- iii. Daily chores chart
  1. ie. Monday - vacume
- iv. Caregiver communication binder
- v. Calendar posted with upcoming events and appointments
  1. keeps caregivers in the know of what to expect of upcoming shifts
- vi. White board for shopping list
  1. if something runs out it is put on the board, no more guessing games
- vii. establish a secure way of entering the house that can be easily changed if someone leaves your team

b. **GOOD COMMUNICATION SKILLS**

- i. Speak clearly and precisely
- ii. Caregivers cannot read your mind
- iii. Do not emotionally react
- iv. "Please" and "Thank you" go a long way
- v. Show appreciation
- vi. Caregivers are not robots
- vii. Caregivers are not perfect and neither are you

- c. RULES I UTILIZE WITH MY CAREGIVERS (may not suit all situations)
  - i. This is MY house
    - 1. when you take ownership of your house and live it helps your caregivers function better in their role
    - 2. its hard for caregivers to know their role when the employer is checked out
  - ii. I will respect you with my words and actions, you will respect me with your words and actions
  - iii. Integrity! Integrity! Integrity!
    - 1. mean what you say, say what you mean
  - iv. No drama
    - 1. their personal life is not allowed to effect their job performance
  - v. No smokers
  - vi. Employers – know where all your stuff is!

#### **4. FIRING**

- a. STEPS TO TAKE BEFORE FIRING
  - i. Express concerns before they repeatedly pop up so frustration doesn't build up and you lash out inappropriately
  - ii. Make sure all employees are aware of the rules
- b. GIVE EXAMPLES OF REPEATED BEHAVIOR THAT WAS ASKED TO CHANGE BUT DIDN'T
- c. HAVE FINAL PAYCHECK TO GIVE AT TERMINATION
- d. CHANGE ALL ACCESS TO YOUR HOME
  - i. Access codes
  - ii. Hiding spot for keys