

# SECTION 2

## Developing Your Job Description

- Step 1 – Identify tasks that must happen
- Step 2 – Identify tasks that need to happen but are flexible
- Step 3 – Compare list of tasks with person-centered plan
- Step 4 – Identify skills and qualities for employees carrying out these tasks
- Step 5 – Write your job description
- Section 2 Checklist



## **Developing Your Job Description**

Congratulations! Having recognized the benefits of self-directing your personal assistance supports and services, you are ready to hire a personal assistant (PA). In this section, we will walk you through developing your job description, step by step.

- Step 1. Identify the tasks that must happen.
- Step 2. Identify tasks that you need to have happen but are flexible about when they happen.
- Step 3. Match what you want done to what you can pay for through your plan of care (person-centered plan).
- Step 4. Identify the skills and qualities for employees carrying out these tasks.
- Step 5. Write your job description with the information you have collected.

Doing these 5 steps now will save you time and effort later. Let's start.

## ❑ Step 1 - Identify the tasks that must happen.

The first step in creating a job description is to identify the tasks that must happen. Formal self-assessment can help you decide what your needs are. These needs will become the tasks that your PA will do.

A self-assessment tool, the Job Description Development Tool (Appendix C), is included in this Toolkit. The self-assessment tool is formatted to help you consider a wide variety of tasks and activities. Use this tool to identify tasks important to you and consider how a PA can assist you.

Also, remember that natural supports such as neighbors, friends and family can be used as a part of your daily routine.

- Natural supports can be people in your life who are able to provide services and do not have to be paid.
- Natural supports are often simply the neighborly things we naturally do.

For example, if you need someone to take your trash to the curb, your neighbor may take yours as she walks by because it's convenient. You may be able to help your neighbor by walking her dog when you go out for a walk.



Another area to assess is your current use of assistive technology and assistive technology devices or equipment that might help you do some tasks more independently. For example, you may want to use a rocker knife, adaptive pan handle or other assistive device or utensil so you can prepare food rather than having someone else cook. You might decide to use a "reacher" to get items by yourself or a shower chair so you need less help showering.

Take this opportunity to look at the "big picture." You'll have to make some choices about services you want and those you need but you can do that later. Now is the time to think about what you need and what you want. Once you have completed the self-assessment process, whether by using

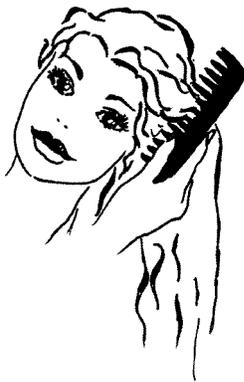
the Job Description Development Tool or in another way, you are ready to make a list of the tasks that your PA must do.

To help you with your planning, you can use the Job Description Planning Worksheets at the end of Step 1. These worksheets have room to record your decisions for Steps 1, 2 and 3.

Let's think about Step 1 now. As you know, Step 1 is about identifying the tasks that you have decided must happen. All people have similar needs that can be divided into four areas:

- personal care,
- domestic/household,
- health & safety and
- community.

### Personal Care



People have tasks in the area of personal care, for example, taking a bath or a shower, getting dressed, brushing their teeth, shaving, transferring and keeping a sleep schedule. Can you think of any other personal care tasks that you need to list? Some people need some help to get these tasks done; that help can come from a PA, a friend or family member (often called natural supports) or an assistive technology device.

Using the first worksheet, Job Description Planning Worksheet – Personal Care, write in the task, the day and time the task must be done and put a check mark in the column titled “Step 1” if it is a required task. We'll think about the other steps later.

### Domestic/Household

Some people have needs in the area of domestic and household chores or work. Are you hiring your PA to go grocery shopping with you? Or, are you hiring your PA to do your grocery shopping for you? Or, maybe grocery shopping is something you always do with your aunt and is not an area that you plan to hire a PA to do. You still want to



list the task of “grocery shopping.” You can think about who does each of your tasks in Step 4. Other kinds of tasks to consider include: meal preparation, eating, laundry, cleaning/ housekeeping and pet care. Are there other tasks you need to list? Use the second worksheet, Job Description Planning Worksheet – Domestic/Household.

### Health & Safety

The third area to consider is health and safety. In this area, many people list tasks like taking medication, getting to PT (physical therapy) or OT (occupational therapy) appointments, home maintenance help and communication skills. Do you have other tasks on your list for health & safety? You can list them now on the third worksheet titled “Health & Safety.”



### Community



The fourth area is community. Think about the kinds of activities that you do away from home. What tasks do you want your PA to do? Do you need assistance with writing a check, transportation to the bank or help paying for tickets at the movies? What other tasks? Have you thought about leisure activities you like? Maybe attending church, synagogue or mosque services, or getting to and from work? If you still have tasks on your list that don't fit these areas, make your own area and list your tasks on the worksheet, “Community.”

# Job Description Planning Worksheets for 4 Life Areas

Job Description Planning Worksheet – PERSONAL CARE							
Personal Care	Day/Time	Task	Step 1	Step 2	Step 3		
			Required	Preferred	Paid	On My Plan	# Hrs for Task
Example Tasks:							
Taking a bath							
Brushing teeth with electric toothbrush							
<b>Reminder:</b> Think about natural supports and assistive technology options							



## Job Description Planning Worksheet – HEALTH & SAFETY

Health & Safety			Step 1	Step 2	Step 3		
	Day/ Time	Task	Required	Preferred	Paid	On My Plan	# Hrs for Task
Example Tasks:							
Reminder to take medicine							
Assist with mowing the grass							
<b>Reminder:</b> Think about natural supports and assistive technology options							

## Job Description Planning Worksheet - COMMUNITY

<b>Community</b>			<b>Step 1</b>	<b>Step 2</b>	<b>Step 3</b>		
	<b>Day/ Time</b>	<b>Task</b>	Required	Preferred	Paid	On My Plan	# Hrs for Task
Examples:							
Drive me to work							
Provide support for me at meetings							
<b>Reminder:</b> Think about natural supports and assistive technology options							

**❑ Step 2 - Identify tasks that you need to have happen but are flexible about when they happen.**

Next, you'll identify the tasks that you need to have happen but you are flexible about when they happen. This is the time to also identify tasks that you would like to have happen but maybe haven't been able to accomplish up to this point. These tasks together with the tasks you identified in Step 1 will become the basis for your job description.

Read through the tasks listed in the examples below regarding personal care, domestic and household activities, health and safety issues and community access. You'll notice that these are the kinds of activities and routines you considered when you did your self-assessment. Think about each job task. Is this a task that can be accomplished through natural supports, assistive technology or a personal assistant?

### Example Tasks for Job Description

#### Personal Care

PA may complete aspects of personal care in regards to bathing, shaving, dressing, toileting, oral hygiene, transferring and sleep schedule as directed by employer. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

An illustration of a bathroom. On the left is a shower stall with a glass door. In the center is a toilet. On the right is a vanity with a sink, a mirror above it, and a cabinet with three drawers.

For example:

- Assist me with bathing, dressing and hair care
- Assist me with transfer from my wheelchair to the toilet
- Fix my hair and do my makeup if I request
- Help me transfer between wheelchair and bed
- Assist with personal hygiene, including washing hair and shaving

## Domestic/Household



PA will assist with any necessary domestic or household tasks that might include: shopping, meal preparation, eating, laundry and cleaning/housekeeping. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Ask me what I want for breakfast
- Prepare my breakfast
- Thaw frozen meat if necessary
- Vacuum the carpets
- Do laundry
- Dust furniture
- Clean bathroom well once a week, and a quick clean-up (toilet, tub and sink) each day

## Health & Safety

PA may assist with tasks regarding employer's health and safety possibly including medication administration, stretching therapy needs and home maintenance.

PA will also follow the communication guidelines established in the interview and training process.

Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Assist with daily range of motion or stretching therapy
- Remind me to take my medications
- Wash breathing equipment

## Community

PA may assist with activities in the community including: banking, participation in groups, community access, participation in religious activities, job activities and transportation. Specific tasks will be outlined in PA job description and agreed upon by employer and PA.

For example:

- Provide support when I'm at a meeting
- Drive to work, errands and recreation

## Other

PA is expected to follow the rules set by employer in regards to smoking, the use of drugs and alcohol, sex, guests, overnight guests and what is expected of PA while employer is resting or asleep.



For example:

- My home is smoke-free. Smokers may smoke outside, but not in my home or in my car.

Use the Job Description Planning Worksheets you started in Step 1 to continue planning. List the additional tasks you identified in Step 2.

This is a good time to think about what day and what time of the day you want each of the tasks accomplished. Many of the tasks you want your PA to do need to be described in some detail so that your new PA will know what you want done, how it should be done, and when to do it. Be as clear about what you want as you can be.

**□ Step 3 - Match what you want done to what you can pay for through your person-centered plan (plan of care).**

Your plan of care is the document or person-centered plan you developed with your case manager and other friends. In Step 3 you will compare your list of tasks to the services you are able to pay for through your person-centered plan or plan of care. This is an important step. You must determine if the tasks you want your PA to do are tasks that you can pay for with personal assistance funds. This is also the right time to find out how many hours you have for your PA.

When you know how many hours of PA services you have and the tasks that you can pay a PA to do, you may not have covered everything you want done. This is a good time to consider natural supports. Natural supports, having friends or family assist you without charge, can be an important part of the relationships you have developed. Be sure not to overlook them.

There is a section of the Job Description Planning Worksheets you worked on in Steps 1 and 2 that you can use for Step 3.



Step 3 has three parts: “Paid,” “On My Plan” and “#Hrs for Task.” Using your worksheet, look at each of your tasks. Make a checkmark in the “Paid” column for each of the tasks that you intend to use PA services to do. Put a checkmark in the “On My Plan” column if your personal assistance funds will pay to have a PA do the task. And finally, guess how long it will take your PA to do each task and put that amount of time in the “# Hrs (Number of Hours) for Task” column.

When you’ve finished going through your list, add up the amount of time you think it will take your PA to do the tasks that meet your funding requirements. Does the number of hours that you want match the amount of time you have for your PA job? If it does, hurrah! Move on to Step 4.

If not, look at your list of tasks again. Think how you can use additional natural supports or assistive technology to accomplish your goals.

#### **□ Step 4 - Identify the skills and qualities for employees carrying out these tasks.**

In Steps 1 and 2 you identified both the required and preferred tasks you want your personal assistant (PA) to do. In Step 3 you matched your list of tasks with your person-centered plan and determined the amount of time you have available for PA services.

In Step 4 you'll think about the skills and qualities your PA should have and the type of person you need. You're looking for a competent person that you like. A competent person has the skills he or she needs to do the tasks you identified in Steps 1 and 2 or can learn to do the tasks.

#### Competencies = Qualities and Skills

Competencies are the qualities or skills you want your PA to have. Different qualities are important to different people. What qualities and skills are important to you? You decide what is most important to you based on your personality, the tasks you need to have done and how often you are going to have contact with your PA. You may want to include a list of competencies in your job description so your PA will know exactly what qualities you expect them to have.

A sample list of competencies is included in Appendix D. You'll notice that each competency is defined. These definitions explain what actions a person would do to fulfill the performance expectation of the competency. For example, find the competency "discrete." If you want to hire a PA who is "discrete," you would look for someone who knows how to protect your privacy. This person would not share private information about your life, needs and care with anyone else.

As you use this list to help you identify the competencies that are meaningful to you, note your decisions on the worksheets on the following pages.

Notice that there are three parts to this set of worksheets, A, B and C.



The first page, **Worksheet A** is a list of the competencies and definitions you found in Appendix C, Sample Job Competencies. On Worksheet A, put a checkmark beside each competency as you decide whether it is:

- Very Important,
- Somewhat Important or
- Does Not Matter.

Use the blank spaces for other competencies you want your PA to have.

The second page or **Worksheet B** asks you to think about the kind of qualities, skills and talents you want your PA to have.

- Is the right PA for you a quiet person or a talkative person? Does it matter to you?
- Are you looking for someone who likes to go to the late, late show at the movie theater?
- Do you want someone to go skateboarding with you?

Think about what other qualities you want your PA to have and add them to the worksheet. Then checkmark each of your choices:

- Very Important,
- Somewhat Important or
- Does Not Matter.

The third page, **Worksheet C** includes some questions to think about with space to add your own.

## Finding the Right PA – Personal Preferences Worksheet - A

<b>A</b>	Competencies	Very Important	Somewhat Important	Does Not Matter
About the Right Personal Assistant for Me	Work commitment			
	Building relationships			
	Communication skills			
	Teachable (willing to learn)			
	Action oriented			
	Problem solving			
	Physical strength/coordination			
	Housekeeping			
	Personal appearance			
	Time management			
	Punctual			
	Scheduling/reporting			
	Record keeping			
	Discrete			
	Compassionate			
	Respectful			

## Finding the Right PA – Personal Preferences Worksheet - B

<b>B</b>	Other Qualities/ Skills/ Talents	Very Important	Somewhat Important	Does Not Matter
About the Right Personal Assistant for Me	Male			
	Female			
	Younger			
	Older			
	Night person			
	Morning person			
	Social			
	Talkative			
	Quiet			
	Sense of humor			
	Likes my pet			

## Finding the Right PA – Personal Preferences Worksheet - C

<b>C</b>	Other Questions to Think About
About the Right Personal Assistant for Me	<p>There are other things to think about as you begin your search to find a PA who matches the qualities and skills you want. Think about questions like these:</p> <ul style="list-style-type: none"><li>• Would I hire someone who smokes cigarettes?</li> <li>• What do I think about my PA consuming alcohol in my home?</li> <li>• What will I do if my PA wants to bring friends or family to my home during work time?</li> <li>• Will my PA eat with me? Will PA eat my food?</li></ul> <p>What other questions can you think of that would help you predict whether your new PA is a good match to the job you have to offer?</p> <ul style="list-style-type: none"><li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li></ul>

## How many PAs do you need?

By now, you've determined how many hours of PA services you have and you've thought about the competencies, skills and qualities you want your new PA to have.

A couple of points to think about as you develop your PA's work schedule:

- Total hours of need = routine, predictable needs + 25% allowance for occasional or unexpected events. Be sure to leave a little "cushion" of time to cover those extra or unexpected things that happen.
- Consider hiring more than one PA. Many people say that hiring more than one personal assistant provides for increased security and flexibility. By hiring more than one PA you have a "pool" of PAs to draw from during holidays or when a PA needs time off. For more information about planning for "back-up," see Section 9 – PA Back-Up Plan.

For example: 30 hours / week can be divided by 2 PAs, making two 15-hour, part-time jobs or 4 PAs with 7-8 hours each.

## Wrapping up Step 4



Everyone's needs are different. Taking the time now to identify the qualities and skills that are important to you will help you make a successful match of person and job. Additionally, this is information that you can use when you begin training your new PA based on the skills you selected for your PA to succeed. For more information on Training, see Section 7 – Training Your PA.

**□ Step 5 - Write your job description with the information you have collected.**

You have the information you need to create a job description. You know what tasks you want your PA to do, how many hours you have to schedule, and the skills and qualities your PA needs to accomplish the tasks.

Take a look at the Sample Job Description on the next page. Notice at the end, there is a place for both your PA and you as the employer to sign. This is necessary to protect you and your PA. With a signed agreement in place, there can be no confusion about job expectations. The employer cannot expect the PA to do tasks not agreed to in the job description and the PA cannot disregard responsibilities listed in the job description.

In order for the job description to be effective as an agreement between you and your PA, it is vital that:

1. You are specific when writing the job description.
2. You and your PA completely read and sign the Agreement.
3. Both of you keep a signed copy for your own records.
4. Both you and your PA know your roles and responsibilities.

Following the Sample Job Description is the Personal Assistant (PA) Job Description Worksheet. You can use this worksheet to write in your own information and create a job description for your PA.

## Sample Job Description

**Job title:** Personal Assistant (PA)

**Supervised by:** Jane Doe (a woman who is self-directing her personal assistance supports and services)

**Job summary:** To assist a woman with a disability throughout her daily and evening activities and routines.

**Work schedule:** M-F, 7 pm – 11 pm

Note: The Personal Assistant must only work the hours that are listed above. Any additional hours will not be paid. Changes in scheduled hours may be negotiable between the PA and the employer.

**Wages:** Wages for this position are \$8.50 per hour.

**Total hours weekly:** 20

**Benefits:** (You can get this information from the Payroll Agent. Benefits may include worker's compensation benefits and insurance benefits among others.)

**Qualifications:**

Prefer a person with a sense of humor, "night" person, punctual, discrete, female, non-smoker. Must be a licensed driver with reliable transportation.

**Duties and responsibilities:**

Assist with bathing, dressing, transferring  
Assist with meal preparation, serving meal  
Assist with physical therapy exercises  
Assist with home maintenance (for example, hanging pictures on the wall)  
Accompany me to movies, ball games, horse shows

**Working conditions:** The employee will work in the employer's home, but may need to do other tasks in different settings (for example, social settings, stores or appointments).

**Reliability:** The employee is expected to use time wisely so the services are done in the allotted time. If the employee cannot make the agreed upon time, a call with notice is expected.

**End of services:** The employee agrees to give at least a two-week notice prior to resigning from this position.

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**THIS JOB DESCRIPTION IS SUBJECT TO REVIEW OR REVISION ON AN ANNUAL BASIS OR WHEN A CHANGE IN JOB DUTIES IS REQUIRED.**

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I have received a copy of the job description for my records.

I have read the entire job description and understand my responsibilities.

I understand that this constitutes an agreement between the employer and myself, and does not guarantee employment.

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Signature of PA

Date

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Signature of Employer

Date

## Personal Assistant (PA) Job Description Worksheet

**Job title:** Personal Assistant (PA)

**Supervised by:** \_\_\_\_\_

**Job summary:**

**Work schedule:**

Note: The Personal Assistant must only work the hours that are listed above. Any additional hours will not be paid. Changes in scheduled hours may be negotiable between the PA and the employer.

**Wages:** Wages for this position are \$ \_\_\_\_\_ per hour.

**Total hours weekly:** \_\_\_\_\_

**Benefits:**

**Qualifications:**

**Duties and responsibilities:**

**Working conditions:** The employee will work in the employer’s home, but may need to do other tasks in different settings (e.g., social settings, stores or appointments).

**Reliability:** If the employee is going to be late or absent, a phone call is expected with notice. The employee is expected to use time wisely so the services are done in the allotted time. If the employee cannot make the agreed upon time, a call with notice is expected.

**End of services:** The employee agrees to give at least a two-week notice prior to resigning from this position.

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I understand that this constitutes an agreement between the employer and myself, and does not guarantee employment.

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Signature of PA

Date

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Signature of Employer

Date

## Section 2 Checklist

Check when done	Section 2 – Developing Your Job Description Checklist
	I understand how to identify the tasks my PA will do.
	I thought about how assistive technology could be used.
	I thought about where I can use natural supports.
	I understand that I can hire more than one PA if necessary.
	I read how to identify the qualities and skills my PA should have.
	I have enough information to write my job description.



