

TRANSITIONS IN CAREGIVING

*PARTICIPANT
GUIDE*

2009 Version



This is a handy reference guide for things you need to know about
Transitions in Caregiving

**With thanks to the *Transitions in Caregiving* project team who worked together to develop the processes outlined in this guide.
Their wholehearted commitment to provide comprehensive supports to family caregivers in a consumer directed model is exemplary.**

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Table of Contents

Chapter 1 Introduction

Useful Definitions	3
Roles, or.... Who Wears What Hat?.....	5
Participant Rights and Responsibilities.....	5

Chapter 2 Individual Budget..... 6

What is my Budget and how is it determined?.....	6
Budget responsibilities.....	7
Making Purchases Consistent with Budget Worksheet.....	8
Keeping Track of Your Budget and Spending.....	8
Updating Your Budget Worksheet.....	9
Respite Care Services.....	9
Supplemental Services.....	10

Chapter 3 Family Managed Employees..... 11

Finding Respite Care Providers.....	11
Advertising.....	12
Screening and Interviewing.....	12
Check References.....	14
Training	15

Chapter 4 Working with your Transitions in Caregiving Support Agencies..... 16

Chapter 5 Working with Gateways Community Services..... 17

Payments.....	17
Payroll.....	18



Chapter 1 - Introduction

Welcome, and thank you for participating in the *Transitions in Caregiving Project*. Before you begin using consumer directed services, there are some things you need to know. This Participant Guide is designed to give you answers to your questions and basic information to get you started. Make sure that you read this Guide thoroughly.

The *Transitions in Caregiving* project is designed to give family caregivers more control over how they receive respite and other services.

Since this is a new initiative this project may have some terms, words and guidelines than you may not be familiar with. The first things we will go over are some of the terms and definitions.

Useful Definitions

Assessment- Face to face meetings between the family caregiver and the Caregiver Specialist from the ServiceLink Resource Center for the purpose of assessing their caregiving situation and to assist in identifying services, local resources, equipment, home modifications and trainings that will allow the participant to augment their ability to continue to provide care for another individual. The assessment will take place when an individual is referred to the program and again at the end of the year to evaluate the project's effectiveness.

Budget Worksheet- Family caregivers eligible for services under the NH Family Caregiver Support Program will have funds set aside for services. The family caregiver, based on their particular needs, fills out a budget worksheet based on the amount of respite and other supplemental services the family caregiver may require. The Caregiver Specialist approves the budget. A cap on the dollar amount for services may be applied.

Caregiver Specialist – The Caregiver Specialist is an employee of the ServiceLink Resource Center. Their role is to help guide you through the process, provide you with enough information to make informed decisions about local services and resources available to you, and offer assistance should you need it. They will periodically check in with you and serve as an important contact for you throughout the project should you have questions.

Consumer Direction or Consumer Directed Services- What is it? Consumer Direction refers to an approach where individuals, such as yourself, manage your own support services. You will have the opportunity with assistance from the Caregiver Specialist to assess your own caregiving needs, decide how your needs are to be met, and monitor the quality of the services you receive. *Transitions in Caregiving* is a Consumer Directed project.



Family Managed Employee – A Family Managed Employee is an individual recruited, trained and managed by you, the family caregiver or your representative. The Fiscal Intermediary Service as the “Employer of Record” hires this Family Managed employee.

Financial Management Services, “Agency with Choice” model- Gateways Community Services is the agency that we have contracted with to handle the financial and personnel matters for Transitions in Caregiving participants. Essentially, they act as a third party that operates similar to a “bank” that also provides payroll services. They provide bill payer services to pay for invoices you submit to them under the guidelines of the *Transitions in Caregiving* project and act as an “employer of record” should you choose an individual not associated with an agency as a service provider.

Participant- A participant in the *Transitions in Caregiving* project is an informal, unpaid family caregiver (you) who meets the eligibility requirements of the NH Family Caregiver Support Program.

Person Centered Planning - Person centered planning is a service philosophy that emphasizes and individual’s personal preferences balanced against need. Consumer directed services are an outcome of person centered planning.

Provider - A person or agency who/that provides respite and other services for a fee. This could include: Family Managed Employees (see definition above) or an agency worker.

Respite Services- Services provided to the individual you are caring for to allow you, the family caregiver, to take a break from your caregiving responsibilities. These services may include companion care, personal care assistance, homemaker services, adult day programs or a temporary stay in a facility.

Representative- A representative is a person designated by you, the family caregiver, to assist you in managing some or all of the requirements of the program. This person acting as your representative **cannot** be paid to provide this assistance.

Supplemental Services – These are goods and/or services that complement the care that you, the family caregiver are providing. These services include: chore services (such as heavy house work/spring cleaning, yard work, snowplowing), health related consumable supplies (such as incontinence supplies), home safety repairs or modifications (that assist you in providing care, and/or aids with mobility), transportation services (such as to and from an adult day program), adaptive or assistive equipment (a device or equipment to maintain or improve the functional capabilities of individuals with disabilities) or emergency response system (such as Lifeline™ or other related service).

Support Plan – A written plan developed by you, the family caregiver, with assistance from the Caregiver Specialist outlining resources such as support group attendance, skills training, respite and other services that could aid you in your role as a caregiver while maintaining your own health and well-being.



Roles, or ...Who Wears What Hat?

The ***Transitions in Caregiving*** program is designed so that you will have maximum control over the services you receive, while adhering to the requirements of the NH Family Caregiver Support Program (which is funding your services). You will have two types of agencies providing you with assistance along the way. The two types of agencies are the ServiceLink Resource Center and Gateways Community Services, which provides the Financial Management Service. The roles they will fill in assisting you are as follows:

ServiceLink Caregiver Specialist (and other ServiceLink staff) will assist you in:

- Assessing your own needs
- Planning what services you could benefit from and writing out your Support Plan
- Completing your Budget Worksheet, providing guidance on how much help you need, who might help you, and how much to pay them.
- Monitoring your program by regular contact with you

Gateways Community Services will help you:

- Keep an “account” for you so you can track how much you are spending out of your budget.
- Make payments to your providers based on your instructions and approved Budget Worksheet.
- Inform you of procedures for payment requests for goods and services.
- Review and submit payment for items or services that you purchase based on your approved Budget Worksheet.
- Provide you with a monthly statement so that you can track how you are spending your budget and also to ensure that Gateways is handling your budget appropriately and accurately.
- Act as a co-employer of Family Managed Employees:
 - Do Criminal Background checks on all likely individual respite or service providers should you choose one as a Family Managed employee. (Staff of home care and other agencies are required to do these checks on their staff.)
 - Inform you of the procedures and forms to be used when reporting the hours worked by your Family Managed Employee (time sheets).
 - Review the timesheets you submit to ensure that they agree with your approved Budget Worksheet.
 - Handle personnel activities for individuals who act as Family Managed employees such as: withholding of taxes, providing worker’s compensation liability insurance and other wage related functions.

Participant Rights and Responsibilities

The following is a brief list of your rights and responsibilities as a *Transitions in Caregiving* participant.

You have the right to:

- Be treated as an adult, with dignity and respect at all times



- Privacy in all interactions with ServiceLink, Gateways and others as necessary and be free from unnecessary intrusion
- Make informed choices based upon appropriate information provided to you, and to have those choices respected, while respecting the rights of others to disagree with those choices
- Freely choose between providers for both respite and supplemental services.
- Voluntarily withdraw from the program at any time
- Ask questions until you understand
- Manage respite and other providers by:
 - Deciding whom to hire (if an individual not employed by an agency)
 - Deciding what special knowledge or skills the individual provider must possess
 - Training the provider to meet your individual needs
 - Scheduling the work hours
 - Replacing providers, either an individual or an agency who do not meet your needs
- Change your Support Plan and/or Budget Worksheet as your needs or goals change
- Receive monthly statements of how you have spent your budget
- You have the right to contact Gateways to request your current balance.

You have the responsibility to:

- To manage your budget and expenditures and have the skills and abilities needed to self-direct providers without jeopardizing your health and safety, or designate a surrogate representative to assist you
 - Act as a supervising employer (if you choose an individual as your respite provider) by:
 - Deciding wages
 - Following all requirements of Gateways Community Services as the Financial Management Services agency in regards to completing all necessary forms, reviewing time sheets for accuracy and submitting them in a timely manner.

Chapter 2 Individual Budget

What is my Budget and How is it Determined?

Your budget is the amount of funds you have available to you to purchase respite care and other services that help you in providing care. Your budget is based on what the NH Family Caregiver Support Program would normally allocate for respite services for you.

The Caregiver Specialist will assist you with your Budget Worksheet.

Your Caregiver Specialist will complete an assessment of your needs during your first meeting. He/she will ask you questions about your situation



to help determine what local resources may be of benefit to you in your caregiving role. They will ask you about the care recipient's need for assistance with bathing, dressing and using the bathroom or if they have been diagnosed with Alzheimer's disease or other type of dementia.

Your ServiceLink Caregiver Specialist will review the assessment to figure out and make recommendations on local resources and services so he/she could assist you in writing your Support Plan and filling out your Budget Worksheet.

You will use the Budget Worksheet (if paid resources are needed) to detail how you intend to spend your budget amount to meet your respite care and other related needs. When you fill out the Budget Worksheet you need to keep in mind that every purchase that you make has to be included in your Budget Worksheet or it will not be paid for by the Gateways Community Services. Refer to guidelines below on what you can and cannot spend your budget on.

Once you complete your Budget Worksheet, your ServiceLink Caregiver Specialist will review it for approval. Once it is approved a copy of the Plan of Support and Budget Worksheet will be given to you, a copy will be maintained at the ServiceLink site and a copy of the Budget Worksheet, only, will be sent to Gateways Community Services. All invoices and receipts you submit to them for payment will be checked against your planned budget.

If your situation changes and you need to make changes in your Budget Worksheet, contact your ServiceLink Caregiver Specialist so a revised budget can be drawn up. A copy of the revised Budget Worksheet will be approved by the Caregiver Specialist and be sent to Gateways. It is important that a revised budget is approved and sent in to Gateways. No doing so could impact whether or not the services will be paid for.

Please keep in mind that the respite and supplemental services funds in your Transitions in Caregiving budget are not intended to pay for all care and services. It is intended as a supplement to your own and other local resources.

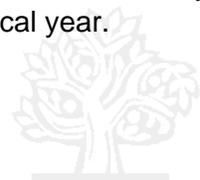
Budget Responsibilities

You have several responsibilities for using your Transitions in Caregiving budget. These include:

- Filling out a Budget Worksheet that is approved by the Caregiver Specialist.
- Making purchases that are consistent with your Budget Worksheet.
- Providing Gateways with documentation such as: invoices, receipts and/or timesheets to support payment requests.
- Keeping track of what you are spending each month so you do not overspend
- Updating your Budget Worksheet when your spending needs change.

Note: The funds in your budget are available until June 30th. The funds do not roll over beyond that date. Contact your Caregiver Specialist to be reassessed for the next fiscal year.

Let's discuss each of these responsibilities.



Filling out the Budget Worksheet

Your Budget Worksheet serves several purposes.

1. It describes how you plan to spend your Transitions in Caregiving budget.
2. Filling out the Budget Worksheet will ensure that you understand how much money you have to spend.
3. Purchasing only what is on your Budget Worksheet will prevent you from overspending.
4. The Budget Worksheet gives your ServiceLink staff an understanding of how your respite care and other service needs will be met.
5. It provides Gateways authorization for your payment requests.

If you are purchasing goods or services directly from a vendor or store, try to shop around to get the best price. Also check to see if the vendor is willing to get paid with a check from Gateways.

Work with your Caregiver Specialist to develop your Budget Worksheet and make sure he/she reviews it with you before you are ready to submit it for approval.

While reviewing your Budget Worksheet, your Caregiver Specialist will check to make sure it conforms to the Transitions in Caregiving program guidelines. He/she may ask you questions in order to get a better understanding of your plans. Your Caregiver Specialist will tell you if your plans for using the budget do not agree with Transitions in Caregiving guidelines.

After your ServiceLink Caregiver Specialist approves your final budget, you will both sign the original form; you will keep a copy, your ServiceLink Caregiver Specialist will keep the signed original in your file and a copy will be sent to Gateways.

Making Purchases Consistent with Your Budget Worksheet

You should buy the services and other purchases detailed on your Budget Worksheet. This confirms you are meeting your needs and effectively managing your own services. It also guarantees your budget is being used according to Transitions in Caregiving guidelines.

Since your providers' invoices will go to you it is your responsibility to fill out the check request form and submit it to Gateways for timely payment.

Keep Track of Your Budget and Spending

Gateways will send you a monthly statement that lists what was allocated on your budget worksheet, your expenses to date and the balance of funds in your account. The statement will be mailed to you. Please keep in mind that invoices that were sent in after the monthly statement was run will not be reflected in your expenses to date.

You must keep track of your spending so you do not overspend. Any expenditure outside of your budget you will be responsible for.



Updating Your Budget Worksheet

You can purchase only what you wrote down on your Budget Worksheet. However, changing needs may prompt you to alter how you use your funds.

You DO NOT need to Update your Budget Worksheet if:

The new services you are using are still within the respite or supplemental services categories. For instance, the individual you are caring for is no longer able to attend adult day and you find in-home respite would be more appropriate. You switch services. Adult day and in-home respite are both in the respite fund category. Therefore you do not need to submit a new budget worksheet.

You DO need to Update your Budget Worksheet if:

You want to shuffle funds between what you had originally allocated for respite and supplemental services. For instance, you had in your budget for yard work under Supplemental Services; however, you find you have a greater need for additional respite. You will need to fill out a revised Budget Worksheet moving the funds into the respite category and have it approved by your ServiceLink Caregiver Specialist. Call ServiceLink if you need a blank Budget Worksheet form.

Determining Your Needs

The Transitions in Caregiving program allows you to decide what types of services and purchases will best meet your needs. So before you actually complete your Budget Worksheet you need to decide the best way to use your budget to meet your respite care needs. Spend some time thinking about what is most important to you. Think about what you are currently getting help with now. Think about what things would make it easier for you to provide continued care. This information will help you when you fill out your Budget Worksheet. If you need some guidance with filling out the Budget Worksheet feel free to contact your Caregiver Specialist at ServiceLink.

Remember that the first priority (and major part) of Transitions in Caregiving is that you have control and choice over who provides you with help and when and how they provide it. So the first thing that needs to be done is to figure out how much help you want, what you want the help with, when you want the help and how much do you want to pay for the help. Your answers to these questions will determine how you write your budget.

Important to Consider: *Think about arranging back-up coverage. Have you a back up plan for emergencies?*

The help in terms of goods and services available through Transitions in Caregiving can be broken down into two main areas: Respite Care and Supplemental Services.

Respite Care

Respite care services are to provide you with a break from your day-to-day caregiving responsibilities. This can be in the form of companion care (someone to sit with the care recipient so that you can get out for a while and for socialization), in-home respite care (an individual or an employee of a



home care agency who will attend to the needs of the care recipient in order for you to take some time for yourself), an adult day program, or placing the care recipient in a residential facility for a few days. The goal is to give you a chance to “recharge your batteries.” Respite services can be provided by an agency or agency worker, a Family Managed Employee or by a contractor.

Supplemental Services

Supplemental services are services or goods other than respite that helps you provide continued care. These services can include “chore services” (such as heavy house cleaning, or spring cleaning - the big stuff, yard work such as raking leaves or shoveling snow); transportation (such as transportation to and from an adult day program, medical appointments and other transportation related expenses); assistive or adaptive equipment (assistive devices such as a Pocket Talker Pro® to aid in communicating with the care recipient who has hearing difficulties, other devices that aid in mobility or accessibility); emergency response systems such as LifeLine®; home modifications or safety repairs (such as modifications to the bathroom such as grab bars or raised toilets and home repairs for safety reasons such as repairs to stairs or walkways that pose a risk to the care recipient falling).

Figuring out your budget may take some trial and error to figure out exactly what is the right way to go. So think of different ways that you can get things done before filling out your Budget Worksheet. Please be aware that you can change your budget as different needs or situations arise.

Decisions, Decisions.....

In Home Respite Providers – Family Managed Employee or Contracting with an Agency?

Having someone come into your home to care for a loved one requires thought and planning. Here are some issues and ideas to consider.

Contracting with an Agency

There are many in-home care agencies that provide respite services, companion care, home health aides and homemaker services. You may find that working with an agency is more costly than employing an individual; however, an agency offers several advantages. Among the advantages is the assurance that your loved one will be cared for by a trained individual. Emergency coverage is also available if the employee becomes ill.

If you decide to contract with an agency, inquire about its accreditation and/or audit. Ask the state licensing body if the agency has any serious deficiencies. You might want to request references from the agency. It is also helpful to provide a job description that outlines the kind of care and assistance that is needed.

Using an Individual as a Respite Provider/Worker – “Family Managed Employee”

You may choose to use an individual as a respite provider rather than contracting with an agency. That individual can be a family member (living in another household), a friend, a neighbor or an individual you recruit (see how to



recruit a worker in the next section). But, in order to do so that individual will need to be formally hired under Gateways as the “employer of record,” and you will take on the role as the managing supervisor of that individual. You will in fact be co-employers. That means that Gateways will provide the orientation and typical employer functions of providing the job application, background checks, payroll processing, and liability coverage, while you train and supervise the individual’s work. It is a shared role designed to relieve you of having to tackle payroll, workman’s compensation and tax withholding.

If you already know the individual you want to use as your respite provider work with your ServiceLink Caregiver Specialist to set up an appointment with Gateways’ Regional Agent to meet with the individual to get them started in the hiring process. The Regional Agent will have them fill out an application and all applicable forms. The individual will need to show proof of identification and citizenship. The Gateways Regional Agent will orient them on the payroll process and show them two training videos. Once the background checks are complete and you receive the okay, you are ready to start using them as a provider.

Chapter 3 - Family Managed Employees

Note: *This section is applicable if you choose to hire an individual as a respite care provider (rather than paying for services from a home care agency)*

Finding Respite Care Providers

Remember you can hire anyone you choose; the individual does not need any special training or license (unless you want them to). A provider CAN be a family member (except a spouse or another individual living in the same household), if you feel more comfortable hiring a family member. If you don’t have anyone in particular in mind to hire then you will need to find someone, and there are several ways to go about that.

You could use the old stand-by, word of mouth. Let people know you are looking to hire someone to help you. Many times a friend of a friend is looking for work, and usually a friend would not recommend someone to you unless they would be a good worker. You can also develop an advertisement or flyer and post it in the community (see the Guide for sample ads). Places you could post ads include bulletin boards at local markets, senior centers, libraries, colleges etc. You could also place an ad in a local or regional newspaper, but this would cost you money, (remember that you can put aside funds in your spending plan to cover the cost of advertising for your respite care provider). You can also ask your ServiceLink Caregiver Specialist for ideas.

This section provides information, helpful hints and suggestions on recruiting a respite provider/worker. The topics covered in this section include: recruitment, interviewing a worker, reference checks and selecting the worker.

Advertising



There are both paid and free advertising options available to you. Regardless of the type of advertising you choose or where you advertise, there are some basic guidelines to keep in mind:

- Give clear job expectations and candidate requirements
- Emphasize important details and worker characteristics
- Be honest, realistic, and make no vague promises
- Comply with state and federal laws on discrimination (this means you cannot state in an ad that you need someone to be Catholic or Jewish, male or female, or black or white).
- Protect your privacy! (It is not a good idea to list your address or full name. Instead, use just your first name and phone number.)

Sample Ads

IN-HOME RESPITE PROVIDER

Individual needed to provide respite care for older adult and assist primary caregiver in a variety of needs. Flexible schedule. HS or GED, clean driver's license, and reliable transportation are required. This position is located in Plymouth. Call.....

HOME HELPER WANTED

Dependable person to do housework, grocery shopping and prepare light meals for older adult. Mornings, M,W,F. References required. Phone.....

Telephone Screening

Screen all applicants over the telephone and take notes on each. This is your chance to screen applicants and decide whom you should meet in person to interview. The screening should involve three general steps:

1. Inform the Caller

- a. Let the candidate know the hours you will need someone to work.
- b. Let the candidate know the general location of the house but do not give out the address (protect your privacy!)
- c. Outline the tasks to be done and any requirements. This might include someone who can drive or lift a specific amount of weight.

2. Ask Questions

It is a good idea to ask applicants questions, whether they are your own or some suggested ones below. Listen carefully to their responses and take notes. You might get a sense of their attitude and personality. Note: See chart below for important do's and don'ts of interview questions.

- a. Are you 18 or older? (they must be 18 or older to be hired)
- b. What experience do you have? Have you been in a similar position?
- c. If so, where did you work, how long did you work there, and what did you do?
- d. What days and hours are you available to work?
- e. Can you perform all the duties that I have outlined?
- f. Do you have transportation to get you to the job?
- g. Have you ever been convicted of a crime?
- h. If you are hired, when could you start?
- i. What are their wage expectations?



Conclude with thanks. Each caller should be informed that you are still taking calls for the position. If you are interested in the applicant, indicate that you will call back in a few days to set up an interview.

3. Select Applicants and Arrange for Face-to-Face Interviews

You should only select people that sound extremely good to you for a formal interview. Make sure to write down the person's name and phone number in case you need to contact them again before the interview.

- a. Arrange the interviews in a public place rather than in your home.
- b. Allow 45 minutes to an hour for each interview
- c. Have a list of questions prepared prior to the interview
- d. Start on time
- e. Listen more and talk less.
- f. Never make the offer on the spot; keep your options open.
- g. Tell the candidate that you will check all references before making an offer.
- h. Bring a family member or friend along on the interview. A second person will be able to observe the candidate and be able to offer a second opinion.

Important!!

*There are rules involved when interviewing someone for a job. There are certain questions that you cannot legally ask someone during the interview process. If you do ask those questions you are breaking the law. A list of those questions is included below. Make sure you familiarize yourself with it **before** you start interviewing people.*



Interview Questions – Important Do’s and Don’ts		
There are certain questions that are illegal to ask under both the federal and state laws and include questions about an applicant’s birth date, race, national origin, sexual orientation, native language, health problems or disabilities, physical fitness marital or parental status or religion.		
Subject	Illegal Questions	Legal Questions
National Origin/ Citizenship	<ul style="list-style-type: none"> • Are you a citizen? • Where were you/your parents born? • What is your “native” tongue? 	<ul style="list-style-type: none"> • Are you authorized to work in the U.S.? • What languages do you read, speak and write fluently? (this ability must be relevant to the job)
Age	<ul style="list-style-type: none"> • How old are you? • What is your birthday? 	Are you over the age of 18?
Marital/Family Status	<ul style="list-style-type: none"> • Are you married? • Are you living with someone? • Do you plan to have a family? • How many kids do you have? • What are your childcare arrangements? 	Ask questions like: <ul style="list-style-type: none"> • This job requires some evening hours. Would you be willing to work some evenings as necessary? • Punctuality is essential in this job. Can you assure you will be on time?
Affiliations	To what social or religious organizations do you belong?	Do you belong to any professional groups that you consider relevant to your ability to perform this job?
Personal	<ul style="list-style-type: none"> • How tall are you? • How much do you weigh? 	<ul style="list-style-type: none"> • Questions on personal attributes are illegal. If you need assistance with transfers, you can ask all applicants. • Are you physically able to transfer someone of a particular size and build?
Disabilities	<ul style="list-style-type: none"> • Do you have any disabilities? • Have you had any recent or past illnesses or operations? • What was the date of your last physical exam? 	Are you able to perform the essential functions of this job with or without reasonable accommodations? (You must first thoroughly describe the job before asking this question.)

4. Check References

- Confirm the length of employment at each position.
- Determine the actual job description or assistance provided.
- Ask about interaction between employee and the person receiving care.
- Check to see how the employee accepted direction and supervision.
- Ask about the worker’s reliability and dependability.
- See if there were any problems encountered in the work relationship.
- Ask if the previous employer received timely information regarding the loved one’s needs.
- Ask if the previous employer would hire the candidate again.

Remember that the employee you want with your loved one should be caring, conscientious, competent, compassionate and considerate.



The Transitions in Caregiving Program has only a few requirements of respite care providers. No individual can get paid utilizing funds in your budget unless they:

- Are at least 18 years of age
- Are legally able to work in this country
- Submit to, and pass a statewide criminal background check as well as the Department of Health and Human Services' Central Registry check
- Are not a Spouse or Legal Guardian of the participant

All individuals who are employed by Gateways Community Services as a Family Managed Employee the above information must be verified. This is done by Gateways as part of their employment verification process.

What if something shows up on the Criminal Background or the Bureau of Elderly and Adult Services (BEAS) Registry check?

You will **NOT** be able to hire an individual if the following happens:

- They have a criminal **conviction**.
- Their name appears on the BEAS Registry.

Training your respite provider

Training is one of the most important parts in managing your respite provider. You are the expert in knowing what needs to be done. Even experienced respite providers need to be trained in how YOU want things done. If you have had a respite provider before, you probably have a good idea of what works for you.

There is more than one way to train your provider. Some people will respond well to verbal instructions while others may respond better to hands on demonstrations. The main thing to make sure of is that the respite care is provided in the way that you prefer.

If you are training a new person, here are some things you might want to cover:

- Talk about the care needs of the care recipient and their abilities or disabilities. The more they know the better they will be able to meet your needs.
- Give a lot of examples and explain any technical terms you use.
- Talk about any symptoms or health concerns they need to be aware of. Include anything that may arise and how to handle that situation. Also include how you want emergency situations handled.



- As you go through your routine, explain why tasks need to be done. This will help your respite provider realize the importance of these tasks.
- Provide training on how to operate or use any special equipment. Things like wheelchairs, lifts, shower chairs etc.
- Praise good work and also don't forget to say "Thank You", this goes a long way.

By providing good training up front, you may increase the chances of a provider being able to be more effective at their job. Taking more time in the beginning can lead to better overall results.

Chapter 4 - Working with Your Transitions in Caregiving Support Agencies

The two support agencies that you will be in contact with in the Transitions in Caregiving Program are: the ServiceLink Resource Center and Gateways Community Services.

The Caregiver Specialist at ServiceLink can provide you with assistance with your budget and connecting you with local resources. Gateways Community Services provides the Financial Management Services for the program, namely, the bill payer and payroll services.

The first thing to remember is that everyone is different; some people can handle working with a budget for services and dealing with invoices easily and won't need a lot of help from the ServiceLink staff or Gateways. Some people may need more help in the beginning as they get used to the program. There is nothing wrong with contacting the Caregiver Specialist at ServiceLink or Gateways when you have a question, remember; they are there to help you as needed. So don't be shy about picking up the phone!!!

Having two agencies to help you with the program could be confusing at times, and you may not know which agency to contact with any questions you may have. Each agency has different responsibilities in helping you manage the Transitions in Caregiving program. The following table should help you decide which agency to contact with particular questions or issues.

Question or Issue	ServiceLink	Gateways
1. Time Sheets, Paychecks		✓
2. Results of Criminal Background Checks		✓
3. How much money you have left in your budget		✓
4. Taxes, Workers Compensation, etc.		✓
5. Monthly Budget Statement		✓
6. Payments to vendors/providers for approved purchases		✓
7. Reimbursement for approved purchases		✓
8. Assessments or Monthly budget amount	✓	
9. Transitions in Caregiving Participant Manual	✓	
10. Information on other programs	✓	
11. Recruiting, hiring, managing and firing Assistants	✓	✓



12. Tax forms, employment applications and forms		✓
13. Finding new workers	✓	✓
14. Enrolling in or Leaving the program	✓	

If your question doesn't fall under any of those topic areas, feel free to contact your ServiceLink Caregiver Specialist, if he/she can't answer the question they will direct you to where you need to go.

Remember that both agencies are there to help you when needed so don't be afraid to contact them as needed.

Chapter 5 – Working with Gateways Community Services as a Financial Management Services Agency

Below are some basic instructions you will need in working with Gateways as your Financial Management Services Agency. Following these basic instructions will help the process work smoothly. As always, if in doubt please do not hesitate to call. Remember, they are there to help you.

Services Provided – Payments, Respite Reimbursements, Payroll services.

Payment Schedule - Gateways processes payments and respite reimbursement requests within two weeks of receipt of request, with direct deposit as an option.

Payroll Schedule for Family Managed Employees – Gateways is on a bi-weekly pre-defined payroll schedule, with direct deposit as an option. The back of the timesheet has the payroll dates listed on it.

Direct Deposit – Gateways provides direct deposit services for Family Managed Employees. Some set up is required in order to do this.

Payments

- Invoice payments can be made directly to an individual who, or company that, has provided services or goods and provides you with an invoice listing the date(s) and service(s)/good(s) provided, cost of service(s), and to whom the payment should be made, including mailing address.
- Receipt payments can be made directly to you if you have already paid the invoice and provide proof of payment in the form of a receipt; bank or credit card statement (note: on the credit card statement you can white out information that is not pertinent to this transaction); copy of cancelled check front and back.

Process for Invoice Payments:



1. Complete the Gateways Payment Request Form (be sure to sign and include cost center)
2. Attach original invoice
3. Mail both the completed payment request form and the invoice(s) information to
Gateways Community Services
144 Canal Street
Nashua, NH 03063
Attention: Fiscal Coordinator – Leslie Boggis

Process for Receipt Payments:

1. Complete the Gateways Payment Request Form (be sure to sign and include cost center)
2. Attach original receipt
3. Mail both the completed payment request form and the invoice(s) information to
Gateways Community Services
144 Canal Street
Nashua, NH 03063
Attention: Fiscal Coordinator – Leslie Boggis

Note: One Payment Request Form can be used to request multiple payments

Ad Hoc Respite Reimbursements

Ad hoc Respite Reimbursement is a category that is used to pay for ‘quick’ out of pocket expenses that do not need to be accompanied by an invoice or receipt. For example, a neighbor or friend came to stay with your loved one on a one-time basis because your worker cancelled and you gave them \$20.00 as a “thank you.” Due to the nature of this category not requiring backup to the payment there is a limit of 10% of the total amount of your budget that can be used in this way.

Process for Ad Hoc Respite Reimbursement:

- Complete the Gateways Respite Reimbursement Request Form (be sure to sign and include cost center)
- Mail both the completed respite reimbursement request form to
Gateways Community Services
144 Canal Street
Nashua, NH 03063
Attention: Fiscal Coordinator – Leslie Boggis

Payroll

Gateways provides what is called “Employer of Record Services” for persons providing respite services under the Transitions in Caregiving Program and is responsible for completing tax, labor, and social security documents, as needed. They calculate and file tax documents, distributes wages to Family Managed Employees, manage workers’ compensation, disability, and benefit insurances, verifies citizenship/legal alien status and background record of support



providers. As a co-employer you hire, supervise, and discharge individuals in conjunction with Gateways. This is referred to as the Agency with Choice Model of service.

Process for Payroll (Worker-Family Managed Employee Payments):

- Time sheets are provided by Gateways
- Worker completes and signs time sheet
- Family supervisor reviews and sign time sheet
- Worker sends completed and signed time sheet to Gateways Fiscal Coordinator to be received, by 9 am Monday following the Friday pay period end date, via:
 - Fax: 603.889.5460 Attention: Fiscal Coordinator - Leslie Boggis
 - Postal Service to
Gateways Community Services
144 Canal Street
Nashua, NH 03063
Attention: Fiscal Coordinator – Leslie Boggis
- Gateways maintains an outside locked drop box marked Time Sheets to the right of our main entry for after hours drop off.
- Time sheets may be submitted via Electronic submission by the family supervisor. This does require a computer and training. If interested contact Gateways Fiscal Coordinator.



