

Workplace Personal Assistant Services Toolkit



Developed by Wisconsin Personal Services Association
in collaboration with the Managed Care and Employment Task Force
Wisconsin Department of Health Services

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Workplace Personal Assistant Services Toolkit

This toolkit will assist service provider agencies that serve or wish to serve people with disabilities in planning, developing and implementing the delivery of Workplace Personal Assistant (WPA) services. The toolkit includes financial and operational practices as well as human resource, training, management, and quality assurance tools. Included are sample procedures, policies, service costing worksheet, job descriptions, skills matrix, and recruitment and training requirements.

The purpose of this Toolkit is to present the provider with the resources they need to deliver support services to individuals with disabilities at their place of work. Many providers currently offer support services such as job coaching through supported employment funding for individuals involved in integrated, community employment. This project focuses on the personal care and support services that follow job coaching and that will be necessary for some employees with disabilities to maintain their employment over time. The assumption is that the individual receiving these Personal Assistant services will require some level of support on a long term basis in order to be employed. The specific services required will be individualized based on the person's personal care and long term support needs.

This Toolkit provides an outline of the various service models that can be used as an adjunct to the current Supported Employment and Job Placement service models that are funded by the Division of Vocational Rehabilitation.

The Personal Assistant will require a skill set and training that is reflective of the fact that the services and supports will be delivered in a community workplace. The required skill set and training must also reflect the expectation that services be customized and individualized to the person receiving the services as well as to the specific business where the person is employed. A provider who seeks to contract with a managed care organization or I.R.I.S. self-directed waiver participant for these services can utilize this Toolkit with its various resources, sample documents and service delivery models to provide trained Personal Assistants to support their employment goals.

Given the increasing emphasis on expanding opportunities for individuals with disabilities to participate in integrated employment, it is expected that the WPA services described in this Toolkit will be frequently requested. It is hoped that this Toolkit will assist agencies with timely and high-quality service development, ease of start up, and flexibility to manipulate the documents to their individual business needs.

The following is an outline of the Toolkit and its contents:

I. Overview of services provided through the WPA

A. Philosophy

B. Developing Models of Support

1. Models of support for Personal Care

a) Providing personal care at the worksite.

2. Models of support for Job Maintenance

b) Coordination of transition from Job Coach to Job Maintenance

II. Business Practices

A. Financial and budget

1. Service Costing Worksheet

2. Creating a budget to provide Workplace Personal Assistant services

3. Contracting with consumers and funding sources for services

B. Human Resources Policies

1. Follow Agency's current Human Resource policies and recruitment

2. Sample Job Description of the WPA

3. Skills Matrix for the WPA and Management

4. Sample Advertisement for WPA

5. Sample Interview Questions for WPA

C. Operational Policies

1. Rights and Advocacy of the consumer

2. Attendance Policy impact on consumer

3. Dress Code policy

4. Confidentiality

5. Cell phone and laptop Policy

6. Precautions for safe Transportation

7. Worksite Policy Safety and Privacy

8. Harassment Policy

III. Service Procedures

A. Contract Service Template

B. Developing a Service Plan from Assessment

IV. Quality Assurance Tools to Measure Outcomes

1. Maintaining employment Outcomes

2. Employer Satisfaction Survey

3. Consumer Satisfaction Survey

4. Performance Evaluations of the WPA

5. Cost Efficiency outcomes

V. Statewide Resources

A. List of websites for resources available to the agency

Overview of Services

Overview of Services Provided through the Workplace Personal Assistant

Philosophy

Over the years many individuals with disabilities have not had full access to employment due to time limited services provided in the workplace. Even the model of supported employment, which allows for an extended period of support beyond what is typically provided by the vocational rehabilitation system, is built upon an expectation that paid job coaching will fade over time. The purpose of this toolkit is to develop service models that will expand options for individuals needing either personal care services at the workplace and/or ongoing maintenance support after job training/coaching services have maximized a person's ability to work independently or with the assistance of unpaid natural supports.

The philosophy that drives these services is that each service plan is person-centered and accommodates the needs that each particular individual has in order to maintain employment. For one individual this may involve a personal care worker coming into the workplace at specific times to assist with toileting needs or eating. For another individual, this may involve being at the worksite during a substantial portion of the hours worked, assisting with behavioral support needs and/or assisting the individual to complete job duties in a model that emphasizes the critical concept of 'partial participation'.

Ultimately, through the delivery of these services, the individual is able to contribute to his/her community, work at a job that provides them with a paycheck, meet the needs of the employer and experience real opportunities for integration and full inclusion in the community.

Two Models of Workplace Personal Assistant Services

Model A - Personal Care Services at the Workplace

1. The individual with a disability may receive personal care services at the individual's place of employment, before, during or after their work shift. When personal care needs can be addressed within the context of the workday, this offers the opportunity for individuals with a disability to be employed as many hours as they are able to work. Often this may involve cares provided at key times for toileting, transfers, eating, medication administration, therapeutic movement, etc.
2. The individual will contract with a provider for specific cares and the number of minutes/hours provided during the workday. There also may be a need to contract for "PRN" or as needed hours, most typically for toileting cares.
3. The funding source will contract for these cares without restriction as to where those cares are provided.
4. An Individual Service Plan will be developed to determine when personal cares need to be provided and how those cares can be adjusted around the person's work schedule whenever possible. A critical question is to determine what essential personal cares must be provided at the workplace instead of at home.

Model B - Job Maintenance at the Workplace

1. The individual may have disabilities such that job coach fading to natural supports does not prove fully feasible and the individual is deemed to require on-site supports for a substantial portion of their work hours.
2. The tasks completed by the Workplace Personal Assistant will be individualized and specific to the abilities of the employee and the needs of the employer.
3. Physical assistance and behavioral supports, if needed, would be included in this model of support services.
4. Personal Care, if needed, would also be included in this model of support.
5. In this model, the individual will be paid by the business and the Workplace Personal Assistant will be paid by the funding source.

Transition from Job Coach to Job Maintenance Support

When should a person transition from job coaching to maintenance support provided by a Workplace Personal Assistant?

1. The concept of supported employment was born roughly thirty years ago. The model was designed to achieve cost-effectiveness through the fading of paid supports for supported employees over time. Fading is typically achieved through three strategies:
 - 1) Effective task analysis and training (e.g. systematic instruction), which allows a supported employee to do his/her job with only the supports that are available to employees without disabilities doing the same or similar jobs;
 - 2) Engagement of natural supports (namely co-workers) to provide additional supports a supported employee needs to satisfactorily perform his/her job duties, and that would not typically be needed by employees without disabilities doing the same or similar jobs
 - 3) Assistive technology which could replace human supports from job coaches or co-workers that the supported employee would otherwise need to satisfactorily perform his/her job duties.

All of these strategies are typically employed by a job coach, who is expected to fade his/her on-the-job involvement as these strategies result in a supported employee needing less of the job coach's assistance over time.

2. While this model has worked well and proven highly cost-effective for thousands of individuals across the country, these individuals represent only a small fraction of everyone who could benefit from supported employment. As we increasingly strive to make supported employment an option for all people with disabilities, including those with more significant disabilities who in the past might have been considered unemployable or only employable in a sheltered setting, we face the challenge of ensuring both adequate on-the-job supports and cost-effectiveness. While the concept of cost-effectiveness should never be simplified to mean "the cheapest

option", and the cost of much lesser quality alternatives should never be used as desirable targets for supported employment, we should also not ignore the importance of maximizing cost-effectiveness, particularly for the Medicaid-funded long-term care system, as a critical pre-requisite for achieving a policy of zero exclusion with regard to supported employment.

3. Adding the Workplace Personal Assistant role to replace job coaches for longer-term maintenance support of individuals involved in supported employment is one way to maximize the cost-effectiveness of supported employment. Because job coaching was never intended to involve the longer-term provision of anything other than a very modest level of on-the-job supports, the costs associated with job coaching were deemed reasonable when factored over the life of someone's supported employment experience. Yet, for a variety of reasons including those associated with making supported employment accessible to people with more significant disabilities, we know that job coaching is also being used to provide longer-term maintenance supports where fading has been maximized and an individual still needs a certain level of paid, on-the-job support to satisfactorily perform his/her job duties. While modest levels of job coaching provided on this basis is likely to be cost-effective, higher levels of job coaching become much harder to justify as cost-effective.
4. Given that job coaching is a specialized position focused on orientation, training and initial stabilization in the workplace, including engaging the involvement and support of supervisors and co-workers starting the first day on the job, it makes sense that we think about the longer-term maintenance role as something distinct from job coaching. Workplace Personal Assistant is the term we've chosen to describe the longer-term maintenance role.

It is important to note that the Workplace Personal Assistant is not disconnected from the job coach and it is expected that staff hired who are new to supported employment may initially spend time in the role of Workplace Personal Assistant, mentored by one or more job coaches, as a career path to more specialized job coaching.

5. One of the challenges associated with differentiating and dividing the roles of the job coach and Workplace Personal Assistant is the need to have clear guidelines for determining when it is appropriate to transition a supported employee from a job coach to a workplace personal assistant. The following are some suggested guidelines:
 - 1) The supported employee, employer, supervisor, closely involved co-workers and the job coach agree that the supported employee is stable in his/her position, and no change in job duties or expectations is planned in the foreseeable future.
 - 2) The job coach has had adequate time to implement all of the strategies

described above to maximize the job coach's ability to fade, and there has been a period of at least six months without additional fading which suggests that the fading of paid supports has been fully maximized for the individual and employer in question. In most cases, adequate time is likely to be one year or less.

- 3) The focus of the job coach's on-the-job support is to a point where it is primarily focused on partial participation strategies, while systematic instruction or similar strategies are not resulting in the supported employee demonstrating increased independence in satisfactorily completing job duties.
- 4) Natural supports have been leveraged and a request for co-workers or supervisors to offer additional unpaid support to the individual has either been turned down or is not considered reasonable, given the workplace culture and existing responsibilities of the supervisor and co-workers.

When these circumstances exist, it makes sense for a Workplace Personal Assistant to replace the job coach. It goes without saying that this transition needs to be well planned and coordinated with everyone involved. There should be a period of overlap where the job coach and Workplace Personal Assistant can be present together so that the job coach can fully brief the Workplace Personal Assistant on the supports the individual needs, including live demonstration where necessary and beneficial. The employer and supported employee should both be comfortable before the job coach fades completely from the role of providing on-going, on-the-job supports.

If, at a future point, the supported employee experiences a change in job duties or some other change occurs that would necessitate re-training or re-involvement of the job coach, this should be possible on a short-term basis. Once stabilization is re-established, the Workplace Personal Assistant would then return to provide the on-going maintenance supports.

Person-Centered Employment Support Plan Team

In this toolkit you will find an Individual Service Plan and Assessment for the Workplace Personal Assistance. The following outlines the planning process in developing and implementing the support plan:

1. The team will include the following individuals:
 - 1) Consumer, family, Workplace Personal Assistant, current Job Coaching staff/agency, employer and/or coworkers when appropriate, Broker or Case Coordinator, others involved in the consumer's work plan.
2. The Team will develop an Individualized Service Plan that can include the following:
 - 1) List of people involved in the plan and the role of each in the consumer's support.

- 2) Current supports being provided at the workplace, their daily routine at the workplace
- 3) Plan to continue supports or personal care services outlining specific times during the individual's workday for these supports.
- 4) Any medical concerns and/or medications that will be needed during the workday.
- 5) Information on previous work experiences and job adaptations that have been successful and unsuccessful.
- 6) Transportation plans.
- 7) Introductory meeting and orientation between Job Coach, employer/coworkers, the consumer and the Workplace Personal Assistant.
- 8) Consumer's Employer Expectations are clear for both the consumer and the Workplace Personal Assistant.
- 9) Back up plan developed if the Workplace Personal Assistant is unable to be at the worksite due to illness, vacation or difficulty filling position.

Business Practices

Sick Leave:	
Full Time:	9 - 8 hour days / year
Part Time	4.5 - 8 hour days / year

Vacation Leave:			
	Years of Service	Hours with Pay Annually - FT	Hours with Pay Annually - PT
	< 1 year	40	20
	1 year	80	40
	5 years	120	60
	10 years	160	80
	15 years	200	100
	20 years	240	120

2010 Workplace Personal Assistant Budget Proposal

Program / Department: _____

Completed by:

Date:

Workplace Personal Assistant Services – Briefly describe proposed services for 2010. Indicate how you will provide the Workplace Personal Assistant Services and how it is consistent with the mission / business needs of your Agency. In later sections of this Budget Proposal you should identify all staffing and specials costs associated with these services.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

New staff positions – Identify the number of positions needed for this program.

Goal #	Position Title	FTE	Proposed Pay Grade	Proposed % of Range	Start Date	2010 Actual Cost - Salary Only (est.)	2010 Annual Cost - Salary Only (est.)	Status Approve-Deny

Special costs – Special costs may be related to the expansion of current operations or proposed new Workplace Assistant Services.

Goal #	Equipment	Furnishings	Type (check) / Specify: Other Other (specify)	Unit Cost	Number	Total Cost	Rationale

2010 Workplace Personal Assistant Budget Proposal
Detail / Discussion Page

Workplace Personal Assistant Services – Provide any additional details / discussion that you consider relevant.

New staff positions – Provide any additional details / discussion that you consider relevant.

Special costs – Provide any additional details / discussion that you consider relevant.

Cost Savings – Provide any additional details/discussion that you consider relevant.

Budget Items – List budgeted request below for these services:

JOB DESCRIPTION FOR WORKPLACE PERSONAL ASSISTANT

BASE WAGE: \$\$\$

I. DEFINITION

The Workplace Personal Assistant is responsible for assisting consumers with disabilities in completing work tasks and/or attending to personal cares while at work. The goal of the position is to promote independence, quality performance and full inclusion of the consumers with disabilities being supported.

II.

III. REPORTING STRUCTURE

The Workplace Personal Assistant reports to the manager and vertically through the administration to the Board of Directors of .

The Workplace Personal Assistant depending on the structure of the agency's direct service staff may report directly to the Job Coach who reports to the manager of the program, or the Workplace Personal Assistant may report directly to the manager of the program.

IV. FUNCTIONS

As needed and as directed in the service plan created with the consumer:

- A. Assist the employed consumer to satisfactorily complete job duties required by the consumer's employer that the consumer is not able to complete independently or with available natural supports.
- B. Provide personal care, meal assistance, emergency response and mobility assistance.
- C. Provide motivational and behavioral supports for the consumer to ensure completion of all job tasks the consumer can do independently and partial participation in all job tasks where the consumer may need assistance.
- D. Identify and facilitate natural supports in the job site to encourage further independence from the Workplace Personal Assistant.
- E. Work with consumer, the Workplace Personal Assistant's work supervisor and the most recently involved job coach to review and update the Workplace Personal Assistant's schedule and duties to enhance the consumer's work performance/productivity.
- F. Provide transportation in an insured and road worthy personal or company vehicle, if applicable.

- G. Inform supervisor of any significant changes with the consumer.
- H. Submit schedules, timesheets, transportation and expense claims to supervisor in a timely manner.
- I. Maintain professionalism and communication with the consumer and worksite personnel.
- J. Implement all policies and procedures.
- K. Attend all state, county and company mandated training as scheduled.

V. RECOMMENDED QUALIFICATIONS

- A. High school diploma, its equivalent, or course work to include basic English (unless serving an individual and workplace where English language proficiency is not required).
- B. Past experience working in Supported Employment Services.
- C. Completed or completes within one or more of the following training regimens:
 - a) Personal Care Worker regulated training
 - b) Required two hour course on Disability Awareness
 - c) Courses to include:
 - (1) Client Rights
 - (2) Standard Precautions
 - (3) CPR/First Aid
 - (4) Medication Administration
- D. Has an acceptable criminal record and background information disclosure.
- E. Has acceptable pre-placement drug screening results (where applicable).
- F. Holds a valid driver's license with an acceptable driver's record, access to a vehicle during work hours, and proof of insurance, if applicable.
- G. Is not listed with the Department of Health Services or Regulation and Licensing or any other applicable state department or agencies with a finding of abuse/neglect/misappropriation of funds/property, if applicable.

The above statements reflect the general details necessary to describe the major functions of the position described and are not intended to be a detailed description of all the work that may be required.

Skills and Competencies Needed to Succeed in Today's Workplace

Because the world of work is changing, the U.S. Departments of Labor and Education formed the Secretary's Commission on Achieving Necessary Skills (SCANS) to study the kinds of competencies and skills that workers must have to succeed in today's workplace. The results of the study were published in a document entitled *What Work Requires of Schools: A SCANS Report for America 2000*. A summary of the findings are provided in the tables below.

Table 1: SCANS' Five Competencies

Resources: Identifies, organizes, plans, and allocates resources

- **Time** - selects goal-relevant activities, ranks them, allocates time, and prepares and follows schedules
- **Money** - uses or prepares budgets, makes forecasts, keeps records, and makes adjustments to meet objectives
- **Material and facilities** - acquires, stores, allocates, and uses materials or space efficiently
- **Human resources** - assesses skills and distributes work accordingly, evaluates performance and provides feedback

Interpersonal: Works with others

- **Participates as member of a team** - contributes to group effort
- **Teaches others new skills**
- **Serves clients/customers** - works to satisfy customers expectations
- **Exercises leadership** - communicates ideas to justify position, persuades and convinces others, responsibly challenges existing procedures and policies
- **Negotiates** - works toward agreements involving exchange of resources, resolves divergent interests
- **Works with diversity** - works well with men and women from diverse backgrounds

Information: Acquires and evaluates information

- **Acquires and evaluates information**
- **Organizes and maintains information**
- **Interprets and communicates information**
- **Uses computers to process information**

Systems: Understands complex interrelationships

- **Understands systems** - knows how social, organizational, and technological systems work and operates effectively with them
- **Monitors and corrects performance** - distinguishes trends, predicts impacts on system operations, diagnoses deviations in systems performance and corrects malfunctions
- **Improves or designs systems** - suggests modifications to existing systems and develops new or alternative systems to improve performance

Technology: Works with a variety of technologies

- **Selects technology** - chooses procedures, tools, or equipment including computers and related technologies
 - **Applies technology to task** - understands intent and proper procedures for setup and operation of equipment
 - **Maintains and troubleshoots equipment** - prevents, identifies, or solves problems with equipment, including computers and other technologies
-

Table 2: A Three-Part Foundation of SCANS Skills and Personal Qualities

Basic Skills: Reads, writes, performs arithmetic and mathematical operations, listens, and speaks

- **Reading** - locates, understands, and interprets written information in prose and in documents such as manuals, graphs, and schedules
- **Writing** - communicates thoughts, ideas, information, and messages in writing; and creates documents such as letters, directions, manuals, reports, graphs, and flow charts
- **Arithmetic/mathematics** - performs basic computations and approaches practical problems by choosing appropriately from a variety of mathematical techniques
- **Listening** - receives, attends to, interprets, and responds to verbal messages and other cues
- **Speaking** - organizes ideas and communicates orally

Thinking Skills: Thinks creatively, makes decisions, solves problems, visualizes, knows how to learn, and reasons

- **Creative thinking** - generates new ideas
- **Decision making** - specifies goals and constraints, generates alternatives, considers risks, and evaluates and chooses best alternatives
- **Problem solving** - recognizes problems and devises and implements plan of action
- **Visualizing** - organizes and processes symbol
- **Knowing how to learn** - uses efficient learning techniques to acquire and apply new knowledge and skills
- **Reasoning** - discovers a rule or principle underlying the relationship between two or more objects and applies it when solving a problem

Personal Qualities: Responsibility, self-esteem, sociability, self-management, integrity, and honesty

- **Responsibility** - exerts a high level of effort and perseveres towards goal attainment
- **Self-esteem** - believes in own self-worth and maintains a positive view of self
- **Sociability** - demonstrates understanding, friendliness, adaptability, empathy, and politeness in group settings
- **Self-management** - assesses self accurately, sets personal goals, monitors progress, and exhibits self-control
- **Integrity/honesty** - chooses ethical courses of action

Tables excerpted from *What Work Requires of Schools: A SCANS Report for America 2000*, U.S. Department of Labor, June 1991, pp. xvii-xviii.