

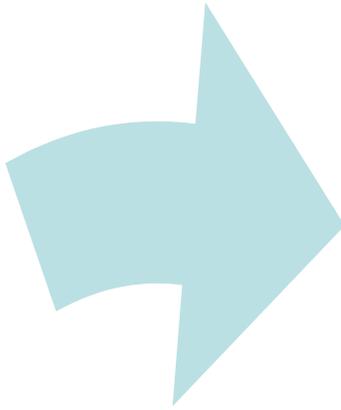
POLICIES AND PAPERWORK FOR EMPLOYERS OF PERSONAL ASSISTANTS

BURY ADULT SOCIAL CARE

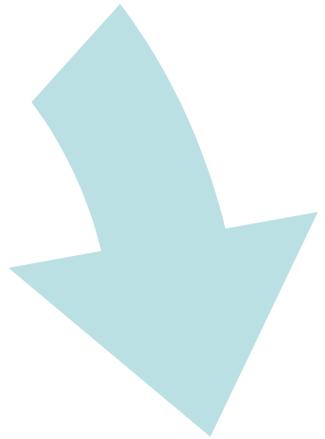


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1.
Finding Your
Personal
Assistant and
ensuring they
meet Your
Requirements



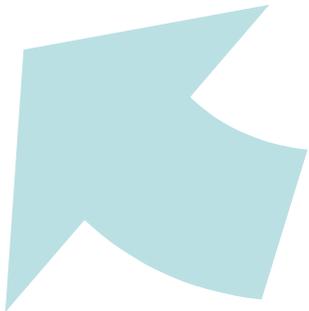
2.
Staying Legal
and Managing
Your Personal
Assistant



3.
Dealing with
Difficult
Situations



4.
Miscellaneous
Employment
Matters



5.
Supporting
Your Personal
Assistant's
Future



**THE
PERSONAL
ASSISTANT
EMPLOYMENT
CYCLE**

Policies and Paperwork for Your Personal Assistant

BEFORE YOU BEGIN

Before you begin...

Becoming an employer is an exciting prospect which should enable you to have more choice. You will be able to recruit who you want, at the times you need, to fulfil your specific care requirements. Employing your own Personal Assistant or Assistants should be an empowering new way of life which will enable you to maintain your independence and live your life as you wish.

This guide has been written to help you look after your Personal Assistant as an employee. It is also designed to increase your chances of having the best possible outcomes as an employer. It also describes some potential pitfalls and gives you guidance on how to safeguard yourself as an employer and handle these situations.

This guidance is split into two complimentary sections that are colour coded for ease of use. The first is Policies which provides an explanation on why you need to consider these issues when employing a person. The second is user-friendly Paperwork to assist you in employing someone. This Paperwork will allow you to maintain employer records and ensure that your employee or employees feel valued. Within this section there are also useful links and addresses where you can gain more information.

Additional Paperwork is available by telephoning 0161 253 7676 or emailing burygems@bury.gov.uk or, should you have computer access and wish to print the documentation, it can be found on the Bury Care Website link www.adultsocialcarejobsbury.co.uk under Personal Assistant information where each item is linked for ease of access.

DISCLAIMER

All the information is given as employment guidance ONLY and no liability is accepted by the Council or any member or officer of the Council for any inaccuracies contained in this guidance.

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POLICIES

FOR

YOUR

PERSONAL

ASSISTANT

Finding Your Personal Assistant and ensuring they meet Your own Individual Requirements

1.1 What are my requirements?

Once you have decided that employing a Personal Assistant is the route you wish to take, you need to consider the hours you need covering and how much money there is in your package to support this. You may need more than one person to cover various shifts. It is worth remembering that you need to pay at least the minimum wage per hour to your employee but you may decide to pay more.

This level of payment is of course your choice but this may have an adverse impact on the amount of hours that you are able cover within your budget. Please remember that your employee is entitled to:

- ❖ a 20 minute break once they have worked a 6 hour shift.
- ❖ work no longer than 11 consecutive hours in any 24 hour period
- ❖ have at least one day off each week – that is, one day off out of seven.

You must not ask your personal assistant to work an average of more than 48 hours per week, unless they have given their voluntary consent in writing.

There are additional regulations you need to consider when employing a young person between 16-18.

- ❖ The maximum working week for this age group is 40 hours, other than in exceptional circumstances.
- ❖ These hours may not be averaged out and there is no opt out available.
- ❖ If you employ someone within this age range you must also give them a break of 30 minutes for every four and a half hours worked.
- ❖ They must also have a rest period of 12 hours between each working day and two days off per week.

In **Paperwork 1.1** a chart is included with the current minimum wage and also a Personal Assistant Cover Chart where you can simply work out how much your care needs will cost you per week.

1.2 Finding the right person Job description and Person Specification

After you have thought about your requirements regarding care cover you will then need to think about the tasks you wish your Personal Assistant to undertake for you. This can be written on a job description. It is also important for you to consider what qualities are important for you in a person. This can be written on a Person specification. Examples of a simple combined document can be found in [Paperwork 1.2](#) with blank copies for you to use. Filling these documents in, however briefly, will enable you to successfully advertise your requirements and interview interested candidates with the confidence that they know your requirements. There should be no surprises with regards to the skills and personal qualities you require when they come to work for you.

1.3 Advertising Methods and Website matching.

Unless you already have someone you wish to employ, such as a member of your family, you will need to advertise your requirements. Your Job Description and Person Specification will help you to do this and will enable you to gain more interest from a larger number of candidates. This advertising can be done in a number of ways. The free ways of advertising in the Borough are;

- ❖ **At a local job centre.** Address, links and telephone numbers of the local Bury Job Centre can be found in [Paperwork 1.3](#). The staff there should help you to write a suitable advert. It would be helpful to them if you could provide details of the hourly rate that you wish to pay and the requirements for your Job Description and Person Specification. You can either ask your candidates to complete a job centre application form or ask them to complete one you have written yourself. You may wish to use the sample application form in [Paperwork 1.3](#).
- ❖ **On the Bury Social Care Website.** This website allows you or Bury Adult Care Services on your behalf to input your requirements. It also allows people interested in becoming a Personal Assistant to advertise their availability. With availability of suitable candidates you can be matched with them and by mutual consent, details will be forwarded to you so that you can arrange to interview them. Further information about this process

can be found in [Paperwork 1.3](#). For support with this process contact [Bury GEMS](#) on 0161 253 7676.

There are other ways to advertise jobs, for example in a newspaper or within private advertising space such as on notice boards within shops. There is often a charge for these types of advertisement and they may not reach as many people as a job centre or website advertisement. If you have very specific cultural or religious needs it might also be useful for you to advertise within your own community settings to capture people who share similar values.

When preparing an advert you should take care to ensure that the qualities that you ask applicants to have would not unfairly disadvantage a particular group of people. For example, it may not be fair to ask that applicants are a particular age or gender. In some circumstances it can be appropriate to specify certain occupational requirements. For example a person of a particular gender may wish to have someone of the same gender delivering their personal care. Unfairly disadvantaging a particular group could be discriminatory so always construct your advert with this in mind and seek advice if you are unsure.

1.4 Setting up interviews.

It is important that you think about the venue where you wish to interview and who will be there to assist you. For your own safety, even though you might be very comfortable with the process, it is advisable that you do not interview on your own or interview at your home address.

As you are inviting members of the public to meet you it might be beneficial for you to use one of the rooms at the local job centre or to contact the Direct Payments team who will locate a room that you can use for this purpose. Their phone numbers are listed in [Paperwork 1.4](#).

Letters inviting candidates for interview are in [Paperwork 1.4](#), but you may choose to telephone or email them instead. It is important that you protect your privacy and confidentiality when engaging with members of public who you do not know. Until you are in a position to make an offer of employment, you may choose to use a P.O. Box address. There is an initial cost to arrange this but it will ensure you are protecting your identity at this stage of the process.

To set up a PO Box go to:

www.royalmail.com/portal/rm/customerservice2?catId=69800737&mediaId=71700716 or phone 0845 950 950.

Should candidates fail to meet the criteria described in your advertisement you may wish to write to them advising that they have not been selected for an interview. A copy of a suitable letter is contained in **Paperwork 1.4**.

In order to ensure you can differentiate between candidates and make a decision it might be useful to have another person with you to take notes. Your interview needs to be structured simply. You may wish to use this process:

- ❖ **Welcome** - It is important for you to make your candidates feel comfortable and welcome as some candidates may not have had an interview for some time and be extremely nervous. Try to put them at their ease and then set the scene as to why you wish to recruit.
- ❖ **Ask** - This is your opportunity to ask the questions relevant to the job. Use your Job Description and Personnel Specification to do this. An example of some questions is included in **Paperwork 1.4**.
- ❖ **Supply Information** - This is your opportunity to give information for example rate of pay, hours of work and benefits.
- ❖ **Part** - Ensure you thank the person for attending your interview and ask them if they have any questions. Let them know when you will advise them of the outcome.

1.5 **Staying safe – references, employment checks and insurance**

After you have interviewed and decided which candidate you wish to employ there are a number of checks that you should carry out. Whilst none of these safeguarding tools are completely water tight they will allow you to have some degree of security when employing someone to come and work with you in your home.

References

You should ideally ask for two references for the person you have interviewed and wish to recruit. These referees will be stated on the application form. It is advisable that you get these references and are happy with their content before you offer employment. An example of a reference letter is included in **Paperwork 1.5**. It is important that you verify these references by telephone once you have received them in order to check their authenticity.

Criminal Records Bureau

It is also advisable that you get a Criminal Records Bureau (CRB) check for the person you are employing. These CRB checks help you to know whether the person you are employing has any criminal convictions. Your self directed support may be refused should a potential employee be deemed a risk and so unsuitable. If your personal assistant will be caring for you when children are in the house then a CRB check is essential. Even if there are not children in the house you should think very seriously about gaining a CRB check for your employee even if they are a family member or long term friend. The CRB form is available by telephoning either the Direct Payments Team on 0161 253 7366/7401 or Bury GEMS on 0161 253 7676. They need to be returned to the Direct Payments Team who will assist your candidate to complete the relevant sections.

It is your personal assistants responsibility to provide you with a copy of their CRB check and, in line with recent changes in Social Care requirements, it is good practice to ask your employee to have registration with the Independent Safeguarding Authority (ISA). This is a one off payment made by the employee and which is transferable to any Social Care role and setting. The roll out of this scheme is currently being updated as of June 2010 and any further developments will be communicated by the updates on the Personal Assistant pages of www.adultsocialcarejobsbury.co.uk.

Insurance

You also need to ensure that you have employer's liability insurance in place when you are employing someone. There are a number of companies who provide this and offer cover at different levels which is of course reflected in the premium paid.

A list of insurance providers is listed in [Paperwork 1.5](#). This list is not exhaustive and there are many other insurance providers that can be found on the internet. You must choose the level of cover you feel is necessary for your own situation. A higher premium is usually payable should you wish to have employment law cover.

Right to Work in the UK

Your Personal Assistant must be entitled to work in the UK in line with the Asylum and Immigration Act 1996. To ensure they have this entitlement you need to ask them to provide one of the following, either in person by post, prior to their start date,

- a) A passport describing you as a British citizen or a national from an EEA (European Economic Area) country or otherwise entitled to work in the UK.
- b) A birth certificate issued in the UK or the republic of Ireland.
- c) A letter from the Home Office confirming that you are allowed to work in the UK.

You will also need a national insurance number. This can be found on one of the following documents,

- a) A payslip from previous employment in the United Kingdom.
- b) A P60 or P45.
- c) National Insurance Card.

Failure to provide this documentation prior to their start date may result in you being unable to recruit them. It is important that you keep a copy for your records.

An Interview and A Right to Work in the UK checklist is included in [Paperwork 1.4 and 1.5](#) which act as useful tools to enable you to

keep on track with the process from start to finish and will enable you to formulate appropriate questions and ensure you have gathered and had sight of the correct documentation.

1.6 Offering a job

It is really important you let your candidates know if they have been successful or not. This can initially be done by telephone. You may wish to wait for references or checks before you offer employment or you may wish to offer your job conditionally, that is, on the satisfactory receipt of them.

It is also important that you follow up your verbal offer over the telephone with a letter. An example of an offer letter is included in **Paperwork 1.6** which you may choose to use.

It is also good practice to let those people who have not been successful know and there is also a sample letter for this purpose within **Paperwork 1.6**.

Staying Legal and Managing Your Personal Assistant

2.1 Legally expressing my needs and covering my requirements

All employers should provide their employees with various pieces of information which bind the employment relationship together. Once you have offered the job you need to provide your Personal Assistant with a contract of employment. This needs to be completed as soon as possible and no later than two months from the date they start work for you. This will not only provide your Personal Assistant with valuable practical information such as their rate of pay and hours of work but it will also make sure they feel valued and confident that they have entered into a professional working relationship with you.

In **Paperwork 2.1** you will find a copy of a Contract of Employment which you can complete. It is carbonised so that all you need to do is complete the relevant sections and give one copy to your Personal Assistant. Should you have a computer these documents can be found on the Bury Care Website as printable versions. This link can also be found in **Paperwork 2.1**. Don't forget to sign and date these documents and one copy should be retained on your records and one passed to your Personal Assistant for them to keep.

This contract has various sections which you will need to complete. In **Paperwork 2.2** there are complimentary charts which will assist you in this process (such as a holiday calculator and notice information which will enable you to provide your Personal Assistant with the correct entitlement).

There are also self explanatory paragraphs within the contract which will enable you to describe what you are offering as an employer, most of which is governed by employment law.

- ❖ The Contract of Employment covers these items:
- ❖ Your name and address
- ❖ Your Personal Assistant's name and address
- ❖ Commencement of Employment
- ❖ Main place of work
- ❖ Job title
- ❖ Duties and responsibilities
- ❖ Probationary Period

- ❖ Hours of Work
- ❖ Lateness
- ❖ Salary
- ❖ Pension
- ❖ Time Sheets
- ❖ Holiday Entitlement
- ❖ Holidays
- ❖ Sickness Leave
- ❖ Hospital stays
- ❖ Notice of Termination of employment
- ❖ Health and Safety
- ❖ Confidentiality
- ❖ Grievance Procedure
- ❖ Disciplinary Procedures
- ❖ Dismissal

There are additional paragraphs listed below which may or may not apply to your needs. If you have a computer and are using the computerised contract delete the ones you do not require. If you are using the carbonised contracts in the Paperwork pack please add the additional items at the bottom of the contract.

These additional paragraphs cover:

- ❖ Smoking – it is your decision if you allow someone to smoke in your home. You need to state your requirements.
- ❖ Transport - You need to consider business insurance cover and continuation of employment should your Personal Assistant lose their driving licence for some reason.
- ❖ Meals on duty – You need to decide if you are going to provide meals for your Personal Assistant during their working shifts.
- ❖ Working overseas- You need to consider if you wish your personal assistant to travel abroad with you.

These additional items should not be a surprise to your candidate as they already should have been stated in your Job Description and Person Specification as essential requirements.

All of these items are in a contract for a reason: to protect yourself but also the employment rights of the Personal Assistant you are employing.

By providing this information in this format you will not only be staying legal but also communicating well by giving information in a concise way to your employee. This has many benefits and should enable you retain your Personal Assistant because they feel you are treating them fairly and professionally.

Please remember to sign both copies and ask your Personal Assistant to do this too and retain a copy for your records.

2.1 Paying my Personal Assistant

Record Keeping

You should have already agreed an hourly rate to pay your employee and this will be shown on the contract of employment. In this section we will look at how to pay them. You will need to keep all paperwork associated with paying your Personal Assistant. This includes, bank statements, remittance advice slips from Bury Council, payslip reports, cheque stubs (if necessary), agency invoices, and anything else that relates to this.

HM Revenue and Customs (HMRC) advise that records relating to the payment of wages are kept for a period of 5 years. This applies to both your Personal Assistant and yourself.

Payment methods and Tax and National Insurance

There are a number of ways to arrange payment for your Personal Assistant. The easiest way is through a pay agency that will manage your payroll for you. This will mean you have very little administration to do and your Personal Assistant will be provided with itemised payslips. There is a cost for this service and a number of providers are listed in **Paperwork 2.3**.

You may wish to use an accountant or bookkeeper as an alternative to payroll provided by a pay agency. This is your choice although many will charge over and above the administration cost of agencies. It will be beneficial to consider this before you decide how to most effectively and efficiently administer pay to your Personal Assistant. Regardless of how you choose to administer this pay your Personal Assistant is entitled to written itemised pay statements/slips by law detailing what they have been paid.

The easiest way by far is to use a pay agency who will give you the peace of mind that everything that is required of you as an employer has been actioned correctly.

Self Employed Personal Assistants

The Personal Assistant you wish to employ may request to be self employed and so wish to have their own arrangements for paying their tax and national insurance contributions. This is not advisable as there are many HMRC complexities involved and it is also not the preferred option of Bury Council via which your support is agreed and funded.

In addition, if someone chooses to be self employed they are not then classed as an employee. As a result you may not be able to manage them using the processes and procedures within this pack as these are designed for employees, not people who are self employed. The legislation which is in place which determines whether someone is self employed or an employee can be highly complex and it is therefore not advisable to have a self employed PA unless you have specific expertise available to you around self employment.

Should you wish to consider this route you need to speak to an advisor in the Direct Payments team who will pass your request to the panel who will agree your funding and budget. Only after very careful consideration and stringent verification of the processes you have in place will this be allowed. If it is deemed not to be working, the Council reserves the right to temporarily suspend your funding whilst you agree a different payment method.

Should you wish to employ a self employed person you must consider the following;

- ❖ There would be an expectation that the Personal Assistant would need to produce several pieces of vital documentation which could prove their Self Employed status, Public Liability Insurance and NI/TAX contributions.
- ❖ You as an employer would need to put an invoice system into place. There is pro-forma invoice template in **Paperwork 2.3** that you could use for invoicing your self employed Personal Assistant. This template has a declaration section which clearly indicates that the individual understands that they are responsible for their financial contributions to the Inland Revenue. This invoice would need to be completed on a weekly basis, signed off by both your

Personal Assistant and yourself. Once this has been done copies of this form need to be sent to the Direct payments Team, Inland Revenue and a copy for your own audit trail.

- ❖ You must ensure that all your self employed employees are registered with the Self Assessment division of the tax department.

2.3 Looking after my employee

It is important to ensure your Personal Assistant remains safe and that you do a risk assessment of your home together. A sample Risk Assessment and Safety in the Home checklist is contained in **Paperwork 2.3**.

Once you have given your Personal Assistant their contract and set up payment to them, you should then begin to build a mutually beneficial employment relationship that will last for many months or maybe even years to come. It is worth creating open channels of communication and a positive culture where you can get together once a week for an informal chat where any problems are discussed before they are taken out of all proportion.

The next sections give you ideas of what to do if your situation changes or the person you have employed is not suitable.

Hopefully if you have managed stages 1 and 2 well this will not happen.

3. Dealing with Difficult Situations

Sometimes things can go wrong. Even if you have had the best of intentions and given your Personal Assistant a contract and formally recruited them you may both or individually decide that the employment relationship is not working. Your Personal Assistant may not turn up for work without explanation, or be sick for a long period of time or do something that breaks down the trust you have in them. Your Personal Assistant may have issues that cannot be resolved by just talking informally. In these situations you need to manage the situation properly. You may ask a friend or relative to help you. There are a number of other channels you can gain help and legal advice. There are right and wrong ways to handle such issues and plenty of helpful guidance around to support you when you are faced with a difficult or a sensitive situation.

3.1 The official channels

Insurance and ACAS

Employment Law Insurance cover would provide advice and solutions and would cover you with some legal advice should something go wrong. Obviously these types of insurance cover are more expensive than the basic cover as listed in **Paperwork 1.5** but they do provide cover should you need assistance in managing difficult employment issues. This list is by no means exhaustive but it will give you some pointers as to the kinds of cover available. Other providers can be found on the internet. You would have to fund this insurance cover yourself out of your Self Directed Support package and as with the rate of pay you decide to offer, it is entirely your decision as to what level of cover you choose.

Should you decide not to pay for insurance cover there are a number of other free advisory bodies which may be able to offer you assistance. These are ACAS and the Citizen's Advice Bureau. They will not represent you in legal proceedings and it is worth remembering this when weighing up the pro and cons of whether or not to pay a higher insurance premium. The links and addresses of these two organisations are included in **Paperwork 1.3**.

3.2 When your Personal Assistant has a complaint

Many times when there are employment issues they can be dealt with at the lowest possible level and informally. If you are having regular chats with your Personal Assistant then you should be well aware if there are any potential issues arising which you should try to work through together. Occasionally these issues can become a complaint or in employment terms a 'grievance'.

It is worth remembering that in any relationship there can be glitches and it is usually worth working through issues if you can.

However, sometimes this is not possible and the issues sometimes need to be dealt with formally. If your Personal Assistant says that they wish to make a complaint ask them if they wish the matter to be dealt with informally or formally.

If they say they wish to deal with the matter informally make time to speak to them and listen carefully to what they are saying and what problems or issues they feel they are experiencing. Sometimes this is all that needs to happen and the matter can then be easily resolved.

However, sometimes this is not possible and if they wish the matter to be dealt with formally you need to ask them to put their complaint or grievance in writing. You need to respond using the documentation in **Paperwork 3.2**. This documentation allows you to record the details of the meeting or meetings you have with your Personal Assistant. You should ask them to sign the documentation and give them a copy. It is important for you to keep a copy for your records. Should you not have access to a computer to print these forms some carbonised paper copies are included in your Paperwork Pack.

It might be beneficial for you to have a third party present to support you in this meeting and you must also allow your Personal Assistant to be accompanied too. These types of meetings do not need to be confrontational but should enable each of you the chance to express your concerns and hopefully work towards a satisfactory outcome and allow you to move forward towards a better way of working together.

It is important that if your Personal Assistant leaves your employment that you ask for their reasons for leaving in an exit interview questionnaire. A copy of an Exit Interview Questionnaire can be found in **Paperwork 3.2** which should be completed whilst they are working their notice or failing this should be sent to them when they leave your

employment. If people take the time to complete these forms they usually tend to offer constructive feedback which may assist you to recruit someone even more suitable next time. It is good practice to also send out a stamped addressed envelope to encourage them to return this feedback to you.

When you need to manage conduct issues

Even with the best processes in place you may have employed someone who does not meet your expectations. This may be due to conduct issues. Their behavioural issues may have been so serious that your employment relationship is broken and you can no longer continue to employ that person to care for you. Other issues may be that your Personal Assistant fails to fulfil their contract of employment due to sickness absence or they may fail to turn up for work and not inform you of their whereabouts. In all of these cases these people need to be managed properly and in line with current legislation.

If you follow procedures you are more likely to have a more positive and less stressful resolution to these situations.

This next section is split into separate sections as they need to be dealt with differently. There is supporting documentation in **Paperwork 3.3** or you can contact your insurance helpline, ACAS or the Citizen's Advice Bureau who might be able to offer you advice.

Misconduct

Misconduct is the term used to describe negative behaviours or incidents which affect the employment relationship between employer and employee. Your Personal Assistant might have misconduct issues that could include lateness, not following instructions, not abiding by your wishes or not respecting your home and possessions. There are many other circumstances which fall within this category.

This person may just need to be informed informally that their behaviour is not acceptable or appropriate. This could be done by you having an informal discussion with them. There may be mitigating reasons why their behaviour has changed and an informal discussion might be all that is required.

However, the matter may be more serious and after investigating the facts of what has happened you may feel that it needs to be dealt with formally. You may decide it is a disciplinary matter and feel it is necessary to issue your employee with a warning for misconduct which hopefully will remedy the situation so that no further action needs to be taken in the future and your employment relationship can get back to where it was before the issue. At this stage you do need to make it clear to your employee that any further misconduct issues could ultimately lead to their dismissal.

The stages of warning are listed with timescales and the supporting paperwork ready for use. This can be found either on the carbonised forms within **Paperwork 3.3** in this pack or on the website.

If you are considering dismissal it is advisable that you gain employment law advice either from your insurer or from ACAS before doing so. There is a copy of a dismissal form in **Paperwork 3.3/3A** along with a brief disciplinary checklist. If you decide to dismiss your Personal Assistant after going through this procedure then you must allow them the right of appeal. There is a simple process for this and an appeals checklist is contained in **Paperwork 3.3**.

It is crucial that you have a third party available at any meetings to take notes and act as a witness. It is also good practice that your Personal Assistant is that they can be represented too.

If you dismiss on the grounds of misconduct you will need to pay your Personal Assistant notice pay. The amount of notice pay is as stated in the contract of employment as listed in **Paperwork 2.1**. The normal

notice pay would be 1-4 weeks notice but may be more due to length of service. (One week for every year of completed service up to a maximum of 12). They would also be entitled to any accrued holiday pay for holidays that have not been taken.

Gross Misconduct

There are types of misconduct that are so serious that they are termed Gross Misconduct. The relationship between both you and your Personal Assistant might be so fragile that whilst the alleged Gross Misconduct is being investigated they may need to be suspended. During this suspension they will need to be paid so it is in your best interests to ensure this investigation happens without delay. Any decision to dismiss should only be taken after a full investigation. If after investigation it is confirmed that the employee has committed one of the following offences (the list is not exhaustive) they would normally be summarily dismissed, which means without any notice pay:

- ❖ Fraud and deliberate falsification of records
- ❖ Theft
- ❖ Physical violence
- ❖ Serious bullying or harassment
- ❖ Deliberate damage to property
- ❖ Serious insubordination
- ❖ Bringing the employer into serious disrepute
- ❖ Serious incapability whilst on duty brought on by alcohol or illegal drugs
- ❖ Serious negligence which causes or might cause unacceptable loss, damage or injury
- ❖ Serious infringement of health and safety rules
- ❖ Serious breach of confidence (subject to the Public Interest (Disclosure) Act 1998)

Do ensure they are paid any outstanding holiday pay that they have accrued up to the date of leaving.

There is a copy of a dismissal form in **Paperwork 3.3/3B** along with a disciplinary and appeals checklist.

In order to protect yourself you should seek additional advice from your insurer, or ACAS and always have someone in the meetings to take notes and to support you. This offer of representation must also be extended to your employee. If you decide to dismiss your Personal

Assistant after going through this process then you must allow them the right of appeal.

Step 1

Give a written statement to your Personal Assistant

You must give your Personal Assistant a written statement setting out the conduct that has resulted in the dismissal and informing them of the right of appeal against the decision to dismiss.

Step 2

Appeal against the disciplinary decision

If your Personal Assistant wishes to appeal they must inform you. A meeting must be held. You must inform your Personal Assistant of your decision following the meeting.

Absent with out Leave (AWOL)

If your Personal Assistant fails to turn up for work without any explanation or making any prior arrangements with you this is called being absent with out leave. This could put you in a very difficult situation particularly if you are depending on that person to assist you with personal care at very prescribed times during the day. Clearly this is not a situation that can be tolerated and you will need to manage this situation.

There are a number of steps you will need to follow in order to manage this situation. Firstly you should try to telephone them and ask why they have failed to report for work. They may have had an emergency themselves that they have needed to respond to and be very apologetic about the whole situation.

However, if they fail to respond to your telephone call write to them using the letter in **Paperwork 3.3/3C**. If they fail to respond write to them again using the letter in **Paperwork 3.3/3D** and if you do not receive a response you will need to issue them with a dismissal letter. Please see **Paperwork 3.3/3A** which has an example which you may choose to use.

If they do actually resume work you need to manage the situation below;

- ❖ If they then report for work again you should in the first instance issue them with an informal counselling letter. See **Paperwork 3.3**.
- ❖ If they are absent without leave again you should invite them to a disciplinary meeting and issue them with a Final Written Warning using the disciplinary warning form in the misconduct section unless they describe mitigating reasons for their none attendance and notification of their absence. In **Paperwork 3.3/2** is the form you should use to record this.
- ❖ If they are absent again and no mitigating reasons are presented you may decide to dismiss them. The reason for dismissal should be 'absent without leave' and list the specific date/s of none attendance. If they fail to attend this meeting the decision can be made in their absence but do still confirm your decision in writing to them. **Paperwork 3.3/3A** is the appropriate form and wording for a letter to record this decision.
- ❖ As in all other dismissal situations your Personal Assistant should be given the right of appeal. If they fail to attend this appeal meeting the decision can be made in their absence but do still confirm your decision in writing to them.

3.3 When you need to manage sickness issues

You may be faced with a situation when your Personal Assistant takes time off from work due to sickness. This might be short sporadic periods of sickness or prolonged absences. Whilst you might be able to support this absence for a short period of time it will need to be managed as the person will be failing to fulfil their contract of employment and you will probably only have limited resources to cover their absence.

When your Personal Assistant begins work you might find it useful to give them the Sickness Absence Agreement Checklist and ask them to sign a copy to say that they have received it and understand your expectations and what will happen with regards to their pay and possible continued employment should they be off due to sickness absence. This can be found in **Paperwork 3.4**.

It is also important that they understand that their employment may be terminated should your own care arrangements and support package need to be changed due to your own health situation. There may come a time when self directed support and employment of a Personal Assistant is no longer the best option for you.

3.3 Ending the employment relationship

Notice

Many people will decide to leave your employment after having enjoyed the experience and they might continue to have contact with you as a friend. In such cases they will resign by giving you the appropriate notice. This will be the notice as stated in their contract of employment. Please see **Paperwork 2.1** where the notice from the employee is stated in the section called 'Termination of Employment'. In order for you to gain feedback you may find it useful to ask them to complete a brief Exit Interview Questionnaire which is contained in **Paperwork 3.2**.

Redundancy

You may no longer require a Personal Assistant as your care needs may have changed. As the job is now redundant you would need to dismiss your Personal Assistant on the grounds of Redundancy. A redundancy calculator is contained in **Paperwork 3.5**. This calculation is based on service and age and is a statutory payment. Your Personal Assistant must have at least 2 years service with you since reaching 18 years to claim a payment of this kind. Should your Personal Assistant be made redundant you will need to contact Bury GEMS on 0161 253 7676 or ACAS on 08457 474747 who will signpost you to the correct procedures and explain how this should be funded and give you guidance as to the best way to ensure you are acting within the law.

Miscellaneous Matters

There may be an occasion when your Personal Assistant approaches you with a request that you do not know the answer to or have experience of. You may be faced with an unusual situation and at least

by thinking through various scenarios it will enable you to be prepared and at least have some pointers as to how to deal with ad hoc situations. This section is split into two sections; Finding solutions to unusual requests and situations and Protecting yourself.

4.1 Finding solutions to unusual requests and situations

Your Personal Assistant might ask you about time off for various reasons. This list is not exhaustive but some of these reasons are listed below with a brief description and a contact list and links are contained in **Paperwork 4.1**.

Sickness absence

If your Personal Assistant goes off sick they should follow the Sickness Absence Agreement checklist as listed in **Paperwork 3.4**. They can self certify for 7 calendar days and after this time they need to provide you with a doctor's note. They will be able to claim Statutory Sick Pay and a claim form can be collected from a Post Office.

It is important that your Personal Assistant is fit for work and that they are not putting you at risk in any way due to the nature of what they have been absent with such as an infectious disease.

Maternity and Adoption

If your Personal Assistant lets you know that they are expecting a baby or adopting a child after first congratulating them you will need to consider various issues and contingencies so that your level of support is not affected. You need to ensure you risk assess their role if they are pregnant. If their job involves heavy manual handling the job role may pose a threat to their well being and you may both need to decide how you will manage your usual day to day activities. This might mean you need to recruit someone else who is able to do these specific tasks for you.

All women who are expecting a baby or parents adopting a child are usually eligible for maternity or adoptive leave and some form of payment which would be in the form of statutory maternity pay or allowance which is dependent on whether their average weekly earnings and national insurance contributions meet the payment criteria. If your Personal Assistant remains in your employment you will then need to decide who you wish to employ to cover their

maternity or adoption leave which could be for up to 12 months from when they go on leave.

Should your Personal Assistant be expecting a baby or adopting a child you will need to contact Bury GEMS on 0161 253 7676 or ACAS on 08457 474747 who will signpost you to the correct procedures and how this should be funded and give you guidance as to the best way to ensure you are acting within the law.

Paternity leave/Adoptive leave

This is the term given to time off for adoptive parents or those with parental responsibility for a new baby. You may be asked by your Personal Assistant for time off to support their partner. This leave applies to people in same sex relationships. Your Personal Assistant needs to give you adequate notice and the leave of up to two weeks must be taken within the first 56 days of either the child's birth or adoption. Your Personal Assistant will be able to be paid 2 weeks statutory paternity pay (SPP) as long as their average weekly earnings and national insurance contributions meet the payment criteria.

Should your Personal Assistant wish to take this time off to support their partner and new family arrangements you will need to contact Bury GEMS on 0161 253 7676 or ACAS on 08457 474747 who will signpost you to the correct procedures and how this payment should be funded and give you guidance as to the best way to ensure you are acting within the law.

Holidays

In **Paperwork 4.1** there is a Holiday request form you may wish to use to enable your member of staff to book holidays. In order that you can forward plan for your Social Care cover you may find it useful to ask for at least 4 weeks notice of holiday dates and state that you do not wish your Personal Assistant to take more than 10 working days consecutively. It is also good practice to respond in writing either allowing or declining the holiday leave within 7 calendar days. A tear off slip is provided at the bottom of the Holiday Request Form for this purpose. All holiday payments are already built into your care package and associated budget.

Sensitive reasons for needing to authorise time off work

On occasion you may need to allow your Personal Assistant some time off to deal with matters that are often out of their control. Such requests might include;

- ❖ Bereavement Leave that may be used for when a friend or relative has died. They may need several days off work or just a few hours to attend a funeral.
- ❖ Compassionate Leave that may be used to assist a close relative who is very ill and there is a need for them to visit or stay with them at hospital.
- ❖ Emergency Leave which may be for a Personal Assistant who has had a flood in their home or who can not travel to work due to severe weather or a car breakdown. They may have a child who is ill and who can not attend school and they need to take time off to look after them.
- ❖ Study Leave or leave for other personal reasons can usually be more planned than these other reasons and you may be able to grant holiday leave or unpaid leave or a temporary change to working pattern to assist them with these requests.

In all of these cases it is your decision as an employer how much time you allow them to have off. There is no legal requirement to pay for these types of request and you will in most cases have to pay for additional cover whilst this person is unavailable.

It is worth remembering that if you treat your member of staff well and show them sensitivity when they are experiencing personal difficulties they are more likely to stay working with you and feel valued. Try to be as flexible as possible and always try to respond positively to such requests.

4.2 Protecting yourself

If you feel that you are being abused by your Personal Assistant you need to tell someone immediately. As you are a vulnerable adult you need to be protected and safeguarded from abuse.

Vulnerable adults are at risk of a variety of forms of abuse and neglect, a majority of which goes unreported. A vulnerable adult is a person over the age of eighteen who may not be able to protect themselves against significant harm or exploitation and this may be due to age, illness or lifestyle. They may have difficulties in expressing feelings or making their wishes known, making them more susceptible to abuse.

Sadly these issues are often not just local issues but also national. Most people will have heard about child abuse and child protection but may have not heard about the abuse of vulnerable adults such as the elderly, adults with learning disabilities and mental health problems.

All adults should be able to live free from fear and harm and have their rights and choices respected.

Bury Council along with the partner agencies across the Bury borough are working together and have adopted joint procedures to ensure that when suspected abuse is reported appropriate action is taken.

Abuse can take many forms:

- ❖ Physical Abuse – hitting, punching, kicking, slapping;
- ❖ Sexual Abuse – kissing, unwanted touching, carrying out sexual acts;
- ❖ Psychological Abuse – intimidation, isolation, humiliation, harassment;
- ❖ Financial Abuse – theft, fraud, misuse of money by someone who is trusted; and
- ❖ Neglect – the needs of a dependent person are not met;

Anyone can be an abuser – relative, volunteer, paid staff that provide care and services, neighbours and strangers. Abuse can take place anywhere – at home, in a public place, day centres, in a care / nursing home. A list of contacts can be found in **Paperwork 4.2**.

If you suspect abuse is happening to you – Report it to these services so that it can be stopped - Please do not suffer in silence.

Supporting your Personal Assistant's Future

5.1 The benefits of encouraging training

Making your Personal Assistant feel welcome from the start will encourage them to stay with you. Investing in their future will also benefit you too and may lead to greater commitment.

Training your Personal Assistant and regularly reviewing them does not mean that your employee will disappear using this investment of time and training to find work elsewhere. It could actually ensure that they stay with you because they feel up skilled, safe and with a potential career pathway for the future should they wish to remain in social care if their employment with you comes to an end.

As an employer your life might be enhanced in all sorts of ways by the skills that a Personal Assistant with the correct training and confidence can bring to their role.

It is advisable to ensure that your Personal Assistant has some mandatory training such as health and safety, moving and handling food hygiene and first aid. It is worth remembering that if they have an accident whilst lifting you then you could be without your member of staff for some time. They may also take legal action against you for not protecting them whilst in your employment. Accidents can always happen but training can prevent some from occurring and so it is advisable that you consider allowing your Personal Assistant to attend training sessions to protect both them and you.

Many types of training can be sourced locally; some of it facilitated by community user led and voluntary groups, some by family and friends, and some would need to be accessed by training companies or by Bury Council.

Much of this training is completely free. This is even true of much of the more 'formal' training provided by training providers. The only financial cost to you as an employer is that you would need to invest in the cover you would require whilst your Personal Assistant is away from their normal duties. It is worth remembering that some training might be so beneficial to your Personal Assistant that they may even be prepared to attend it in their non-working hours.

A list of information relating to the training available locally, which is provided by Bury Council Adult Care Services, is recorded on the following chart and in **Paperwork 5.1** with additional internet links.

Course	Workbook	E-Learning	Classroom	Duration	Renewals
Safeguarding Adults Awareness A course which looks at how to protect vulnerable adults against abuse by others.	•	•	•	½ day	
Mental Capacity Act The Mental Capacity Act came into force in October 2007. It protects people who cannot make decisions for themselves due to a learning disability or a mental health condition, or for any other reason. It provides clear guidelines for carers such as personal assistants and professionals about who can take decisions in which situations.	•	•		½ day	
Level 2 Health & Safety in Health & Social Care (hygiene/Infection control) Enables your Personal Assistant knows how to best protect you against infection/illness.			•	1 day	
Level 2 Food Safety Enables your Personal Assistant to know the food safety risks so that you do not become ill due to their food preparation.			•	1 day	Every 3 years
Moving and Handling People (Induction) All moving and handling courses are designed to give guidance on the best ways to move and handle people or objects so to avoid risk of injury.			•	1 day	
Moving and Handling People (Refresher)			•	1 day	Annually
Moving and Handling Kinetic (None People)			•	2 hour	
Moving and Handling Kinetic (Refresher)			•	2 hour	Annually
Principles of good record keeping (person centred care / Care Planning) Helps your personal assistant to understand the importance of keeping good records and keeping to your care plan.			•	1 day	
Accredited Safe Handling of Medicines Level 2 Administering) service specific/generic route Helps your personal assistant to understand the importance of administering medicines correctly and at the right times.		•	•	½ day	Every 2 years
Emergency First Aid at Work Enables your personal assistant to know what to do if you had an accident or are taken ill in their care.			•	1 day	Every 3 years

If you have any queries about the suitability of Bury Council's arranged training or would like your Personal Assistant to participate in one of these courses, please contact a member of the Development & Training Team on 0161 253 5151 or at d&t.enquiries@bury.gov.uk who will be able to provide you with the relevant details of how to book places on these training sessions.

You may decide you wish to access training from other training providers who you can contact via the internet or you may have very specific needs due to a particular health condition that can only be met by allowing your Personal Assistant to undergo specialist training. There may be a cost for this specialist training and, if you wish your Personal Assistant to receive such training, it would be beneficial for you to speak to your Social Worker who may be able to incorporate this specialist training cost at the assessment stage when planning your personal budget.

5.2 Providing Feedback

For any employee in any work place it is important for them to receive feedback as to how they are performing so that they can gain job satisfaction and develop within their role. In many organisations this is achieved informally by having one to one chats and more formally by reviews and appraisals. This is no different for Personal Assistants working in their communities enabling people to maintain independence in their lives.

The process does not need to be too structured but by having a process your member of staff will feel valued and be more likely to stay working for you. You might feel that weekly chats over a cup of coffee might suffice. Initially, for example, during your Personal Assistant's probation period with you might wish to complete a simple feedback/review form every week or every four weeks and thereafter change the frequency to every six months or year. A copy of a suitable document is in **Paperwork 5.2** which is a very simple process of recording Achievements, Benefits, Concerns and Do Next issues. This document would act as a record of progress and a way to celebrate success and deal with minor concerns. It is also a useful document to record training needs and career aspirations under the Do Next section.

5.3 Supporting Continuous Professional Development

It is not always possible for all sorts of reasons for your employee to remain working for you. You might need other care which cannot be provided by a Personal Assistant, or they may choose to leave your employment or increase their hours of work by working for someone else as well as you as a Personal Assistant. In all these scenarios it would be useful for your Personal assistant to have a record of what they have achieved both in terms of their training and also their achievements with you. In **Paperwork 5.3** there is a chart for recording their continuous professional development with you. This then acts as a portable document for them to show what they have achieved and how they would be employable as a Personal Assistant elsewhere.

PAPERWORK

FOR

YOUR

PERSONAL

ASSISTANT

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1.1 Personal Assistant Cover Chart

DAY					
Time	TASK	Hourly Rate	Premium Rate	Tax & NI	Total
06:00:00					
07:00:00					
08:00:00					
09:00:00					
10:00:00					
11:00:00					
12:00:00					
13:00:00					
14:00:00					
15:00:00					
16:00:00					
17:00:00					
18:00:00					
19:00:00					
20:00:00					
21:00:00					
22:00:00					
23:00:00					
00:00:00					
01:00:00					
02:00:00					
03:00:00					
04:00:00					
05:00:00					
Daily Cost					

1.1 Minimum Wage Chart

National Minimum Wage rates rose **from 1 October 2011**, with the minimum rate for workers aged 21 and over rising to £6.08 an hour.

National Minimum Wage rates

The National Minimum Wage rates effective from 1 October 2011 are:

- £6.08 an hour for workers aged 21 and over
- £4.98 an hour for workers aged 18 to 20
- £3.68 an hour for workers aged 16 to 17

Please note that in addition, a minimum wage rate for apprentices was set for the first time in October 2010.

Need advice on the minimum wage?

The Pay and Work Rights Helpline number is 0800 917 2368, or 0800 121 4042 for textphones.

1.2 Sample job description and person specification Guidance

Job title:	Personal Assistant (PA)
Reporting to:	(Your name)
Location:	Home care in the (do not put your address but the area where your home is located) area.
Nature of the job role:	To assist with a variety of tasks which will support the employer to live an independent personal and social life.

Main Duties:

Personal duties:
Domestic duties:
Social Duties:

These duties may vary from day to day.

Any other reasonable duties that may be necessary.

Hours of work:

(List the days and hours of work – you can add 'flexible hours to be mutually agreed' if you choose)

Rate of Pay:

(If the hours include evenings, sleepovers or weekends, list the different rates of pay e.g. weekdays - £8.00 per hour, sleepover - £37.80)

Qualifications and Experience:

Essential: (List the essential qualifications and experience you need your employee to have: e.g. driving licence, car and appropriate insurance, knowledge of a particular language or culture, able to swim, nursing qualification.)

Preferred: (List the qualifications and experience you would like your employee to have e.g. computer literate, good communicator, likes dogs, experience of this type of work.)

Job Description and Person Specification

Job title:

Reporting to:

Location:

Nature of the job role:

Main Duties:

Personal duties:

Domestic duties:

Social Duties:

Other Reasonable Duties:

Hours of work:

Rate of Pay:

Qualifications and Experience:

1.3 Useful Contacts

For all Finance / Funding enquiries

Please contact Bury Council's Direct Payment Team on

0161 253 7366/7401

For all general Personal Assistant enquiries

Please contact Bury GEMS on

0161 253 7676

For useful information about the role and recruitment of Personal Assistants along with an electronic copy of this pack and supporting documentation please follow the link

www.adultsocialcarejobsbury.co.uk

Bury Job Centre

To place an advert or book a room for interviews

Bury or Prestwich telephone 0845 601 2001

Royal Mail

To set up a PO Box telephone 0845 950950

Advisory, Conciliation, Arbitration Service (ACAS)

Helpline number 0845 7 474747

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1.3 Sample job application form

Surname (block letters):			
Other names:			
Address:			
Email address:			
Telephone:			
Mobile telephone:			
Education and training:			
<i>Year</i>	<i>Training Course</i>	<i>Provider</i>	<i>Results/Grade</i>
Further education (e.g. technical college, evening classes):			
<i>Year</i>	<i>Training Course</i>	<i>Provider</i>	<i>Results/Grade</i>
Any craft or other training:			
Hobbies and Interests:			

Employment history

1. Present employer address:			
Job title:			
Duties:			
Rate of pay:			
Date employed from:		Date employed to:	
2. Other Referee address (This person should not be family) It could be someone at school or college or some one who has known you for many years and can vouch for your suitability within this role :			
Nature of relationship:			
Duties:			
Rate of pay:			
Date employed from:		Date employed to:	
3. Other Referee address (This person should not be family) It could be someone at school or college or some one who has known you for many years and can vouch for your suitability within this role :			
Nature of relationship:			
Duties:			
Rate of pay:			
Date employed from:		Date employed to:	
<i>No approach will be made to your present employer or additional referee before an offer of employment is made to you.</i>			

Please tell me about other jobs you have done and about the skills you used and/or learned in those jobs:

Please tell me why you have applied for this post and give examples of things you have done that make you particularly suited to the job:

Have you ever been convicted of a criminal offence? (declaration subject to the Rehabilitation of Offenders Act 1974)

YES / NO

If you have a disability please tell me about any adjustments I may need to make to assist you at interview:

Please tell me if there are any dates when you will not be available for interview:

I can confirm that to the best of my knowledge the above information is correct. I accept that providing deliberately false information could result in my dismissal.

Signature: _____ Date: _____

1.4 Sample letter inviting people for an interview Guidance

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of applicant
Address of applicant

Dear *(applicant's name)*

Personal Assistant position

Further to your application for the position of Personal Assistant, I would be delighted if you could attend an interview on *(date)* at *(time)* at *(address)*.

Please write to the above address to confirm that you are able to attend.

(You may want to include a map for the location of the interview.)

(If you are paying people's interview expenses put the details here.)

I look forward to seeing you.

Yours sincerely

(Your name)

* Use the return address you used for applications, not your own address

Dear

Personal Assistant position

Further to your application for the position of Personal Assistant, I would be delighted if you could attend an interview on _____ at

Please write to the above address to confirm that you are able to attend.

I look forward to seeing you.

Yours sincerely

1.4 Sample letter not shortlisted for an interview

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of applicant
Address of applicant

Dear (*applicant's name*)

Personal Assistant position

Further to your application for the position of Personal Assistant, I am sorry to inform you that you have not been shortlisted on this occasion.

Thank you for the interest you have shown in working for me and I wish you every success in your job search.

Yours sincerely

(Your name)

* Use the return address you used for applications, not your own address

Dear

Personal Assistant position

Further to your application for the position of Personal Assistant, I am sorry to inform you that you have not been shortlisted on this occasion.

Thank you for the interest you have shown in working for me and I wish you every success in your job search.

Yours sincerely

1.4 Interview checklist and sample interview questions

Interview checklist

- ❖ Arrange a venue
- ❖ Think about a trial run; interviewing is just as stressful as being interviewed
- ❖ If required, arrange assistance with interviewing.
- ❖ List interview questions
- ❖ Plan the length of interview
- ❖ Think about how formal or informal you want to make it
- ❖ Prepare information to conclude the interview

Welcome and Ask

Don't forget to put your candidates at ease and describe to them the format of the interview. Introduce everyone present and explain why you need to Personal Assistant.

Questions

An interview is an exchange of information, therefore, it is important to listen and give the person a chance to speak and ask clear questions. Don't assume anything, whether in terms of giving or getting information. If you need to probe into the answers they have given then do so but be careful not to ask anything inappropriate which could offend your candidates on the grounds of age, sex, religion, race or sexual orientation.

Interview questions

Choose a few from the following list and add your own:

- ❖ Do you have any questions about the job description?
- ❖ I see that you don't have direct experience of this kind of work, but people often have other experience. For example, some people have members of their family, or friends, or maybe neighbours who are disabled in one way or another. What experience of working with disabled people do you have?

- ❖ If you were out with me and someone persisted in ignoring me and spoke only to you, how would you react?
- ❖ I will need to tell you how to do things in the way I want them done. How do you think you would cope with this?
- ❖ How would you react if you have done something and I want it done again in another way?
- ❖ What if I ask you to do something, and you think there is another way to do it that you would prefer – what would you do?
- ❖ If we did have a difference of opinion, how do you think you would deal with this?
- ❖ What qualities and experience do you have that you think would make you a good personal assistant?
- ❖ Would you be interested if there is any training available?
- ❖ Have you been on any relevant training courses? If so, what and when?
- ❖ Would you be prepared to consider being called on at short notice to do more than your usual hours, e.g. if another personal assistant goes off sick?
- ❖ What shifts would you prefer, e.g. days, nights or a mixture?
- ❖ What are your hobbies/interests?
- ❖ Do you have a car? Would you be prepared to use it for work?
- ❖ Would you be prepared to consider part-time or relief work?
- ❖ Any questions you'd like to ask me?

If you have pets you might want to mention them. Some people have allergies and could not work with pets.

If relevant you should ask why they are leaving, or have left, their current or last job. You should mention any other things you enjoy doing such as gardening, socialising and ask if the Personal Assistant would be prepared to do this as part of their job.

You may have other needs which require assistance which are very specific to your cultural needs. You may need your hair plaiting, help with putting on a sari, or assisting with the preparation of Kosher/ Halal food. This list is not exhaustive.

You may have found the ideal candidate who does not possess these skills but they might be prepared to learn so it is important to address them and ask the candidate if they would be prepared to undergo some formal or informal training.

Supply and Part

Concluding the interview. You should also explain the following:

- ❖ Pay and conditions and any rota system you have worked out in advance.
- ❖ Contract of employment.
- ❖ When/how they will hear if they have been successful or not.
- ❖ That you will take up references for them before appointment.
- ❖ Tell them that if they are successful relevant Criminal Records Bureau (CRB) checks may be carried out before they can start work. Ask the Direct Payment Support Service for clarification.

1.5 Right to Work in the UK Checklist

Your Personal Assistant must be entitled to work in the UK in line with the Asylum and Immigration Act 1996. To ensure they have this entitlement you need to ask them to provide one of the following, either in person by post, prior to their start date. The Documents need to be the originals and you must verify them as originals,

- A passport describing you as a British citizen or a national from an EEA (European Economic Area) country or otherwise entitled to work in the UK.
- A birth certificate issued in the UK or the republic of Ireland.
- A letter from the Home Office confirming that you are allowed to work in the UK.

You will also need a national insurance number. This can be found on one of the following documents,

- A payslip from previous employment in the U K
- A P60 or P45.
- National Insurance Card.

Failure to provide this documentation prior to their start date may result in you being unable to recruit them. It is important that you keep a copy for your records.

1.5 Insurance Providers

Whilst this list is not exhaustive these are some insurance providers used by current Personal Assistants within the borough.

Premier Care 0845 838 4709 email:
Enquiries@home-employment-insurance.info

Fish www.fishinsurance.co.uk

Ellis Bates www.ellisbatescare.com

Zurich www.zurich.co.uk

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1.5 Sample letter asking for a reference

Your Name
C/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Referee
Address of Referee

Dear (*referee's name*)

RE: (*employee's name*)

The above named has applied for a position of Personal Assistant and has given your name as a referee.

I would be grateful if you would be kind enough to answer the following questions, along with any relevant additional comments that you may care to offer, and return in the enclosed stamped addressed envelope.

Has this person experience relating to the enclosed job description within their current role with you?

How reliable has this person been whilst working for you?

What periods of sick leave has this person had and what were the reasons?

If this person has not worked for you please can you supply a character reference with the dates you have known them.

May I take this opportunity to thank you for your co-operation and assure you that this information will be treated in the strictest confidence.

Yours sincerely

(Your name)

* Use the return address you used for applications, not your own address

Dear

RE:

The above named has applied for a position of Personal Assistant and has given your name as a referee.

I would be grateful if you would be kind enough to answer the following questions, along with any relevant additional comments that you may care to offer, and return in the enclosed stamped addressed envelope.

Has this person experience relating to the enclosed job description within their current role with you?

How reliable has this person been whilst working for you?

What periods of sick leave has this person had and what were the reasons?

If this person has not worked for you please can you supply a character reference with the dates you have known them.

May I take this opportunity to thank you for your co-operation and assure you that this information will be treated in the strictest confidence.

Yours sincerely

1.6 Sample letter offering the job

Your name
c/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Applicant
Address of Applicant

Dear (*applicant's name*)

Offer of employment

Further to your recent interview, I am pleased to be able to confirm the following offer of employment, (subject to satisfactory references).

Job title:	Personal Assistant
Hours of work	<i>(insert hours of work)</i>
Annual leave	<i>(insert number of days/hours)</i>
Probationary period	<i>(insert number of weeks)</i>
Salary	<i>(insert salary)</i>
Start date	<i>(insert start)</i>

I would be grateful if you could confirm your acceptance in writing or by phone.

Yours sincerely

(Your name)

* Use the return address you used for applications not your own address

Dear

Offer of employment

Further to your recent interview, I am pleased to be able to confirm the following offer of employment, (subject to satisfactory references).

Job title:	Personal Assistant
Hours of work	
Annual leave	
Probationary period	
Salary	
Start date	

I would be grateful if you could confirm your acceptance in writing or by phone.

Yours sincerely

1.6 Sample letter turning down an applicant

Your Name
C/o Direct Payment Advisor / Job Centre / PO Box*

Date

Name of Interviewee
Address of Interviewee

Dear (*interviewee's name*)

With regards to the interview held on (*date*) for the position of Personal Assistant, I regret to inform you that you have not been successful on this occasion.

(If you are offering people feedback on why they didn't get the job, say so here and give details as to how they can contact you.)

Thank you for taking the time to make your application and attend the interview and I hope you find a suitable position in the near future.

Yours sincerely

(Your name)

* Use the return address you used for applications not your own address

Dear

With regards to the interview held on (*date*) for the position of Personal Assistant, I regret to inform you that you have not been successful on this occasion.

Thank you for taking the time to make your application and attend the interview and I hope you find a suitable position in the near future.

Yours sincerely

2.1 Sample Contract of Employment with Guidance

GUIDANCE COPY

Statement of main terms and conditions of employment

Employer's name:

Employee's name:

Date of commencement of employment:

Main place of work: *(insert your address)*

Job title: Personal Assistant

Duties and responsibilities:

As set out in the job description. The employer may require you to carry out other reasonable duties as required.

Probationary period:

There will be a probationary period of (**usually three months*). At the end of this period the position will be reviewed and if satisfactory the continuation of your employment will be confirmed. During the probationary period either party can terminate employment by giving one week's notice.

Hours of work:

Your hours of work will be

(Insert number of hours) weekday hours

(Insert number of hours) weekend hours

(Insert number of sleepovers if required) sleepover(s)

There is a need for the employee to be flexible and these hours may be changed as required according to the employer's needs. Under these circumstances, where hours need to be changed or additional hours worked, the employer will give as much notice as possible. For more information see Policies and Paperwork for your Personal Assistant ([Section 1.1](#)).

Lateness:

If you are going to be more than 10 minutes late you are required to contact the employer as soon as possible but at the very latest 30 minutes before you are due to start work

Salary:

As an hourly paid employee, your salary will be £(*insert weekday hourly rate before NIC or Tax deductions*) for weekdays, £(*insert weekend hourly rate before National Insurance Contributions and Tax deductions*) for weekends and bank holidays and £(*insert rate for sleepover before National Insurance Contributions and Tax deductions*) for sleepovers. Your salary is payable (*insert either monthly or weekly*) and will be paid on (*insert date of salary payment. If monthly it could be the third working day of the month or last Friday in the month for example. If weekly insert day of payment*) by (*insert direct payment into your bank/cheque/cash*).

The employer will deduct National Insurance and Income Tax as required by law. The employer may also deduct any overpayment of wages or holiday entitlement.

Pensions:

There is no pension scheme available with employer's contributions however if you are eligible you may be offered access to a Stakeholder Pension scheme.

Time sheets:

You will be required to complete a (*insert either monthly / weekly depending on payment of salary*) signed time sheet and submit this to the employer on (*insert day of the month or week giving time to work out wages or send to payroll agency to ensure wages can be paid on the given date*).

Holiday entitlement:

The holiday year is from (*insert holiday year – usually either 1st January – 31st December or 1st April – 31st March*). Your holiday entitlement must be taken during this period. Payment will not be made for any unused holiday and these cannot be taken into the next holiday period. _

The full amount of your holiday entitlement is (*insert number of weeks and days – 5.6 days is the minimum legal requirement*) per year pro-rata per

completed months employment. One week being the equivalent of weekly hours worked.

Bank holidays may be booked as holidays or will be paid at the weekend rate.

Holidays must be agreed with the employer at least (insert how many weeks – four weeks is usual) in advance. You may not take more than (insert number of days – 10 days is the usual) working days consecutively without the employer's prior written consent.

Should you leave employment and you have exceeded your holiday entitlement then this will be deducted from your final pay packet. If holiday entitlement is owed you will be paid for the outstanding entitlement.

(Take out if this is not appropriate) If it is agreed that you will accompany your employer on holidays as part of the required support, this time will be counted as working hours and you will not be expected to use your holiday entitlement. For more information see Policies and Paperwork for your Personal Assistant. (**Section 2.2**)

Sickness leave:

If you are ill and unable to attend work you should inform your employer as soon as possible to enable other arrangements to be made.

You will be entitled to Statutory Sick Pay (SSP) on production of an Employee's Statement of Sickness (form SC2) which must be completed for sick leave of more than three days or a medical certificate for sick leave of more than seven days. These forms must be sent directly to your employer. For more information see Policies and Paperwork for your Personal Assistant (**Section 3.4**)

Hospital stays:

After the employer has spent 4 weeks in hospital their funding payments may be suspended pending a further review.

Should this occur the employer reserves the right to give notice of termination of employment

Termination of employment (Notice):

During the probationary period either party requires one week's notice. Up to two years of continuous employment you will be given one week's notice. After two years continuous service you will be given one additional week's notice for each completed year up to a maximum of 12 weeks' notice. After satisfactory completion of your probationary period you are required to give (*insert one month or four weeks'*) notice in writing irrespective of length of service.

The employer reserves the right to pay your basic salary in lieu of notice instead of requesting that you work your notice period. In these circumstances you may not be employed by any other person or company whilst receiving pay in lieu of notice.

The employer reserves the right to dismiss you without notice in cases of serious breach of the terms of your employment, gross misconduct or gross negligence by you. For more information please see Policies and Paperwork for your Personal Assistant (**Section 3.5**).

Health and safety:

It is the responsibility of both the employer and employee to ensure that the workplace is a safe and healthy environment (Health and Safety at Work Act 1974 Part 1 section 2 and 7). The employer will ensure Employer's liability insurance is in place and a risk assessment of the home will be undertaken periodically by employer and employee. For more information see Policies and Paperwork for your Personal Assistant (**Section 2.3**).

Confidentiality:

All information regarding the employer, the employer's family and the employer's domestic or personal circumstances is strictly confidential and cannot be discussed with a third party without the Employer's specific permission, or in an emergency situation.

The employer will hold personal information about you as personnel records. The employer will abide by the Data Protection act and disclose this information only to the relevant third parties e.g. HM Revenue and Customs.

Grievance procedure:

If you have a grievance you should comply with the grievance procedure. For more information contact ACAS on 08457 47 47 47 or see the Grievance procedure in Policies for your Personal Assistant pack guidance (**Section 3.2**).

Disciplinary procedures:

Minor problems will be dealt with and resolved informally. In cases of more serious problems, depending on the seriousness of the breach of terms and conditions of contract or conduct and performances of your duties, one of the following disciplinary actions may be taken.

- ❖ A warning which will be confirmed to you in writing and recorded in your personnel file for a period of months.
- ❖ A final warning which would be confirmed to you in writing advising that further misconduct could lead to dismissal and recorded in your personnel file for a period of months.

For more information please see the Disciplinary procedure in Policies and Paperwork for your Personal Assistant (**Section 3.3**).

Dismissal:

In case of gross misconduct there will be no period of notice given. If you are in your probationary period or first year of employment, only one warning is required before dismissal.

Before any of these actions are taken you will receive a letter setting out the details of the alleged misconduct and inviting you to a meeting to discuss the matter. You will have the right to be accompanied to the meeting by a work colleague or a trade union representative. After the meeting you will be informed if any further action will be taken. You have the right to appeal but must do so within 5 working days of receipt of the notification of the decision.

For more information please see the Dismissal Information in Policies and Paperwork for your Personal Assistant (**Section 3.3**). You have the right to appeal but must do so within 5 working days of receipt of the notification of the decision.

Additional Items specific to requirements: (List)

These might include very specific requirements such as;

- ❖ Smoking – it is your decision if you allow someone to smoke in your home. You need to state your requirements.
- ❖ Transport - You need to consider business insurance cover and continuation of employment should your Personal Assistant lose their driving licence for some reason.

- ❖ Meals on duty – You need to decide if you are going to provide meals for your Personal Assistant during their working shifts.
- ❖ Working overseas- You need to consider if you wish your personal assistant to travel abroad with you.

Statement of main terms and conditions of employment

PLEASE COMPLETE

Employer's name:

Employee's name:

Date of commencement of employment:

Main place of work:

Job title:

Duties and responsibilities:

Probationary period:

There will be a probationary period of _____. At the end of this period the position will be reviewed and if satisfactory the continuation of your employment will be confirmed. During the probationary period either party can terminate employment by giving one week's notice.

Hours of work:

Your hours of work will be:

	weekday hours
	weekend hours
	sleepover(s)

There is a need for the employee to be flexible and these hours may be changed as required according to the employer's needs. Under these circumstances, where hours need to be changed or additional hours worked, the employer will give as much notice as possible.

Lateness:

If you are going to be more than 10 minutes late you are required to contact the employer as soon as possible but at the very latest 30 minutes before you are due to start work

Salary:

As an hourly paid employee, your salary will be £_____ for weekends and bank holidays and £_____ for sleepovers. Your salary is payable by _____.

The employer will deduct National Insurance and Income Tax as required by law. The employer may also deduct any overpayment of wages or holiday entitlement.

Pensions:

There is no pension scheme available with employer's contributions however if you are eligible you may be offered access to a Stakeholder Pension scheme.

Time sheets:

You will be required to complete a signed time sheet and submit this to the employer

Holiday entitlement:

The holiday year is from _____.

Your holiday entitlement must be taken during this period. Payment will not be made for any unused holiday and these cannot be taken into the next holiday period.

The full amount of your holiday entitlement is _____ hours per year pro-rata per completed months employment. One week being the equivalent of weekly hours worked.

Bank holidays may be booked as holidays or will be paid at the weekend rate.

Holidays must be agreed with the employer at least _____ in advance. You may not take more than _____ working days consecutively without the employer's prior written consent.

Should you leave employment and you have exceeded your holiday entitlement then this will be deducted from your final pay packet. If holiday entitlement is owed you will be paid for the outstanding entitlement.

If it is agreed that you will accompany your employer on holidays as part of the required support, this time will be counted as working hours and you will not be expected to use your holiday entitlement.

Sickness leave:

If you are ill and unable to attend work you should inform your employer as soon as possible to enable other arrangements to be made.

You will be entitled to Statutory Sick Pay (SSP) on production of an Employee's Statement of Sickness (form SC2) which must be completed for sick leave of more than three days or a medical certificate for sick leave of more than seven days. These forms must be sent directly to your employer.

Hospital stays:

After the employer has spent 4 weeks in hospital their funding payments may be suspended pending a further review.

Should this occur the employer reserves the right to give notice of termination of employment.

Termination of employment (Notice):

During the probationary period either party requires one week's notice.

Up to two years of continuous employment you will be given one week's notice.

After two years continuous service you will be given one additional week's notice for each completed year up to a maximum of 12 weeks' notice.

After satisfactory completion of your probationary period you are required to give _____ notice in writing irrespective of length of service.

The employer reserves the right to pay your basic salary in lieu of notice instead of requesting that you work your notice period. In these circumstances you may not be employed by any other person or company whilst receiving pay in lieu of notice.

The employer reserves the right to dismiss you without notice in cases of serious breach of the terms of your employment, gross misconduct or gross negligence by you.

Health and safety:

It is the responsibility of both the employer and employee to ensure that the workplace is a safe and healthy environment (Health and Safety at Work Act 1974 Part 1 section 2 and 7). The employer will ensure Employer's liability insurance is in place and a risk assessment of the home will be undertaken periodically by employer and employee.

Confidentiality:

All information regarding the employer, the employer's family and the employer's domestic or personal circumstances is strictly confidential and cannot be discussed with a third party without the Employer's specific permission, or in an emergency situation.

The employer will hold personal information about you as personnel records. The employer will abide by the Data Protection act and disclose this information only to the relevant third parties e.g. HM Revenue and Customs.

Grievance procedure:

If you have a grievance you should comply with the grievance procedure.

Disciplinary procedures:

Minor problems will be dealt with and resolved informally.

In cases of more serious problems, depending on the seriousness of the breach of terms and conditions of contract or conduct and performances of your duties, one of the following disciplinary actions may be taken.

Minor problems will be dealt with and resolved informally.

In cases of more serious problems, depending on the seriousness of the breach of terms and conditions of contract or conduct and performances of your duties, one of the following disciplinary actions may be taken.

- ❖ A warning which will be confirmed to you in writing and recorded in your personnel file for a period of _____ months.
- ❖ A final warning which would be confirmed to you in writing advising that further misconduct could lead to dismissal and recorded in your personnel file for a period of _____ months.

You have the right to appeal but must do so within 5 working days of receipt of the notification of the decision.

Dismissal:

In case of gross misconduct there will be no period of notice given. If you are in your probationary period or first year of employment, only one warning is required before dismissal.

Before any of these actions are taken you will receive a letter setting out the details of the alleged misconduct and inviting you to a meeting to discuss the matter. You will have the right to be accompanied to the meeting by a work colleague or a trade union representative. After the meeting you will be informed if any further action will be taken. You have the right to appeal but must do so within 5 working days of receipt of the notification of the decision.

Additional Items specific to requirements: (List)

I accept these terms and conditions of employment.

Signed: _____ Personal Assistant

Date: _____

(Two copies one signed copy to be retained by employer)

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Holiday Entitlement Calculator 2.2

assuming full time to be 40 hours per week and leave to be 5.6 weeks (224 hours per leave year)

Average no of hours worked per week	No of complete months employed in leave year											
	1	2	3	4	5	6	7	8	9	10	11	12
1	0.47	0.93	1.40	1.87	2.33	2.80	3.27	3.73	4.20	4.67	5.13	5.60
2	0.93	1.87	2.80	3.73	4.67	5.60	6.53	7.47	8.40	9.33	10.27	11.20
3	1.40	2.80	4.20	5.60	7.00	8.40	9.80	11.20	12.60	14.00	15.40	16.80
4	1.87	3.73	5.60	7.47	9.33	11.20	13.07	14.93	16.80	18.67	20.53	22.40
5	2.33	4.67	7.00	9.33	11.67	14.00	16.33	18.67	21.00	23.33	25.67	28.00
6	2.80	5.60	8.40	11.20	14.00	16.80	19.60	22.40	25.20	28.00	30.80	33.60
7	3.27	6.53	9.80	13.07	16.33	19.60	22.87	26.13	29.40	32.67	35.93	39.20
8	3.73	7.47	11.20	14.93	18.67	22.40	26.13	29.87	33.60	37.33	41.07	44.80
9	4.20	8.40	12.60	16.80	21.00	25.20	29.40	33.60	37.80	42.00	46.20	50.40
10	4.67	9.33	14.00	18.67	23.33	28.00	32.67	37.33	42.00	46.67	51.33	56.00
11	5.13	10.27	15.40	20.53	25.67	30.80	35.93	41.07	46.20	51.33	56.47	61.60
12	5.60	11.20	16.80	22.40	28.00	33.60	39.20	44.80	50.40	56.00	61.60	67.20
13	6.07	12.13	18.20	24.27	30.33	36.40	42.47	48.53	54.60	60.67	66.73	72.80
14	6.53	13.07	19.60	26.13	32.67	39.20	45.73	52.27	58.80	65.33	71.87	78.40
15	7.00	14.00	21.00	28.00	35.00	42.00	49.00	56.00	63.00	70.00	77.00	84.00
16	7.47	14.93	22.40	29.87	37.33	44.80	52.27	59.73	67.20	74.67	82.13	89.60
17	7.93	15.87	23.80	31.73	39.67	47.60	55.53	63.47	71.40	79.33	87.27	95.20
18	8.40	16.80	25.20	33.60	42.00	50.40	58.80	67.20	75.60	84.00	92.40	100.80
19	8.87	17.73	26.60	35.47	44.33	53.20	62.07	70.93	79.80	88.67	97.53	106.40
20	9.33	18.67	28.00	37.33	46.67	56.00	65.33	74.67	84.00	93.33	102.67	112.00
21	9.80	19.60	29.40	39.20	49.00	58.80	68.60	78.40	88.20	98.00	107.80	117.60
22	10.27	20.53	30.80	41.07	51.33	61.60	71.87	82.13	92.40	102.67	112.93	123.20
23	10.73	21.47	32.20	42.93	53.67	64.40	75.13	85.87	96.60	107.33	118.07	128.80
24	11.20	22.40	33.60	44.80	56.00	67.20	78.40	89.60	100.80	112.00	123.20	134.40
25	11.67	23.33	35.00	46.67	58.33	70.00	81.67	93.33	105.00	116.67	128.33	140.00
26	12.13	24.27	36.40	48.53	60.67	72.80	84.93	97.07	109.20	121.33	133.47	145.60
27	12.60	25.20	37.80	50.40	63.00	75.60	88.20	100.80	113.40	126.00	138.60	151.20
28	13.07	26.13	39.20	52.27	65.33	78.40	91.47	104.53	117.60	130.67	143.73	156.80
29	13.53	27.07	40.60	54.13	67.67	81.20	94.73	108.27	121.80	135.33	148.87	162.40
30	14.00	28.00	42.00	56.00	70.00	84.00	98.00	112.00	126.00	140.00	154.00	168.00
31	14.47	28.93	43.40	57.87	72.33	86.80	101.27	115.73	130.20	144.67	159.13	173.60
32	14.93	29.87	44.80	59.73	74.67	89.60	104.53	119.47	134.40	149.33	164.27	179.20
33	15.40	30.80	46.20	61.60	77.00	92.40	107.80	123.20	138.60	154.00	169.40	184.80
34	15.87	31.73	47.60	63.47	79.33	95.20	111.07	126.93	142.80	158.67	174.53	190.40
35	16.33	32.67	49.00	65.33	81.67	98.00	114.33	130.67	147.00	163.33	179.67	196.00
36	16.80	33.60	50.40	67.20	84.00	100.80	117.60	134.40	151.20	168.00	184.80	201.60
37	17.27	34.53	51.80	69.07	86.33	103.60	120.87	138.13	155.40	172.67	189.93	207.20
38	17.73	35.47	53.20	70.93	88.67	106.40	124.13	141.87	159.60	177.33	195.07	212.80
39	18.20	36.40	54.60	72.80	91.00	109.20	127.40	145.60	163.80	182.00	200.20	218.40
40	18.67	37.33	56.00	74.67	93.33	112.00	130.67	149.33	168.00	207.41	228.15	224.00

Notice Periods 2.2

Probationary Period

During the probationary period (usually 3 months) either party requires one week's notice.

Notice your personal assistant must give to you

Your employee must give 4 week's notice in writing irrespective of their length of service.

Notice you must give to your Personal Assistant

Whatever their contract says, you must give at least the statutory minimum period of notice, which depends on how long they've worked for you:

- ❖ one week if you have been continuously employed for between one month and two years
- ❖ one week for each complete year (up to a maximum of 12) if you have been continuously employed for two or more years

So, for example, if they have had six and a half years service, they will be entitled to six week's notice.

No Notice gross misconduct dismissal

Should you dismiss your personal assistant due to gross misconduct you do not need to pay notice pay. Please remember to seek employment advice before you decide to dismiss.

2.3 Self Employed Employee Invoice

INVOICE				
To:		From		
Day	Date	Hours Worked	Cost per hour	Total cost per day
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				
	Total Hours worked:	0	Total cost per week:	£0.00
~ DECLARATION ~				
I agree and understand that the above invoice is submitted on a "Self Employed" basis and can confirm that I am personally responsible for any Income Tax and NI Contributions.				
Signed: _____		Date: _____		

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2.3 Payroll Providers

This list of payroll services is not exhaustive but below are companies currently being used by those needing care in the Bury borough

PayPartners: 0800 515 620 www.paypartners.co.uk

Instream: 07950107307 office@instream.org.uk

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2.3 Sample risk assessment

<p>Step 1 What are the hazards?</p> <p>Spot hazards by:</p> <ul style="list-style-type: none"> ▪ Looking at your 'safety in the home' checklist. ▪ Visiting the 'your industry' area of the HSE website or calling the HSE infoline. ▪ Calling the Workplace Health Connect Adviceline or visiting their website. ▪ Checking manufacturer's instructions ▪ Contacting your Direct Payment Support Service. 	<p>Step 2 Who might be harmed and how?</p> <p>Identify possible people. Remember:</p> <ul style="list-style-type: none"> ▪ Some workers have particular needs. ▪ People who may not be in your home all the time. ▪ Visitors. ▪ Think about how your work affects others present. <p>See how the hazard could cause harm.</p>	<p>Step 3 What are you already doing?</p> <p>List what is already in place to reduce the likelihood of harm or make any harm less serious</p>	<p>What further action is necessary?</p> <p>You need to make sure that you have reduced risks 'so far as is practicable'. List what more needs to be done.</p>	<p>Step 4 How will you put the assessment in action?</p> <p>Remember to prioritise. Deal with those hazards that are high-risk and have serious consequences first.</p>
<p>Step 5</p> <p>Review date:</p> <ul style="list-style-type: none"> ▪ Review your assessment to make sure you are still improving, or at least not sliding back. ▪ If there is a significant change in your home, remember to check your risk assessment and, where necessary, amend it. 				

2.3 Sample safety in the home checklist

Checklist procedure:

- ❖ The checklist should be completed annually.
- ❖ The checklist will also require completion each time there is a change to the environment.

Name:

Home address:

Date checklist complete:

	Satisfactory yes/no	Comments / actions required
Are doorways clear of obstacles?		
Do staircases have clear and easy access at all times?		
Are there any loose carpets on floors or staircases?		
Are there any overloaded sockets?		
Is there adequate ventilation?		
Is the heating adequate and controllable?		
Is lighting adequate?		
Is there any equipment that does not function properly?		
Any trailing or damaged flexes?		
Any damaged sockets?		
Does your personal assistant use visual display equipment?		
Do you have suitable and accessible fire-fighting equipment?		
Has it been serviced within the last year?		
Does your personal assistant have adequate space to complete their work?		
Will your PA have to excessively stretch or bend to complete tasks?		
Do you and your personal assistant have all the emergency contact numbers you require?		

Signed: _____

Date: _____

3.2 Exit Interview Questionnaire

Please could you indicate if any of the following are main factors in your decision to leave the job:

- Remuneration
- Benefits
- Conflict with my employer
- Working environment
- Family/friends related issues
- Commuting
- Working hours
- Career development
- Lack of job satisfaction
- Lack of prospects
- Dislike the role
- Travelling/moving away from area
- Rather not say
- Other answer

How strongly would you agree or disagree with the following – 1 being not at all and 5 being all the time

- The job was challenging
- The job was satisfying
- The proper tools and equipment were provided
- Sufficient training was provided
- Your skills and experience were properly utilised

If you are going to another care role can you describe what appeals to you more about this job?

Please return in the stamped addressed envelope. Thank you for taking the time to give me this feedback.

Grievance Informal Discussion Form 3.2/A

RECORD OF INFORMAL DISCUSSION			
Personal Assistant			
Employer			
Date issued raised		Date of meeting	
Brief description of issue			
ACTIONS AGREED			
Next step	By whom	By when	
Solutions/Outcomes			
We agree that:			
1	A decision was made to resolve the problem	<input type="checkbox"/>	
2	The issue should be referred to the formal grievance process	<input type="checkbox"/>	

Copy for Employer/Copy for PA

Grievance Formal Discussion Form 3.2/B

RECORD OF FORMAL GRIEVANCE DISCUSSION			
Personal Assistant			
Employer			
Date issued raised		Date of meeting	
Brief description of issue			
1	I would like to withdraw the grievance		
ACTIONS AGREED			
Next step	By whom	By when	
Solutions/Outcomes			
We agree that:			
2	A decision was made to resolve the problem	<input type="checkbox"/>	
3	The issue should be referred to the next stage of the formal grievance process	<input type="checkbox"/>	
Signed Employer		Signed Employee	

Copy for Employer/Copy for PA

3.3 Disciplinary procedure guidance (for the Employer)

1. Purpose of the policy

The aim of this policy is to support good conduct and performance. This policy sets out the action which will be taken when disciplinary rules are breached.

(Guidance Notes 1: The purpose should remind people that the policy is not designed as a dismissal procedure, but as a means of encouraging personal assistants to meet a good standard.)

2. Principles

If you are subject to disciplinary action:

- ❖ The procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated.
- ❖ At every stage you will be advised of the nature of the complaint, be given the opportunity to state your case, and to be represented or accompanied by an advocate of your choice (this could be a fellow employee, a union representative or a friend).
- ❖ You will not be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty will normally be dismissal without notice and without pay in lieu of notice.
- ❖ You have a right to appeal against any disciplinary action taken against you.

(Guidance Notes 2: Employers often lose at employment tribunals because they did not comply with the procedure – so always follow the procedure.)

3. Informal discussions

Before taking formal disciplinary action, I will make every effort to resolve the matter by informal discussions with you. Only where this fails to bring about the desired improvement will the formal disciplinary procedure be implemented.

(Guidance Notes 3: Make sure that personal assistants understand the difference between a routine complaint and action taken under the policy.)

4. First warning

If your conduct or performance is unsatisfactory, you will be given a written warning. This warning will be recorded, but disregarded after (X) months of satisfactory work. You will be informed that a final written warning may be considered if there is no sustained satisfactory improvement or change. (Where the first offence is serious, for example because it is having a serious harmful effect, I may move directly to a final written warning.)

(Guidance Notes 4: It can be unfair to keep details of warnings on an employee's file indefinitely. Unless a warning is for a very serious matter, it should be disregarded after, say, six months to a year. The written warning should accurately record the warning given at the disciplinary interview. Do not write the warning before the interview.)

5. Final written warning

If the offence is serious, or there is no improvement in standards, or if a further offence of a similar kind occurs, a final written warning will be given. This will include the reason for the warning and a note that if no improvement results within (X) months, you will be dismissed.

(Guidance Notes 5: The warning should state clearly that dismissal will result from a failure to comply. Except in cases of gross misconduct employees should receive notice or payment in lieu.)

6. Statutory discipline and dismissal procedure

If you face dismissal the minimum statutory procedure will be followed. This involves:

- ❖ Step one: a written note to you setting out the allegation and the basis for it.
- ❖ Step two: a meeting to consider and discuss the allegation.
- ❖ Step three: a right of appeal including an appeal meeting.

You will be reminded of your right to be accompanied by an advocate.

7. Gross misconduct

If, after investigation, it is confirmed that you have committed an offence of the following nature, the normal consequence will be dismissal without notice or payment in lieu of notice:

- ❖ Theft, damage to property, fraud, incapacity for work due to being under the influence of alcohol or illegal drugs, physical violence, bullying and gross insubordination.

(Note: the list is not exhaustive)

While the alleged gross misconduct is being investigated, you may be suspended, during which time you will be paid your normal pay rate. Any decision to dismiss you will be taken by me only after full investigation.

8. Appeals

If you wish to appeal against any disciplinary decision you must appeal in writing within 5 working days of the decision being communicated to you. Someone who was not involved in the original disciplinary action will hear the appeal and decide the case as impartially as possible.

(Note: You will need to think in advance who this might be, for example - the local advocacy agency/Independent Living Advisor/Direct Payment Support Service/User Led Organisation, etc.)

(Guidance Notes 6: Operating the disciplinary procedure. The ACAS Advisory handbook – Discipline and grievances at work gives some

useful information. You can download this as www.acas.org.uk/index.aspx?articleid=890 or order it from 08456 06 16 00.)

In brief, before taking disciplinary action using the procedure, you will need to be certain that:

- ❖ The matter cannot be resolved through informal counselling,
- ❖ You have investigated the matter fully,
- ❖ Your PA is informed that they will be interviewed and have the right to be accompanied by a fellow employee, friend or a trade union official of their choice.

At the disciplinary interview, make sure that:

- ❖ The employee concerned knows the details of the allegation.
- ❖ He or she has the opportunity to put across his or her side of the matter.
- ❖ Any disciplinary measure is appropriate to the circumstances.

If a warning is given, it should tell the employee:

- ❖ The level of improvement required.
- ❖ The date by which it is to be achieved.
- ❖ What will happen if it is not.
- ❖ How to appeal.

3.3 Disciplinary Guidance for your Personal Assistant

1. Purpose of the policy

The aim of this policy is to support good conduct and performance. This policy sets out the action which will be taken when disciplinary rules are breached.

(Guidance Notes 1: The purpose should remind people that the policy is not designed as a dismissal procedure, but as a means of encouraging personal assistants to meet a good standard.)

2. Principles

If you are subject to disciplinary action:

- ❖ The procedure is designed to establish the facts quickly and to deal consistently with disciplinary issues. No disciplinary action will be taken until the matter has been fully investigated.
- ❖ At every stage you will be advised of the nature of the complaint, be given the opportunity to state your case, and to be represented or accompanied by an advocate of your choice (this could be a fellow employee, a union representative or a friend).
- ❖ You will not be dismissed for a first breach of discipline except in the case of gross misconduct, when the penalty will normally be dismissal without notice and without pay in lieu of notice.
- ❖ You have a right to appeal against any disciplinary action taken against you.

(Guidance Notes 2: Employers often lose at employment tribunals because they did not comply with the procedure – so always follow the procedure.)

3. Informal discussions

Before taking formal disciplinary action, I will make every effort to resolve the matter by informal discussions with you. Only where this fails to bring about the desired improvement will the formal disciplinary procedure be implemented.

(Guidance Notes 3: Make sure that personal assistants understand the difference between a routine complaint and action taken under the policy.)

4. First warning

If your conduct or performance is unsatisfactory, you will be given a written warning. This warning will be recorded, but disregarded after (X) months of satisfactory work. You will be informed that a final written warning may be considered if there is no sustained satisfactory improvement or change. (Where the first offence is serious, for example because it is having a serious harmful effect, I may move directly to a final written warning.)

(Guidance Notes 4: It can be unfair to keep details of warnings on an employee's file indefinitely. Unless a warning is for a very serious matter, it should be disregarded after, say, six months to a year. The written warning should accurately record the warning given at the disciplinary interview. Do not write the warning before the interview.)

5. Final written warning

If the offence is serious, or there is no improvement in standards, or if a further offence of a similar kind occurs, a final written warning will be given. This will include the reason for the warning and a note that if no improvement results within (X) months, you will be dismissed.

(Guidance Notes 5: The warning should state clearly that dismissal will result from a failure to comply. Except in cases of gross misconduct employees should receive notice or payment in lieu.)

6. Statutory discipline and dismissal procedure

If you face dismissal the minimum statutory procedure will need to be followed. This involves:

- ❖ Step one: a written note to them setting out the allegation and the basis for it.
- ❖ Step two: a meeting to consider and discuss the allegation.
- ❖ Step three: a right of appeal including an appeal meeting.

You will be reminded of your right to be accompanied by an advocate.

7. Gross misconduct

If, after investigation, it is confirmed that you have committed an offence of the following nature, the normal consequence will be dismissal without notice or payment in lieu of notice:

- ❖ theft, damage to property, fraud, incapacity for work due to being under the influence of alcohol or illegal drugs, physical violence, bullying and gross insubordination.

(Note: the list is not exhaustive)

While the alleged gross misconduct is being investigated, you may be suspended, during which time you will be paid your normal pay rate. Any decision to dismiss you will be taken by me only after full investigation.

8. Appeals

If you wish to appeal against any disciplinary decision you must appeal in writing within 5 working days of the decision being communicated to you. Someone who was not involved in the original disciplinary action will hear the appeal and decide the case as impartially as possible.

(Note: You will need to think in advance who this might be, for example - the local advocacy agency/Independent Living Advisor/Direct Payment Support Service/User Led Organisation, etc.)

(Guidance Notes 6: Operating the disciplinary procedure. The ACAS Advisory handbook – Discipline and grievances at work gives some useful information. You can download this as www.acas.org.uk/index.aspx?articleid=890 or order it from 08456 06 16 00.)

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3.3 Employer Disciplinary Checklist

All disciplinary action up to and including dismissal must allow the recipient a right of appeal. Even if they fail to respond you must ensure that you have offered this. You will need to be certain that:

- You have offered a right of appeal verbally in your disciplinary meeting and followed up in writing. The matter cannot be resolved through informal counselling.
- You must state how many days your employee has to appeal against this decision (usually 5 working days).
- Your PA has been told that they will be interviewed and have the right to be accompanied by a fellow employee, friend or a trade union official of their choice.

At the disciplinary interview, make sure that:

- The employee concerned knows the details of the allegation.
- He or she has the opportunity to put across his or her side of any disciplinary measure is appropriate to the circumstances.

If a warning is given, it should tell the employee:

- The level of improvement required.
- The date by which it is to be achieved.
- What will happen if it is not.
- How to appeal.

3.3 Employer Appeals Checklist

All disciplinary action up to and including dismissal must allow the recipient a right of appeal. Even if they fail to respond you must ensure that you have offered this. You will need to be certain that:

- You have offered a right of appeal verbally in your disciplinary meeting and followed this decision in writing.
- You must state how many days your employee has to appeal against your decision. This is usually 5 working days.
- Your PA has been told that they will be interviewed and have the right to be accompanied by a friend or a trade union official of their choice.

At the Appeals interview, make sure that:

- He or she has the opportunity to put across his or her side of the matter.
- Consider whether the disciplinary measure was appropriate given the information that they present.

If the decision is upheld confirm this to your P A in writing.

- If the previous decision on reflection was too harsh revise your decision and inform your employee in writing. You may decide to reinstate their employment or give them a lesser warning.
- Inform those present that your decision is final.

Disciplinary Warnings 3.3/1

RECORD OF FIRST WRITTEN WARNING

You should be aware that first written warnings can lead to your dismissal.

This is to confirm that you have been issued with a first written warning in accordance with the Disciplinary Procedures for misconduct as described in your main statement of main terms and conditions of employment. Your misconduct is detailed below

This warning will remain live on your record for 26 weeks. This means that this warning will be taken into consideration if you commit further misconduct during this 26 week period.

Expiry Date: _____

If you wish to appeal against this warning on the grounds that is unfairly issued, you should set your appeal out in writing and send it to your employer within 5 working days stating the grounds for your appeal

This warning is issued by:

Name _____
Signature _____ Date _____

This warning is acknowledged by:

Name _____
Signature _____ Date _____

Representatives/ third parties present:

Name _____
Signature _____ Date _____

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Disciplinary Warnings 3.3/2

RECORD OF FINAL WRITTEN WARNING (Misconduct related including AWOL)

You should be aware that first written warnings can lead to your dismissal.

This is to confirm that you have been issued with a first written warning in accordance with the Disciplinary Procedures for misconduct as described in your main statement of main terms and conditions of employment. Your misconduct is detailed below

This warning will remain live on your record for 12 months. This means that this warning will be Taken into consideration if you commit further misconduct during this 12 month period

Expiry Date: _____

If you wish to appeal against this warning on the grounds that is unfairly issued, you should set your appeal out in writing and send it to your employer within 5 working days stating the grounds for your appeal

This warning is issued by:

Name _____
Signature _____ Date _____

This warning is acknowledged by:

Name _____
Signature _____ Date _____

Representatives/ third parties present:

Name _____
Signature _____ Date _____

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Disciplinary Warnings 3.3/3A

RECORD OF CONTRACTURAL DISMISSAL (Misconduct Related including AWOL)

Following your misconduct which has occurred on more than one occasion I have carefully considered your comments at the disciplinary meeting held on _____ you are advised that you are contractually dismissed in accordance with the Misconduct Procedures outlined in your statement of main terms and conditions of employment. Your latest misconduct is detailed below:

Your last day of employment will be, _____ at which time you will receive all wages owed to you including _____ weeks notice pay along with any outstanding holidays if appropriate.

If you wish to appeal against this dismissal on the grounds that it is unfairly issued, you should set your appeal out in writing and send it to your employer within 10 working days stating the grounds for your appeal.

This warning is issued by:

Name _____
Signature _____ Date _____

This warning is acknowledged by:

Name _____
Signature _____ Date _____

Representatives/ third parties present:

Name _____
Signature _____ Date _____

NB This wording in this form issued at the disciplinary meeting can be also used in any follow up letter.

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Disciplinary Warnings 3.3/3B

RECORD OF SUMMARY DISMISSAL (GROSS MISCONDUCT)

Following the incident on _____, an investigation has now been completed by me. Having taken account of your comments at a Disciplinary meeting held on _____, you are advised that you are summarily dismissed, that is with immediate effect in accordance with the Gross Misconduct Procedures outlined in your statement of main terms and conditions of employment. Your Gross Misconduct is detailed below:-

Summary dismissal means that you are dismissed instantly. You will not be paid in lieu of notice but any wages earned will be sent to you along with any payment for outstanding holidays if appropriate. These will be sent to you as soon as practical together with your P45.

If you wish to appeal against this dismissal on the grounds that it is unfairly issued, you should set your appeal out in writing and send it to me within 5 working days stating the grounds for your appeal.

This Summary Dismissal is issued by:-

Name _____
Signature _____ Date _____

This Summary Dismissal is acknowledged by:-

Name _____
Signature _____ Date _____

Representatives/ third parties present:-

Name _____
Signature _____ Date _____

NB This wording in this form issued at the disciplinary meeting can be also used in any follow up letter.

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3.3/3C AWOL First letter

Your name/address

Date

Name of Personal Assistant
Address of Personal Assistant

Dear (*name*)

Absent with out leave

I tried to telephone you on (date and time) to ask why you failed to attend work as I am concerned about you.

Please can you let me know by receipt of this letter where you were and when you will be able to attend work again. As you know I need to have cover for my care needs and if you are unable to attend for some reason I need to know so that I can plan for these needs.

Should you fail to respond to my requests for information I will have no alternative but to dismiss you on the grounds that you are absent without leave.

I look forward to seeing you.

Yours sincerely

(Your name)

Your name/address

Date

Name of Personal Assistant
Address of Personal Assistant

Dear

Absent with out leave

I tried to telephone you on _____ to ask why you failed to attend work as I am concerned about you.

Please can you let me know by receipt of this letter where you were and when you will be able to attend work again. As you know I need to have cover for my care needs and if you are unable to attend for some reason I need to know so that I can plan for my needs.

Should you fail to respond to my requests for information I will have no alternative but to dismiss you on the grounds that you are absent without leave.

I look forward to seeing you.

Yours sincerely

(Your name)

3.3/3D AWOL Second Letter

Your name/address

Date

Name of Personal Assistant
Address of Personal Assistant

Dear (*name*)

Absent with out leave – Invite to a disciplinary meeting

Following my letter dated (date and time) you have still not responded to me as to why you failed to attend work.

I would like you to attend a meeting with me to discuss your failure to attend work and offer any support possible. I would like you to attend a meeting at my home on (date and time) so that we can discuss your absence from work. This is a disciplinary meeting and you are entitled to bring someone with you to support you. Your failure to respond to this letter will mean that the meeting will go ahead in your absence and you will be dismissed due to being absent without leave.

Should you fail to respond to my requests for information I will have no alternative but to dismiss you on the grounds that you are absent without leave and my care needs are not being met.

I look forward to seeing you on (date).

Yours sincerely

(Your name)

Your name/address

Date

Name of Personal Assistant
Address of Personal Assistant

Dear

Absent with out leave – Invite to a disciplinary meeting

Following my letter dated _____ you have still not responded to me as to why you failed to attend work.

I would like you to attend a meeting with me to discuss your failure to attend work and offer any support possible. I would like you to attend a meeting at my home on _____ so that we can discuss your absence from work. This is a disciplinary meeting and you are entitled to bring someone with you to support you. Your failure to respond to this letter will mean that the meeting will go ahead in your absence and you will be dismissed due to being absent without leave.

Should you fail to respond to my requests for information I will have no alternative but to dismiss you on the grounds that you are absent without leave and my care needs are not being met.

I look forward to seeing you on _____ .

Yours sincerely

(Your name)

3.4 Sickness Absence Agreement Checklist

To be given out with contract of employment

Please tick

- I will notify my employer 2 hours before I start my shift.
- I will keep my employer informed about my absence, progress and likely date of return to work.
- I will get a SCP2 form from my local post office to allow me to self certify for up to 7 calendar days.
- I will liaise with my GP for advice about my condition, help myself to get better and after 7 calendar days provide my employer with a doctor's note.
- I will telephone my employer at least 12 hours before I intend to resume work so that any additional care that has been arranged to cover for my absence can be cancelled.
- I will not put my employer at risk if I have an infectious disease.
- I understand that if my level of sickness absence is no longer acceptable my employer may choose to terminate my employment and dismiss me with appropriate notice.

I understand and agree to this process of supporting and managing my sickness absence.

Signed _____ Dated _____

Copy for employee/copy for employer

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Statutory Redundancy Calculator Paperwork 3.5

Age	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
17	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
18	1	1½	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
19	1	1½	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
20	1	1½	2	2½	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
21	1	1½	2	2½	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-
22	1	1½	2	2½	3	3½	-	-	-	-	-	-	-	-	-	-	-	-	-
23	1½	2	2½	3	3½	4	4½	-	-	-	-	-	-	-	-	-	-	-	-
24	2	2½	3	3½	4	4½	5	5½	-	-	-	-	-	-	-	-	-	-	-
25	2	3	3½	4	4½	5	5½	6	6½	-	-	-	-	-	-	-	-	-	-
26	2	3	4	4½	5	5½	6	6½	7	7½	-	-	-	-	-	-	-	-	-
27	2	3	4	5	5½	6	6½	7	7½	8	8½	-	-	-	-	-	-	-	-
28	2	3	4	5	6	6½	7	7½	8	8½	9	9½	-	-	-	-	-	-	-
29	2	3	4	5	6	7	7½	8	8½	9	9½	10	10½	-	-	-	-	-	-
30	2	3	4	5	6	7	8	8½	9	9½	10	10½	11	11½	-	-	-	-	-
31	2	3	4	5	6	7	8	9	9½	10	10½	11	11½	12	12½	-	-	-	-
32	2	3	4	5	6	7	8	9	10	10½	11	11½	12	12½	13	13½	-	-	-
33	2	3	4	5	6	7	8	9	10	11	11½	12	12½	13	13½	14	14½	-	-
34	2	3	4	5	6	7	8	9	10	11	12	12½	13	13½	14	14½	15	15½	-
35	2	3	4	5	6	7	8	9	10	11	12	13	13½	14	14½	15	15½	16	16½
36	2	3	4	5	6	7	8	9	10	11	12	13	14	14½	15	15½	16	16½	17
37	2	3	4	5	6	7	8	9	10	11	12	13	14	15	15½	16	16½	17	17½
38	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	16½	17	17½	18
39	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	17½	18	18½
40	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	18½	19
41	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	19½
42	2½	3½	4½	5½	6½	7½	8½	9½	10½	11½	12½	13½	14½	15½	16½	17½	18½	19½	20½

4.1 Holiday Request Form

NAME	TOTAL ANNUAL HOLIDAY ENTITLEMENT IN HOURS
------	---

Dates of Holiday	Hours Requested	Date Requested	Authorised Yes/No	BALANCE

Signed: _____ (Employer)	Date: _____
Signed: _____ (Personal Assistant)	Date: _____

..... ✂

Section to be given back to employee within 7 days of request
NAME

Dates of Holiday AGREED	Hours Requested	Date Requested	Authorised Yes/No	BALANCE

Signed: _____ (Employer)	Date: _____
Signed: _____ (Personal Assistant)	Date: _____

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4.2 Protecting Yourself Useful Contacts

Adult Social Care Services:

0161 253 7190 – (Monday to Friday 9am-5pm)

0161 253 6606 – (Monday to Friday 6pm – 8am, 24/7 on Saturdays, Sundays and Bank Holidays, contact the emergency duty Social Worker)

Children’s Social Care Services:

If you are concerned about the welfare of a child (a person under the age of 18), please contact the Children’s Advice and Assessment Team on 0161 253 7333/ 5454

Greater Manchester Police: 0161 872 5050

Emergency Services: 999

If you feel the problem is very serious and warrants immediate action (for example if a person is in imminent risk of harm) you should contact the police.

If you would like further information or advice contact:

Safeguarding Adults Coordinator: 0161 253 5600 – (Monday to Friday)

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Paperwork 5.1

Bury Adult Care Services Workforce Development and Training

Course	Workbook	E-Learning	Classroom	Duration	Renewals
Safeguarding Adults Awareness	•	•	•	½ day	
Mental Capacity Act	•	•		½ day	
Level 2 Health & Safety in Health & Social Care (hygiene/Infection control)			•	1 day	
Level 2 Food Safety			•	1 day	Every 3 years
Moving and Handling People (Induction)			•	1 day	
Moving and Handling People (Refresher)			•	1 day	Annually
Moving and Handling Kinetic (None People)			•	2 hour	
Moving and Handling Kinetic (Refresher)			•	2 hour	Annually
Principles of good record keeping (person centred care / Care Planning)			•	1 day	
Accredited Safe Handling of Medicines Level 2 Administering) service specific/generic route		•	•	½ day	Every 2 years
Emergency First Aid at Work			•	1 day	Every 3 years

The Workforce Development Team are a support service within The Workforce Department of Adult Care Services and act as a conduit between the workforce, both internally and within partnership arrangements including all statutory agencies, the Private, Voluntary and Independent Care Sector and Personal Assistants.

The main function of the team is to provide access to development and training activities for the workforce of Bury Adult Care Services, Bury Adult Training Partnership and Personal Assistants. The team provides, develops, delivers and procures services to meet the needs of the workforce in relation to identified training needs within agreed budgets.

For more information with regards to the content of the courses please see the link below where you will locate Bury Council Adult Care Services Workforce and Development Training Brochure: <http://www.learningpool.com/bury/> (this can be located from the opening page under 'Adult Care Training' followed by 'Workforce Development and Training Booklet')

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5.2 Review Form

Name	Date
	Record of ABC's and D's.
Achievements	
Benefits	
Concerns	
Do next	
Signed	
Signed	

5.3 Continuous Professional Development Portfolio

Training or Review date	Training undertaken and outcomes/Review Achievements