CSIL Online Workbook

A Guide to Applying for and Managing

Choice in Supports for Independent Living

Module 3

How to be a Successful CSIL Employer

Module 1 | What is CSIL and is it for you?
Module 2 | How to Apply for CSIL

Prepared by Spinal Cord Injury BC
Funded by BC Ministry of Health

About This Online Workbook

This three-module Workbook is a how-to resource for Choice in Supports for Independent Living (CSIL).

CSIL is a self-directed option for eligible home support clients in BC to receive their home support services. CSIL clients are people with disabilities who have high-intensity care needs who receive funds from their local health authority to purchase their own home support services. They become “employers” who manage all aspects of their home support from hiring and supervising staff to overseeing how CSIL funds are spent. People who cannot manage CSIL on their own are eligible through a Client Support Group or a representative.

Although the CSIL option may not suit everyone, people who receive home support services through CSIL enjoy the level of freedom and flexibility it provides. They have control over who they hire to provide personal assistance, when services are scheduled to fit with their lifestyle, and how tasks are carried out. Through CSIL funds for personal assistance come directly to the person for the personal assistance they need. The success of CSIL is a credit to how individualized funding supports independence and choice.

This Workbook is a guide for people who want to know more about CSIL: people who already receive home support services, those who intend to apply for home support services or current CSIL employers who want support to manage CSIL.

CSIL can change people’s lives, and this Workbook will educate people on both the responsibilities and benefits of the CSIL option.

Module 1 explains what CSIL is and who is eligible. **Module 2** gives step-by-step information on how to apply. **Module 3** takes you through the detailed process of setting up and maintaining all aspects of CSIL, including many self-help resources and forms you can use or adapt to your needs.

Good luck in your exploration of CSIL.

CSIL Online Workbook
Prepared by Spinal Cord Injury BC (SCI BC)

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How to Use this Workbook

This Workbook is over 150 pages in total, with over 130 pages in Module 3. We recommend you read the shorter Modules 1 and 2 first. Then, if you want to know more about a certain aspect of CSIL, choose a chapter or a topic that interests you in Module 3 and start from there.

To move to and from the Table of Contents in the Workbook PDF:

- click on any topic in the Table of Contents
- click on the Back to the Table of Contents links at the bottom of each page

Finding information

Enter a search term in your PDF viewer, such as “payroll” or “hiring.”

To jump to outside resources:

- click on links to websites. Linked text may appear within a paragraph with text like this or through web links like the one below:
- Click here to go to the SCI BC website www.sci-bc.ca

Chapter Images

We’ve used these images throughout the Workbook to organize the information and bring certain things to your attention.

Chapter Objectives	What You’ll Learn	What Others Say	Topic In-Depth	Activity To Do	Important Tip	Chapter Summary	Chapter Review	Next Steps

In particular, watch for the hand image that mark Activities To Do. We encourage you to do these short exercises to begin to learn about CSIL responsibilities, how to tailor services to your needs and to problem-solve.

Watch for other suggested tasks in bullets like this.

This bullet style notes materials or references included in the appendices.

Resources

- Be sure to look through the appendices for additional documents, resources and a glossary.
- Download the Forms Package, a Word document that contains some of the key Workbook forms for you to use or adapt to your needs.

Table of Contents

Click on any subject to jump to that page of the Workbook.

Introduction

Congratulations on becoming a CSIL employer! You're about to join the community of people who enjoy the freedom and flexibility that CSIL can bring.

This Module provides step-by-step instructions and tips for the most important CSIL activities.

As we start this Module, we would like to emphasize one point that will prevent a range of possible difficulties.

When you become a CSIL employer, you sign an agreement with your local health authority and agree to certain conditions that we will look at in detail in this Module. For now, it's important to understand that by signing the agreement, you commit to:

1. using CSIL funding in specific ways
2. reporting to the health authority monthly
3. being a lawful employer.

Most CSIL employers meet these obligations and succeed on CSIL. When problems occur, they generally flow from not understanding or fulfilling these basic responsibilities.

How to succeed with CSIL

We would like to suggest a few key ideas as you start this Module—ideas about the most important skills or attitudes you can develop in order to manage the various aspects of CSIL.

- ✔ Become a good communicator.
- ✔ Learn what's most important and how to prioritize.
- ✔ Be organized.
- ✔ Develop and keep routines for your CSIL activities, such as managing assistants, record keeping and reporting.
- ✔ Be the boss, but also be flexible.

Chapter 1 | Setting Up

Chapter objectives

In this first chapter, we explain the materials in your Employer Package and how to use them when setting up CSIL.

What you will learn

- What you will receive in your Employer Package and what to do with each of the contents.
- How to set up your CSIL bank account.
- If you are on CSIL Phase II, how to choose your Client Support Group member or representative.
- How to complete the set up phase for CSIL.

What other people have said

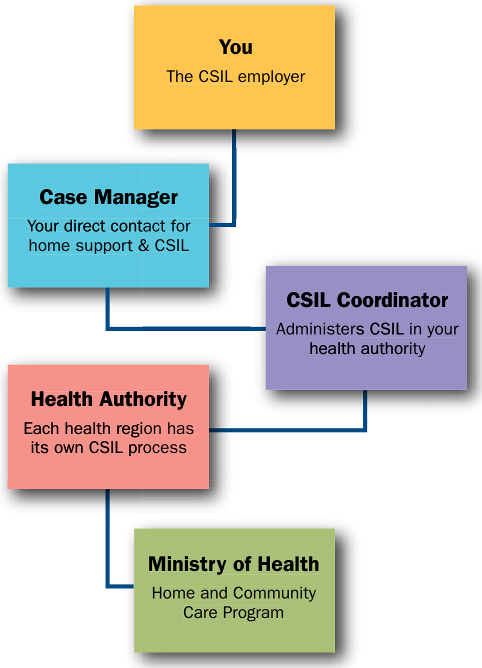
“CSIL is wonderful, it’s not perfect. Reach out to other CSIL employers when you have questions. Networking is very helpful.”

“I applied for CSIL to become more involved in the community, both work-wise and socially, and also because of the flexibility in services it offered. It’s met my expectations beautifully.”

“Simply put, CSIL equals freedom, flexibility and choice. It requires work, organization and accountability, but it’s definitely worth it!”

A Bird's Eye View

CSIL is administered by your local health authority that receives funding from the Ministry of Health Services to provide home and community care services.



It's Like a Business

The most accurate way to describe becoming a CSIL employer is this: it is like starting and maintaining a home-based business.

There is a clear "set up" phase for CSIL that takes some time and energy. CSIL employers who devote the necessary effort to the set-up phase, find that managing CSIL goes much more smoothly. Take your time, put the needed supports and processes in place, and you'll do well.

You and your case manager

You'll be working with your case manager on an ongoing basis. He or she is the health authority representative who is knowledgeable about CSIL. The case manager's responsibility is to assess and review your personal care needs.

They are also a helpful resource for you: they will assist you with current provincial guidelines and policies, CSIL requirements, and can also refer you to other health professionals or community resources.

Reviewing your Employer Package

When you're accepted on CSIL, the CSIL Coordinator will mail you a CSIL Employer Package that includes your set up documents. The contents may vary somewhat among health authorities.

Phase I Package	Phase II Package
1. Two copies of the CSIL agreement 2. Direct deposit forms 3. A sample copy of a monthly financial statement and blank form(s) 4. A budget	1. Two copies of the CSIL agreement forms 2. Direct deposit forms 3. A sample copy of a monthly financial statement and blank forms 4. Notice of Address of the Society 5. List of the First Directors 6. Bylaws Modification Form 7. Constitution

Your CSIL Agreement

The CSIL agreement is your "contract" with the health authority. It describes the responsibilities you have in order to receive direct funding from the health authority. Generally, these agreements are not negotiable. **However, before you sign the agreement, read it carefully and be sure you understand it. If there is anything you're not clear about, ask your case manager for more information.**

Here is an overview of what an agreement will usually include.

- The term or length of the agreement, usually between 1 to 5 years
- The monthly CSIL funding you will receive. This is calculated from your approved number of home support hours multiplied by the current CSIL hourly funding rate.
- Statements about managing, reporting, record keeping and spending funds
- Your responsibilities as an employer
- Information on hiring family members as assistants
- The surplus funding you are allowed to accumulate will be noted in your agreement. Generally, this is equal to a maximum of one month of CSIL funding.
- The health authorities' waiver of liability if you are injured. When on CSIL, you agree to assume the risk of any personal injuries resulting from your services. Your assistants must be covered by WorkSafeBC.

- The required notice period required by the health authority if you will not need services for 14 days or longer
- How and why a CSIL agreement may be terminated
- Information on how to appeal the decision regarding your service.

Read the agreement carefully. Then sign both copies of the agreement and put them aside to return to the health authority.

Opening a bank account

Next, you will need to set up a separate chequing account for the direct deposit of CSIL funds from the health authority.

Why do you need a separate account?

- ✔ CSIL funds must be kept separate from your personal funds.
- ✔ You cannot use CSIL funds for anything other than approved CSIL expenses.
- ✔ You—your representative or appointed person or persons from your Client Support Group—must be the only person who can access the account.

Steps to set up your account

1. Choose the right type of account.
Choose an account that has a good interest rate, low service and chequing fees and provides statements to the last day of each month. This statement period will match your reporting period and simplify bookkeeping.

2. Make a deposit to open the account.
We recommend that you deposit $100 to open the account so you have funds to cover a few expenses, if needed. You can reimburse yourself with a CSIL cheque when the first month's payment is deposited by the health authority.

3. Arrange for direct deposits of CSIL funds from the health authority.
Enter your account information into the Direct Deposit Payment Request form from your Employer Package. Attach a voided cheque from your new CSIL bank account.

Put the direct payment form and cheque aside to return to the health authority.

Keep your CSIL account separate and secure from your personal accounts—and make sure your bank knows the accounts are separate. Set up the account for "cheques only" transactions and service fees.

CSIL account tips

- ✔ You may want to shop around for the best bank or credit union. Some financial institutions offer discounts to people with disabilities.
- ✔ Tell your bank you want this account to be accessed by cheque only, so that every transaction is tracked and balanced.
- ✔ You cannot have a debit card or a line of credit for your CSIL account.
- ✔ Do not give your assistants access to your account.
- ✔ If possible, set up online access to your CSIL account, so you can view your account at any time. Then, you can also print statements for calendar months, if your bank doesn't provide month-end statements.
- ✔ If your personal bank account is with the same bank, order cheques that are easy to distinguish from your personal cheques, e.g., order a different design or colour and/or have "CSIL" printed on the cheques. If there is another bank nearby, consider keeping your CSIL account there to guarantee no confusion between your accounts.
- ✔ Make sure that your bank understands your CSIL account is not a personal account and not to transfer money between your accounts for any reason.

Household and Tenant Insurance

It is recommended that you have household and tenant insurance. This is not an allowable CSIL expense but it is recommended that a CSIL client maintain appropriate liability insurance. For more information contact:

Insurance Brokers Association of BC (IBABC)
http://www.ibabc.org

Phase II

Client Support Group and Representative

Currently there are two options for people who are not able or not fully able to manage their own home support services that are acceptable for CSIL Phase II:

- ✔ the Client Support Group
- ✔ a Representative, set up through a Representation Agreement

If you would like more information on the two above options, ask your case manager. For general information, contact one of the following organizations:

the Nidus Personal Planning Resource Centre and Registry (community organization)

http://www.rarc.ca

the Public Guardian and Trustee of BC (government agency)

http://www.trustee.bc.ca/

Client Support Group requirements

If you will have a Client Support Group (CSG) acting as the CSIL employer on your behalf, there are some requirements.

- ✔ The CSG must be a minimum of three family and/or friends who will serve as director; you can be a fourth if you choose.
- ✔ The CSG must comply with the *BC Societies Act*.
- ✔ Ideally, people on your CSG should know you well and fully support your lifestyle and preferences. They can be your relatives, friends, neighbours, a doctor or anyone else who agrees to help you by being a CSG director.
- ✔ The sole purpose of the CSG is to manage your CSIL services and funds.
- ✔ CSG members must be at least 19 years of age and at least one should live within your community.
- ✔ As a group, they should have the necessary administrative, management and book keeping skills to act as the CSIL employer.
- ✔ You cannot pay your Representative or anyone on your CSG for any CSIL tasks or hire them as a home support assistant.

Throughout this Workbook, the “CSIL employer” for Phase I is the person receiving home support. For Phase II, it is the Client Support Group or representative.

Choosing Members

Being a Representative or part of your Client Support Group can be a rewarding experience. However, it does come with some responsibilities. This Workbook describes these responsibilities in detail. Here are some things to remember:

- ✔ For stability, select people who are willing to commit to at least one or two years.
- ✔ Before people agree to be your Representative or sit on a CSG, be sure they understand and accept the responsibilities. They will be responsible for managing all aspects of CSIL for you and with you.
- ✔ Select one or two people willing to step onto the CSG if someone leaves the group.

The fees for incorporating your CSG (currently about $150) or setting up a representative agreement are allowable CSIL expenses, so save the receipts and send them in with your first monthly financial statement.

Registering as a Society

Before acting as the CSIL employer, the CSG must first be incorporated as a non-profit. The information and forms needed are included in your Employer Package.

- ✔ **Notice of Address of the Society**
  Use the address where the home support service is delivered, and the financial and society records will be kept.
- ✔ **List of the First Directors**
  List your CSG/Directors' names and residential addresses.
- ✔ **Bylaws Modification Form**
  You can create bylaws for your society easily by using the standard bylaws of the Society Act included in the Employer Package. The Package also recommends changes to suit the role and responsibilities of the CSG.
- ✔ **Constitution for the New Society**
  The sample constitution in your package includes two documents:
  1. The name of the society. You can create any name you like for the society, including something as simple as the **"Jane Smith Client Support Group"** society.
  2. The other document lists the purposes of the society as follows.
     - The purposes of the society are:
       - To establish and operate, as a non-profit institution, a health society.
       - To promote well-being through choice and control of home support services.

- To assist in managing home support services.
- To assist in managing the hiring, payment, scheduling and supervision of home support assistant(s).
- To employ any qualified people that may be needed to carry out these purposes.

Complete these four documents and set them aside to return to the health authority.

Returning your completed forms

After following all the steps in Chapter 1, you have now completed all the forms needed to set up CSIL, including:

- ✔ The two signed copies of the CSIL agreement.
- ✔ A voided cheque from your new CSIL account.
- ✔ A signed direct deposit form for your new CSIL account.
- ✔ If you are a Phase II client, copies of all the completed forms needed to incorporate a society or identify your client support group or representative.

Check your Employer Package to see if any other information is requested. For example, you may be asked to provide a copy of the staff backup plan that you created in Module 2.

Make a copy of all these documents for your own records and return the originals to the health authority.

Other resources

Home and Community Care services

If you qualify for home support services, you may also be eligible for a range of services and community care services. These include community nursing, palliative care, hospice care and community rehabilitation.

Visit the Home and Community Care website https://www2.gov.bc.ca/gov/content/health/accessing-health-care/home-community-care

Download *A Guide to Your Care* from this page which provides information on eligibility, services, resources and contact details.

Chapter summary

When you become a CSIL employer, you're basically starting a home-based business. It takes time to prepare for CSIL and become familiar with the various parts of managing your services. Don't expect to understand all the ins and outs of CSIL overnight.

Your employer package includes the documents you need to set up your CSIL bank account, your agreement with the health authority and information on registering your Client Support Group or representative, if you are on CSIL Phase II.

Your CSIL funds must be kept in a separate account and withdrawals made only by cheque, so you can easily track all expenses. Your bank can help you to set up the best type of account.

There are also some requirements for the people who will act as your Representative or Client Support Group. For example, they must have the necessary skills to manage CSIL and they cannot be paid for any services related to CSIL. Your CSG is registered as a society by completing the documents in the Employer Package and returning them to the health authority. Your Representative must be someone designated under the Representation Agreement Act.

Once you've followed all the steps in this Chapter, you've finished the initial set up stage for CSIL.

Chapter Review

What will you receive in your Employer Package?	
On Phase I	On Phase II
1 ____________________	1 ____________________
2 ____________________	2 ____________________
3 ____________________	3 ____________________
	4 ____________________
	5 ____________________
	6 ____________________
	7 ____________________

Why do you need a separate bank account for CSIL?
____
____
____

What are the three steps to set up your bank account?
1. ____
2.____
3.____

What are the “dos” and “don’ts” for your account?
____
____
____
____
____

What are the rules for Client Support Group directors?
What should you consider when you're looking for CSG directors or a representative?
Where would you go to find information on Client Support Group and Representatives?

What forms do you need to complete to register and incororate your CSG as a society?	
1 ______________________	3 ______________________
2 ______________________	4 ______________________

List the materials you need to return to the heath authority before you become a CSIL employer.

Next steps

- Create files for the documents you've received and created so far.
- Proceed to the next Chapter on Budgeting and Reporting.

Chapter 2 | Budgeting and Reporting

Chapter objectives

In this chapter, we explain the essentials of CSIL budgeting and monthly reporting to the health authority.

What you will learn

- Bookkeeping skills are crucial to managing CSIL.
- How to calculate and monitor your monthly budget, including allowable expenses, deductions, surpluses and deficits.
- How to set up employee payroll, including registering with Canada Revenue Agency and WorkSafeBC.
- How to complete your Monthly Financial Statement to the health authority.

What other people have said

"There is a misconception in the community that CSIL involves a lot of paperwork. I wish I had known how simple it is! You just have to keep track of your assistants' hours and the bookkeeper does the rest."

"If I'm not able to provide the wage I'd like to, I do my best to provide additional perks, like access to my computer or help my assistant study for school."

"I prefer to use a bookkeeper because it already takes a lot of time to hire and train assistants. It's also good to have a bookkeeper because payroll and reporting will get done even if you're sick."

Bookkeeping skills are essential

As the employer, you are ultimately responsible for ensuring that your bookkeeping is managed properly and follows all legal requirements or undergo the appropriate training.

If you have bookkeeping skills, you'll be ready to go. If you don't, we recommend that you have someone experienced do your bookkeeping. For CSIL employers who don't have this experience and attempt to keep the books, this is their "Number 1 Biggest Challenge" and can, in rare cases, lead to your removal from CSIL because of financial mismanagement.

A bookkeeper can be paid or be a volunteer, as long as the person is experienced and trustworthy. If you choose to pay someone, this is an allowable CSIL expense, up to a maximum amount. Look at your employer package, ask your case manager for the current maximum for bookkeeping services, or read the CSIL Expense Guidelines:

https://www.health.gov.bc.ca/library/publications/year/2019/CSIL-expense-guidelines.pdf

Places to look for a bookkeeper are:

- Asking for recommendations from other CSIL employers.
- Asking a non-profit society or organization that you are involved with for recommendations.
- Word-of-mouth is one of the best ways to find a bookkeeper. There is a comfort in knowing that someone with direct experience is making the recommendation.
- A web search for someone in your neighbourhood.

If you choose to do your own books, and you don't have previous experience, it is strongly recommended that you take a course in payroll and/or bookkeeping for home-based businesses. You won't regret this investment of time and energy. We also recommend buying one of the many accounting programs available to keep books on your computer. Paper bookkeeping is acceptable, but doesn't offer as many checks and balances for managing your records. If you do your own books, you cannot pay yourself with CSIL funds.

Business resources

To begin the budget and payroll process, you need to register as a business and gather some employer resources. If you have a bookkeeper, consider asking them to do these set-up steps for you. In this Chapter, we explain how to:

1. Register as a business with Canada Revenue Agency.
2. Register as a business with WorkSafeBC.
3. Gather information from the Ministry of Labour, Employment Standards Branch on your responsibilities as an employer.
4. Gather information from employees using TD1 forms.

Canada Revenue Agency

As an employer, you need to request a business number from the Canada Revenue Agency (CRA). You'll use the business number for your monthly remittances of income tax, Canada Pension Plan (CPP) and Employment Insurance (EI).

Register as a business by phone, internet, mail or in person. You'll need the following information:

✔ Your name, address, telephone number and Social Insurance Number (SIN). ✔

If you are on CSIL Phase I, register as a "Sole Proprietor Hiring Domestics." For

Phase II, register as a corporation.

✔ The start date you expect to have employees working for you and the estimated

number of employees.

- ✔ Your chosen pay period for employees. We recommend you choose the standard semi-monthly pay period which is on the 15th and the last day of the month.

CRA website, Business Registration page.
https://www.canada.ca/en/services/taxes/business-number.html

You will receive your business number quickly, usually within a day. After you have registered, CRA will mail you a form to verify the information.

Review the form, make any corrections and return it to CRA.

WorkSafeBC

You also need to register with WorkSafeBC as an employer of “home support services” by contacting WorkSafeBC and asking for a Registration form. The information requested on the form is similar to that on the CRA business form.

In addition, WorkSafeBC will ask the estimated amount of your gross payroll for all employees, per month and per year. These figures will determine how many times per year you must make remittances to WorkSafeBC.

Employment Standards Branch

The BC Ministry of Labour, Employment Standards Branch defines current policies around your responsibilities as an employer, such as minimum wage, hours of work, overtime rates, vacation pay, and so on.

There are many fact sheets and resources available on the Branch website. A “Quick Reference Guide for Employers” is included in the appendices. It lists your main responsibilities, each of which has more resources and information on the website. There is also more on the Branch’s requirements throughout this Workbook.

Employment Standards Branch, Information for domestics and employers page.
http://www.labour.gov.bc.ca/esb/domestics/

TD1 form

You will ask your employees to complete a TD1 Form, “Personal Tax Credits Return,” when they are hired. This will provide you with the information you need to run your payroll, for example, an employee’s Social Insurance Number and their “claim code.” There is more on how to use this form later in this Workbook. You can also see a sample of the TD1 form in the appendices.

Your monthly budget

One of your first CSIL tasks is to create a budget for your monthly finances. The key to managing your CSIL budget responsibly is very simple. If you follow these three rules, you'll avoid difficulties and enjoy success.

- Know your CSIL income.
- Know your CSIL expenses—monthly and accrued (expenses that you do not pay each month, but need to be saved for future months).
- Only use CSIL funding for CSIL-approved expenses and never for personal expenses.

Avoid these Common Budgeting Mistakes

The most common mistakes new CSIL employers make that can lead to overspending are:

- ✖ Lack of understanding of accrued expenses, such as vacation pay.
- ✖ Using more hours than you have been approved for.
- ✖ Overspending on your budgeted items.
- ✖ Infrequent monitoring of books, so overspending is not caught immediately.
- ✖ Using CSIL funds for non-approved or personal expenses.

Budget Overview

The first two keys of successful management—knowing your budget and knowing your expenses—are laid out in your monthly budget.

Your income is the total of your monthly CSIL funding, your client rate contributions (if any) and interest.

The vast majority of your expenses are the same every month and are therefore easy to plan for.

Here are the budget steps we look at next in this Chapter:

1. What's included in your budget
2. Calculating your client rate
3. Allowable expenses
4. Calculating payroll
5. Important budget considerations: surpluses and deficits, and fair wages
6. Keeping records and maintaining privacy
7. Completing your Monthly Financial Statement.

Budget Details

Let's look at the sample monthly budget on the opposite page in detail.

Section 1

At the top, you'll see a monthly CSIL income of $4,500.00.

Columns A and B, calculate different wage rates for your employees based on 75% and 80% of CSIL funding. This is the usual range that CSIL employers use to balance fair wages with funds to cover expenses. If you budget less than 75% for wages, you may have trouble hiring and keeping staff. If you pay more than 80%, you may overspend.

These two columns show how the different wage rates affect your employer costs and your surplus each month.

Section 2

This section calculates the monthly gross wages for your employees at both the 75% and 80% rate. Gross wages equal wages plus vacation pay.

Section 3

These are monthly deductions you pay according to the Payroll Table of Deductions you will get from Canada Revenue Agency (CPP and EI) and your WorkSafeBC assessed amount. You will remit CPP and EI to CRA every month, and to WorkSafeBC according to the payment schedule provided when you registered as a business.

Section 4

This summarizes other monthly or occasional CSIL expenses you have.

Section 5

The final total is the surplus you have left after all the above expenses are paid. You want to accumulate a small surplus each month.

Note: These figures are for illustration only. Use your own figures and current deduction rates.

Sample Monthly CSIL Budget

See how your budget changes when wages are 75% or 80% of your monthly CSIL funding.

Section 1	A	B
1 | Income	$4,500	$4,500
Percentage of income to wages	75%	80%
Section 2		
Wages		
Wages	$3375	$3600
Vacation Pay	$135	$144
2 | Total Gross Wages	$3510	$3744
Section 3		
Payroll Costs		
Income Taxes	$280	$300
Employer CPP	$173	$185
Employer EI	$48	$51
WorkSafeBC	$139	$148
3 | Total Costs	$640	$684
Section 4		
Other Allowable Expenses		
Accounting Fees	$100	$100
Advertising Costs	$25	$25
Bank Charges	$20	$20
Other Costs	$50	$50
4 | Total of Other Expenses	$195	$195
5 | Total of All Expenses [Lines 2+3+4]	$4,345	$4,623
Section 5		
Surplus = Income – All expenses [Lines 1–5]	**$155**	**$123**

Gross Wages is your monthly wage rate, plus vacation pay. This determines the employer's deductions for CPP and EI.

Payroll costs are mandatory deductions you pay each month using figures from CRA tables and your WorkSafeBC assessment.

These are other approved CSIL expenses you may have each month (e.g., accountant) or only occasionally (e.g., advertising).

This is the total of wages, payroll costs and other expenses for the month.

The surplus is the amount you have left at the end of the month when all expenses are paid.

The figures inColumn A & B show how the surplus differs based on your original wage rate of 75% or 80%.

Use this blank sheet to begin calculating your CSIL budget.

Blank Monthly CSIL Budget

Section 1	A	B
1 | Income		
Percentage of income to wages		
Section 2		
Wages		
Wages		
Vacation Pay		
2 | Total Gross Wages		
Section 3		
Payroll Costs		
Income Taxes		
Employer CPP		
Employer EI		
WorkSafeBC		
3 | Total Costs		
Section 4		
Other Allowable Expenses		
Accounting Fees		
Advertising Costs		
Bank Charges		
Other Costs		
4 | Total of Other Expenses		
5 | Total of All Expenses [Lines 2+3+4]		
Section 5		
Surplus = Income – All expenses [Lines 1–5]		

Your client rate

Depending on your income, there may be a daily charge for your home support services. For about 70% of home support clients, there is no client rate.

Your case manager will complete a Financial Profile and Calculation Form to see whether or not you have a client rate. If you do, you'll sign the form which then becomes part of your CSIL file.

You can find the link to the Financial Profile and Calculations form on page 14 of the Appendices

The maximum client rate for any CSIL employer who has earned income or whose spouse has earned income is $300 a month.

If you're assessed for a client rate, there will be two deposits into your CSIL account each month: the amount from the health authority (with your client rate deducted) and the client rate you pay.

Example: If you have a monthly client rate of $250:	
CSIL Monthly Funding	**$4,500**
Amount paid by health authority	$4,250
Amount you put into your CSIL Account	$250
Total in your CSIL account	**$4,500**

Allowable expenses

In your employer package, you'll receive information on allowable CSIL expenses that can be paid for with your CSIL funding. CSIL employers need to manage their services within their monthly funding and only for allowed expenses. If the expense isn't allowable, or is over the allowable amount for an expense, you're required to pay for it out of your own funds. Health authorities may question you about costs that seem inappropriate for a given expense.

CSIL funding is intended to cover the following costs:

- wages and mandatory benefits for assistants
- payroll deductions and other allowable benefits
- administrative costs, such as accounting, bookkeeping, advertising, office supplies, training, scheduling
- personal care services identified in the health authority's care plan for the client
- expenses related to hiring assistants and reporting on use of funds to the health authority, and

- where approved by the health authority, services provided by an agency in the following circumstances:
    - emergencies
    - regular back-up service
    - unique scheduling needs, such as a CSIL Employer contracting with an agency for ongoing shifts that cannot be filled.

Please ask your health authority case manager for full details of the CSIL Expense Guidelines.

But what about...?

If you're unsure if something is an allowable expense, contact the health authority before you use CSIL funds.

Keep receipts for all CSIL expenses. You won't be reimbursed unless you include original receipts with your Monthly Financial Statement. The only exception to this rule is food expenses for live-in assistants.

Calculating payroll

This section is meant for you if you prepare payroll yourself or you simply need a better understanding of what your bookkeeper is doing on your behalf. Remember, even if you don't do the bookkeeping, you do need to understand the process and ensure that the CSIL books are done properly.

There are three main parts of payroll management:

1. Calculating standard monthly deductions and benefits, for remittance to Canada Revenue Agency, i.e., income tax, CPP and EI.
2. Putting aside accrued deductions and benefits, such as WorkSafeBC remittances, vacation pay and funds for your surplus, for things such as termination pay or extra needed hours.
3. Paying your employees in a timely and lawful manner.

Employment Standards Branch BC and Canada Revenue Agency are your key resources for labour requirements and payroll calculation tools.

Contact CRA or visit their website to gather the following resources:

- ✔ Payroll Table of Deductions
- ✔ Employers' Guide to Payroll Deductions
- ✔ Employers' Guide to filing the T4 Slip and Summary Form
- ✔ Blank T4 forms
- ✔ T4 Summary form
- ✔ Blank T1 forms.

CRA website, Businesses main page.
https://www.canada.ca/en/revenue-agency.html

Calculating your hourly rate

To do a detailed calculation of your assistants' salary, you'll work with the monthly budget sample earlier in this section. Using our sample, you'll calculate two possible wage rates at 75-80% of your CSIL funding. These percentages leave 20-25% for payroll costs and allowable expenses.

If you'd like to do a rough calculation of the hourly rate you will be able to pay, here is an example based on the figures from our budget sample (we're using a CSIL rate of $25 for illustration purposes only). The hourly rate range you would likely pay is between **$18.75** and **$20** hour.

	Wages at 75%	**Wages at 80%**
CSIL income of $4,500 per month = Number of approved hours (180) x CSIL hourly rate ($25)	$3,375	$3,600
Hourly rate you pay	$3,375÷180= **$18.75/hour**	$3,600÷180= **$20/hour**
Amount left for payroll costs, expenses & surplus	$1,125	$900

Once you decide on an hourly wage, calculate the salary you will pay your employee(s) twice a month, as well as the deduction(s) and benefits for each paycheque. To do this, use the Payroll Deductions Tables you received from CRA—or their online payroll calculator. There will be more on this later in this Chapter.

You may want to start your wages at a lower rate so you can provide raises. This way, if you have staff with different skills and experience, you'll have room to pay experienced staff more.

Income Tax

Monthly

The CRA Payroll Deduction Tables list the monthly deductions you will make from each paycheque and the contributions you make as the employer: income tax (federal and provincial), CPP and EI.

For example, the CPP remittances are a combination of the amount an employee pays (the CPP “deduction”) and the amount you pay (the employer “contribution”). The income tax deductions are provided in tables, and the CPP and EI rates are a flat rate percentage of the employee’s gross wages.

Here is an overview of this process each month.

Calculating pay and deductions		
Employee Wages		
+ Vacation pay (if any)		
Total Earnings		
Deduct CPP	Employer CPP	**1 | CPP Remittance**
	(same as employee CPP)	(= Employee CPP + Employer portion)
Deduct EI	Employer EI	**2 | EI Remittance**
	(is 1.4 times employee EI)	(= Employee EI + Employer portion)
Deduct Federal Tax		**3 | Tax Remittance**
According to employee TD1 claim code		
Deduct BC tax		
According to employee TD1 claim code		(= Employee federal + BC tax deductions)
Net Wages		**Total CRA Remittance 1+2+3**
= Earnings - CPP - EI - Fed. Tax - B.C. Tax		= CPP + EI + Tax
Payable to employee		**Payable to Receiver General**

Please see the appendices for a payroll calculation example with figures.

Here is an example of the CRA Payroll Deduction Tables. Please note, it is for a weekly pay period, rather than a bi-monthly pay period.

Figure 1

$615 weekly under claim code 1
615 $ par semaine selon le code de demande 1

Federal tax deductions

Effective April 1, 2009
Weekly (52 pay periods a year)
Also look up the tax deductions in the provincial table

Retenues d'impôt fédéral

En vigueur le 1er avril 2009
Hebdomadaire (52 périodes de paie par année)
Vérifiez aussi les retenues d'impôt dans la table provinciale

Pay Rémunération		Federal claim codes – Codes de demande fédéraux										
		0	1	2	3	4	5	6	7	8	9	10
From De	Less than Moins de	Deduct from each pay Retenez sur chaque paie										
560 –	568	76.45	46.50	43.65	38.00	32.30	26.60	20.90	15.20	9.55	3.85	
568 –	576	77.55	47.65	44.80	39.10	33.40	27.70	22.05	16.35	10.65	4.95	
576 –	584	78.70	48.75	45.90	40.20	34.55	28.85	23.15	17.45	11.75	6.10	0.40
584 –	592	79.80	49.85	47.00	41.35	35.65	29.95	24.25	18.60	12.90	7.20	1.50
592 –	600	80.90	51.00	48.15	42.45	36.75	31.10	25.40	19.70	14.00	8.35	2.65
600 –	608	82.05	52.[illegible]0	49.25	43.60	37.90	32.20	26.50	20.80	15.15	9.45	3.75
608 –	616	83.15	53.25	50.40	44.70	39.00	33.30	27.65	21.95	16.25	10.55	4.90
616 –	624	84.30	54.35	51.50	45.80	40.15	34.45	28.75	23.05	17.35	11.70	6.00
624 –	632	85.40	55.45	52.60	46.95	41.25	35.55	29.85	24.20	18.50	12.80	7.10
632 –	640	86.50	56.60	53.75	48.05	42.35	36.70	31.00	25.30	19.60	13.90	8.25

Figure 2

$615 weekly under claim code 1
615 $ par semaine selon le code de demande 1

British Columbia provincial tax deductions

Effective April 1, 2009
Weekly (52 pay periods a year)
Also look up the tax deductions in the federal table

Retenues d'impôt provincial de la Colombie-Britannique

En vigueur le 1er avril 2009
Hebdomadaire (52 périodes de paie par année)
Vérifiez aussi les retenues d'impôt dans la table fédérale

Pay Rémunération		Provincial claim codes – Codes de demande provinciaux										
		0	1	2	3	4	5	6	7	8	9	10
From De	Less than Moins de	Deduct from each pay Retenez sur chaque paie										
591 –	595	28.15	19.05	18.00	15.95	13.90	11.85	9.80	7.75	5.70	3.65	1.60
595 –	599	28.35	19.25	18.20	16.15	14.10	12.05	10.00	7.95	5.90	3.85	1.80
599 –	603	28.55	19.45	18.40	16.35	14.30	12.25	10.20	8.15	6.10	4.05	2.00
603 –	607	28.75	19.60	18.60	16.55	14.50	12.45	10.40	8.35	6.30	4.20	2.15
607 –	611	28.95	19.80	18.80	16.75	14.65	12.60	10.55	8.50	6.45	4.40	2.35
611 –	615	29.10	20.[illegible]0	18.95	16.90	14.85	12.80	10.75	8.70	6.65	4.60	2.55
615 –	619	29.30	20.20	19.15	17.10	15.05	13.00	10.95	8.90	6.85	4.80	2.75
619 –	623	29.50	20.35	19.35	17.30	15.25	13.20	11.15	9.10	7.05	5.00	2.95
623 –	627	29.70	20.55	19.55	17.50	15.45	13.40	11.35	9.25	7.20	5.15	3.10
627 –	631	29.85	20.75	19.70	17.65	15.60	13.55	11.50	9.45	7.40	5.35	3.30

These tables, or the CRA online deduction calculator (https://www.canada.ca/en/revenue-agency/services/e-services/e-services-businesses/payroll-deductions-online-calculator.html), list the income tax deductions you must make based on your rate of pay and your employee's "claim code." The claim code is based on the TD1 form your employee fills out for you when hired. The CRA Payroll Deductions Tables document will also list the current rate of CPP and EI deductions.

Yearly

At the end of each calendar year, you must also submit a T4 Income Tax form for all of your employees. This form lists employees' total wages for the year, including vacation pay, overtime pay, and deductions. See the appendices for a sample T4 form.

Employees' income taxes are calculated using their gross monthly pay and the claim code they entered into their TD1 form.

More on the Claim Code

The claim code is based primarily on a person's annual income. The higher the claims on the TD1, the less tax is deducted. Employees need to fill out the form accurately and choose their claim code. They may, for example, choose to enter an amount that is different from the income they receive from you because they have income from other sources as well, or they know their annual income will be low enough to be non-taxable. **In either case, the claim code is the employee's decision. If you know your employee has another job, you could recommend that they speak with an accountant for advice on completing their TD1.**

When the employee files their income tax return, a refund will be received if too much tax was deducted from their paycheques. If not enough tax was deducted, the employee will owe CRA the balance.

Here is a sample from the CRA Payroll Deduction Tables showing various claim codes.

Chart 1B (April 1, 2009) – Tableau 1B (1er avril 2009)
Federal claim codes – Codes de demande fédéraux

Total claim amount ($) Montant total de la demande ($)	Claim code Code de demande	Total claim amount ($) Montant total de la demande ($)	Claim code Code de demande
No claim amount – Nul	0	20,235.01 – 22,207.00	7
Minimum – 10,375.00	1	22,207.01 – 24,179.00	8
10,375.01 – 12,347.00	2	24,179.01 – 26,151.00	9
12,347.01 – 14,319.00	3	26,151.01 – 28,123.00	10
14,319.01 – 16,291.00	4	28,123.01 and over – et plus	X
16,291.01 – 18,263.00	5	The employer must do a manual calculation of tax. L'employeur doit faire le calcul manuel de l'impôt.	
18,263.01 – 20,235.00	6	No withholding – Aucune retenue	E

Chart 2 – Tableau 2
2009 British Columbia claim codes – Codes de demande de la Colombie-Britannique pour 2009

Total claim amount ($) Montant total de la demande ($)	Claim code Code de demande	Total claim amount ($) Montant total de la demande ($)	Claim code Code de demande
No claim amount – Nul	0	19,918.01 – 22,027.00	7
Minimum – 9,373.00	1	22,027.01 – 24,136.00	8
9,373.01 – 11,482.00	2	24,136.01 – 26,245.00	9
11,482.01 – 13,591.00	3	26,245.01 – 28,354.00	10
13,591.01 – 15,700.00	4	28,354.01 and over – et plus	X
15,700.01 – 17,809.00	5	The employer must do a manual calculation of tax. L'employeur doit faire le calcul manuel de l'impôt.	
17,809.01 – 19,918.00	6	No withholding – Aucune retenue	E

Canada Pension Plan

Both you and your employees contribute the same amount to CRA for CPP each paycheque—through employee deductions and through your employer contribution. The Payroll Deductions Tables will tell you the current CPP rate.

Employment Insurance

Both you and your employee also contribute to EI. As the employer, you currently contribute 1.37 times the amount deducted from each employee's paycheque for EI. There is a maximum payment each year; if your employee reaches the maximum, you stop deducting EI from their pay cheques.

WorkSafeBC

When you register as a business with WorkSafeBC, they will send you information on how often you are required to remit payments to them. This can vary from monthly to annual payments based on your total wages to all employees. WorkSafeBC remittances are calculated at 1.09 percentage of gross wages based on the 2010 classification of home support services. This rate may be reduced over time if you have no injury claims among your staff.

Vacation pay

When you hire staff, you immediately start accumulating vacation pay for them at 4% of their gross wages. According to Employment Standards, you are not obligated to give vacation pay until after the first year of employment. However, you can choose to provide it sooner if you like.

Vacation pay is equal to at least two weeks per year, after 12 months of employment (which equals 4% of their gross wages), and three weeks after five years of employment (which equals 6% of their gross wages). This can be paid to the employee:

- on each paycheque
- held by you until they book vacation time
- at a specific time each year that you and your employee agree upon
- paid out when the employee is terminated.

The payment method is up to you as the employer, just be sure to let employees know your policy on vacation pay as part of the hiring process.

If you are holding the vacation pay for your employee, this becomes an accrued amount in your CSIL account and must not be spent on other expenses.

Your Employment Standards Branch materials will have all the details on current rates of vacation pay and the options for payment.

On pay day

Every pay day, you are required to give each of your assistants their paycheque and a written statement for the pay period that includes the following information:

- ✔ Assistant's name and address
- ✔ Employer's name and address
- ✔ Gross and net wages
- ✔ Hours worked
- ✔ Wage rate
- ✔ Overtime pay
- ✔ Vacation pay
- ✔ List of all the deductions and the amounts.

You can buy these statements from a stationery store or, if you have an accounting program, it will print this information for each paycheque.

If you use the CRA online payroll deduction calculator, your payroll and deductions can be printed out as a payroll statement.

Employee Pay Statement Sample | For One Pay Period

Employer: Mary Smith			
Address: 555 Crescent Road, Vancouver, BC			
Date: February 15, 2010			
Work Period: February 1 - 15, 2010			
Employee name: Grace Johnson			
Address: 56 4th Street, Surrey, BC			
Payments	**Hours**	**Rate**	**Total**
Regular	53.00	17.00	901.00
Overtime			
Vacation pay accrued			223.00
Gross Insurable Earnings			901.00
Less: Deductions			
Canada Pension Plan			37.38
Employment Insurance			15.59
Income Tax			64.91
Total Deductions			117.88
Net Payable			783.12
Keep This Record of Your Earnings			

Benefits

In addition to the standard benefits you're required to offer employees (i.e. wages and vacation) you can consider optimal benefits to attract and retain employees (i.e. medical premium, sick pay, extended medical and dental).

There are two types of benefits you can offer assistants as additional incentives.

Taxable benefits

These are considered income and are taxable. Examples of taxable benefits include a food allowance for live-in assistants.

Non-taxable benefits

These are not considered income and are not added to an assistant's total gross wages. Examples of non-taxable benefits include extended medical and dental plans.

Please ask your health authority case manager for full details of the CSIL Expense Guidelines.

If you do choose to provide optional benefits for one home support assistant, you are not legally required to do the same for your other assistants. However, it's good business practise to treat your employees equally.

Employment Standards Branch.
http://www.labour.gov.bc.ca/esb/domestics/obligations.htm

Termination pay

If you terminate or fire an employee, you owe them the following:

- Outstanding wages, up to and including the day of termination
- Vacation pay
- Termination pay.

If you have been accruing vacation pay and termination pay, you will have enough funds in your CSIL account to cover these expenses.

See the Terminating Employees section in Chapter 5 for more information.

Record of Employment Form (ROE)

The ROE is a form you are required to give your employee when he or she ends their employment with you, is terminated or goes on a leave of absence, such as parental leave. The form is used to determine whether or not the employee is eligible for Employment Insurance benefits, so it's very important to enter the reason for their end of employment correctly.

The ROE is handled through Service Canada. You can request ROE paper forms from the agency or submit them electronically through the Service Canada website. If you want to file electronically, you need to register as a business with Service Canada at this web page:

Service Canada, Record of Employment page.

http://www.servicecanada.gc.ca/eng/ei/employers/roe_guide.shtml

You must complete and return the ROE to Service Canada within five days of your employee's interruption of earnings when they quit, are laid off or fired, or have seven consecutive calendar days without work.

Important budget considerations

Surpluses and deficits

You should always watch your CSIL account carefully, but especially for the first few months. Do you have money left at the end of the month or are you overspending? Do you see a pattern?

Currently, CSIL employers are allowed to accumulate a one-month surplus of their CSIL funding for extra personal care hours when you have an increase in your personal care needs on a short term basis. Most CSIL employers find that a two-week surplus is enough.

The health authority will deduct any funds over a month's surplus from one of your next CSIL deposits (check with your health authority for their policy, if needed). Health authorities must give 30-days notice before deducting surplus funds.

You also do not want to overspend. If you find you are over budget, you need to find out why (see Avoid These Common Budgeting Mistakes earlier in this Chapter). It is rare, but CSIL employers who overspend regularly risk having their agreement terminated. If you are spending more than you receive for CSIL, ask a family member or a bookkeeper for help on how to adjust your budget accordingly.

If you are consistently overspending, it may also mean that you were not assessed for enough home support hours. If you are consistenty under budget, you may have been assessed for more hours than you need. In each case, talk to your case manager about your hours and your budget concerns.

A fair wage, longer term staff

Being an assistant can be a challenging job. As an employer, you want to treat your employees well and create a positive working environment so they will be more likely to stay in your employment. Employee turnover is time-consuming and employers are wise to avoid it as much as possible.

A fair wage is important to consider when designing your budget priorities. Ask other CSIL employers about the current wage range for CSIL assistants.

However, some employers may not be able to offer a high rate of pay because of the way they are using their funded hours. If your hourly rate is low, think of non-financial ways to make working for you appealing. We give some suggestions in Chapter 5, under Take Care of Your Employees.

Completing Your Monthly Financial Statement

A routine part of CSIL management is the Monthly Financial Statement. Your Employer Package contains a sample of a completed statement. If you request it, health authorities will provide an electronic version of this statement for you to fill in.

The purpose of the Monthly Financial Statement is to check that your financial records match—or "reconcile" with–the bank records for your CSIL account.

The keys to an easy reconciliation are:

1. Opening a bank account that provides month-end statements to match your CSIL reporting period.
2. Keeping records of all transactions on the CSIL account.

The Monthly Financial Statement forms may vary slightly among health authorities, but most contain the following sections:

- ✔ **Documents Checklist**
  A list of all the documents and receipts you need to return with the Statement. Note whether your health authority requires original receipts or if photocopies are accepted.
- ✔ **Bank Reconciliation**
  Allows you to enter all of the financial activity on your CSIL account directly from your bank statement.
- ✔ **Monthly Financial Reconciliation**
  Enables you to calculate the amount of funds left in the CSIL bank account after all expenses for the month are paid. The Bank Reconciliation and Monthly Financial Reconciliation must be the same amount.
- ✔ **Surplus Funds Calculation**
  Calculates expenses or accrued expenses for the month, leaving you with the surplus funds for the month.
- ✔ **Summary of hours and staff**
  Provide the month's summary of all your staff's wages, total hours and information on any staff who may be family members.

Keep track of which month your CSIL funding is for! For example, the funding for April may be deposited into your account March 23. Remember that these funds are meant for next month's operating expenses and not for spending in March.

Statement Sample

Here is a Monthly Financial Statement for the first month on CSIL. Please note that the form may differ slightly among the health authorities.

CHOICE IN SUPPORTS FOR INDEPENDENT LIVING
MONTHLY FINANCIAL STATEMENT

Client Name: MARY EMPLOYER
Month of : February

Return to:

Have you attached the following:
- ☐ Copy of Bank Statement?
- ☐ Copy of Revenue Canada or CCRA Source payment form?
- ☐ Copy of WorkSafeBC payment form?
- ☐ Original receipts for all other expenses

A checklist of documents to attach to the report.

This is a record of all the financial activity in your CSIL bank account. Enter information from your monthly bank statement.

MONTHLY FINANCIAL RECONCILIATION

Cash Balance from last month	(A)	$ -
FUNDS RECEIVED		
Health authority		$ 4,500.00
Interest		0.15
Client Contribution		
Other (specify):		
Total Funds Received for Month	(B)	$ 4,500.15
FUNDS DISBURSED		
Net Wages		1,590.51
Vacation Pay		
WorkSafeBC		
Revenue Canada Remittances		366.40
Other Benefits		
Payroll/Bookkeeping		
Advertising		
Bank Charges		6.00
Other (specify): Office supplies		12.83
Other (specify):		
Total Funds Disbursed for Month	(C)	$ 1,975.74
Cash Balance (A+B-C) - must equal Bank Balance	(D)	$ 2,524.41

Lists all your CSIL income—health authority deposits, your contributions, interest, etc.,—and all CSIL expenses—payroll, bookkeeping, ad costs, etc

This amount is entered in next month's statement in the "Cash Balance from Last Month," line A above.

BANK RECONCILIATION

Ending Bank Balance	(A)	$ 8,198.20
Add: outstanding deposits:		
1)		
2)		
subtotal	(B)	$ -
Less: outstanding cheques:		
1) # 3 Wages - John Doe		$ 807.39
2)		
3) # 5 CRA / Receiver General		366.40
4)		
5)		
6) Next month's funds		4,500.00
7)		
8)		
9)		
10)		
11)		
12)		
13)		
14)		
subtotal	(C)	$ 5,673.79
Bank Balance (A+B-C) - must equal Cash Balance		$ 2,524.41

SURPLUS FUNDS

Cash Balance for Month	(D)	$ 2,524.41
Total Accrued Vacation Pay	(E)	73.44
Total Accrued WorkSafeBC	(F)	20.01
Other (specify)	(G)	
Surplus Funds (D-E-F-G)		$ 2,430.96

A breakdown of amounts left over from the month after expenses and accruals.

EMPLOYEE INFORMATION

Gross wages	$ 1,836.00
Total Hours Paid in Month	108.00
# of employees that are relatives?	0
Nature of Relationship if Relative:	
Total of all Gross Wages paid to Relatives	$ -

A summary of your wages, hours and status of workers for the month.

I certify to the best of my knowledge this form is accurate and complies with the Health authority C.S.I.L contract.

SIGNATURE:

Chapter summary

As a CSIL employer, it's your responsibility to keep accurate financial records, manage payroll and deductions, and report monthly to the health authority. Therefore, we recommend that you either have an experienced person do your CSIL bookkeeping or you take some bookkeeping training.

You can find your employer resources and requirements from three key agencies: Canada Revenue Agency (payroll and how to calculate most deductions), WorkSafeBC (your WorkSafeBC remittances) and Employment Standards Branch (requirements for being an employer, such as hours of work, vacation pay and record keeping). As an employer, you also need to be aware of optional benefits, handling staff terminations and preparing Records of Employment.

Budgeting your CSIL funds, and keeping your budget on track, will be straightforward if you remember these simple rules: know your income, know your expenses and use CSIL funding only for approved expenses. If you have income over a given amount per year, you are required to make a contribution, called a client rate, to your home support services.

You'll monitor your monthly spending for both surpluses and deficits. You are allowed to have a surplus of up to one month of CSIL funding, though two weeks is enough in most cases. And, if you find you are overspending, you need to quickly identify why to correct for the next month.

The Monthly Financial Statement is your routine report to the health authority on your CSIL spending. It reconciles your bank statement with your records of CSIL income and expenses.

Chapter review

Do you have the skills to handle your own bookkeeping? If not, where will you look for a qualified bookkeeper?
Which three agencies will provide the needed resources to set up your bookkeeping?
1. 2. 3.
What are the three keys to problem-free budget management?
1. 2. 3.
What are some common budgeting mistakes to avoid?

What are the standard payroll expenses you have as an employer?
What is the "client rate?"
How do you know if an expense is an allowable CSIL expense?
What are the three key parts of payroll management?
1. 2. 3.
What are your monthly and yearly responsibilities to Canada Revenue Agency?

How much of a surplus are you allowed to accumulate?
What is the purpose of your surplus?
What is the purpose of the Monthly Financial Statement?
What are the five sections usually contained in the Monthly Financial Statement?
1.
2.
3.
4.
5.

Next steps

We covered a lot in this Chapter. Make some notes on:

- topics you found a bit difficult and need to read again
- forms you filled in and want to keep
- blank forms in the Workbook that you want to use later.

CHAPTER 3 | Making CSIL Your Own

Chapter objectives

In this Chapter, we recommend some key steps to follow before advertising for employees.

What you will learn

The importance of defining your priorities, preferences and needs, before you start hiring.

- How to create a job description and employee guidelines.
- How to choose the scheduling and staffing options that work for you.
- Deciding on your training period.
- Preparing everything you need to advertise for staff.

What other people have said

“Freedom! Depending on the arrangements, you can choose to meet your assistant somewhere, like at the mall. They can meet you at an arranged time to help you to the bathroom and then go home with you. And you decide which assistant is best for you, not someone else.”

“Plan for just-in-case scenarios. Think carefully about the amount of time you need to do something when your disability is active. For example, when I crack a rib and go to work I’m slower, so I need to plan for the extra time it takes me to get ready to go to work.”

“Finding the right employees, that fit with your lifestyle, personal needs and personality will make a huge difference in your day-to-day enjoyment. Good employees do the job well, are flexible, are pleasant to be around and communicate well–they support you and don’t take a lot of energy and time to manage.”

Finding a good fit

How do you find the best possible employees for you? Here are the key steps we look at in this chapter.

1. Know what you are looking for
2. Are you ready to manage an assistant?
3. Create a job description
4. Write your Employee Guidelines
5. Choose your schedule and shifts
6. Shift-work assistants or live-in?
7. Decide on your training period.

We look at some of these topics in more detail later in this Module, such as the job description and scheduling. The purpose of this Chapter is for you to develop a basic idea of the job, so you are ready to advertise for staff.

Know what you are looking for

As Yogi Berra said, "If you don't know where you are going, you might wind up someplace else."

Before you look for assistants, be clear who and what you're looking for. Spend time answering questions like these:

- ? **Is there a particular kind of personality that you're comfortable with?** You will be spending a lot of time with your staff, including time doing personal care. Are you most at ease with people who are outgoing, reserved or energetic? People that work well on their own?
- ? **What kind of experience do you want your assistants to have?** Do you want someone who has previous experience or someone who doesn't? There are pros and cons to both. If you need a lot of personal care, you may prefer staff who have experience in those areas and do not need training. Other people prefer assistants who have no previous experience because they enter the job without set ideas and are more open to your way of doing things.
- ? **What other qualities or skills are important to you?** For example, trustworthiness, punctuality or being organized?

You can use the form below to begin thinking about qualities or skills that are important in your staff. Add other qualities or skills to the list, and rate them as an "Absolute Must," "Preference," or "Not So Important." You'll begin to develop a profile of your ideal employees that you can use later to create your job description, Employee Guidelines and advertisements.

What qualities and skills should your assistant have?

	Absolute Must	Preference	Not As Important
Qualities			
Outgoing			
Tidy			
Experienced			
Physically strong			
Skills | Assets			
Cooking			
Driver's License			
Vent training			
?			
?			
?			

A personal fit is important. The more your assistant matches your desired personal qualities, the more chance you have of a longer-term working relationship.

Create a job description

In Module 2, you created your Supported Lifestyle Plan detailing all of the tasks you need done during your day. Now, you'll use the Plan to create a job description that you can give to applicants, either when they want more information about the position or at their interview. You can also use the Plan to create daily Task Sheets–a checklist of tasks to be done each day–if you choose to use them.

A good job description will:

- ✔ summarize the information in your Supported Lifestyle Plan
- ✔ give employees clear information on job duties and expectations
- ✔ list the skills, experience or personal qualities you're looking for in an employee
- ✔ act as a guide for you to evaluate applicants' suitability and current employees' performance.

Your needs will change over time. Your health may change or you may start going to school. Include flexibility in your job description and ensure that new staff understand if and how their job may change.

Lifestyle Plan to Job Description

Your Plan breaks down all your needed tasks into the time of day and the amount of time each takes. **To translate this information into a job description, you want to review your plan and summarize the tasks into a shorter and simpler format.** You can do this by organizing tasks according to:

1. time of day (morning, afternoon or evening) and/or
2. type of task (personal care, safety maintenance activities or specialized health care).

Examples:

- I require the most assistance in the morning and at night. Morning tasks include assistance with showering, dressing and breakfast. Evening tasks include bladder care, dressing and preparation for bed.
- My assistant's tasks are focused on personal care, including bowel and bladder care, showering and dressing. Tasks also include some household duties, such as food preparation and clean up during the afternoon and evening shifts.

Job descriptions come in all shapes and sizes, and reflect the personality and specific needs of the employers.

Here is an example of an assistant job description. See what you would add or change for your job description.

Example of a Job Description

Job Title: Personal Assistant for John Doe
Specific Duties and Responsibilities: • Assists with personal care services, such as showering, dressing, oral hygiene and grooming. • Assists with bowel and bladder care by performing catheterization, emptying catheter and changing colostomy drainage bags. • Assists with transfers, range of motion exercises and other stretching exercises. • Carries out the above duties at John Doe's home, school or place of work as arranged with John. • Performs safety maintenance activities such as cleaning up after meals and laundry of soiled bedding and clothing. • Training new assistants.
Qualifications: **Education:** Grade 11 or equivalent preferred.
Experience: Previous related experience an asset.
Physical: Must be in good health and be able to physically carry out the tasks and expectations outlined. Must agree to a TB test.
Other Requirements: • Must be able to communicate competently in English, in oral and written form and understand written and oral instructions. • Must be willing to undergo a criminal record search. • Must have a form signed by your doctor stating you are mentally and physically fit for the job. • Must be willing to be trained as required for the application of medication, performance of physiotherapy, stretching, etc. • Must be able to establish and maintain harmonious relationships with John Doe, his family, professional associates, friends, etc. • Must be willing to maintain confidentiality. • Must be vaccinated against COVID-19.

Use this table to begin shaping your job description.

Your Job Description

Tasks:
Qualifications:
Other requirements:

Many CSIL employers have their experienced assistants train new assistants. If you expect assistants to train, be sure to include this in your job description and during the orientation for employees.

Write your Employee Guidelines

We recommend creating a list of Employee Guidelines. These go beyond job duties to your expectations about behaviour, communication, use of your property—whatever's important to you.

It's important to start off on the right foot with a new employee. Ensure that expectations are clear, by reviewing a clear set of guidelines when they start in your employment. If you treat your staff with dignity and respect, and provide clear expectations, your staff will treat you well and be longer-term employees.

You can include these guidelines in your Employment Contract that we discuss later in this Chapter.

Here are some examples that one CSIL employer includes in their Guidelines. You can see a full sample in the appendices of this module.

Communication and Respect

If there is a problem concerning anything between us or with anyone you are dealing with on my behalf, we will both be sure to bring this to each other's attention respectfully. And, we will deal with it privately, not in front of other people. How we interact in public reflects on both of us and especially on how I am perceived as an independent person and professional.

Tardiness

It is unacceptable to be late for your shifts or when I have asked you to come back at a specific time.

Security

When letting visitors into the apartment, please keep all room doors closed. It is important that the security of my home be maintained at all times.

Confidentiality and Gossip

Any personal information you see or hear while you are working for me is confidential. I count on staff to respect my privacy and not share my personal information with anyone else, including the health authority.

Some CSIL employers use an Oath of Confidentiality to emphasize the importance of privacy, for both personal and business information. You can see a sample in the appendices.

The following table lists several possible guideline categories. Check off those that seem important to you and use them to begin writing your own guidelines in the form Your Employee Guidelines provided below.

✔	**Guideline**	✔	**Guideline**
❏	Communication and respect	❏	Days off
❏	Tardiness	❏	Tidiness
❏	Security	❏	Home phone use
❏	Confidentiality and gossip	❏	Your personal business
❏	Liability of the employer	❏	Borrowing money
❏	Drinking and drugs policy	❏	Employee's visitors
❏	If you are sick	❏	If I am working
❏	Use of my personal van	❏	Don't leave without informing me
What else would you add to these guidelines? Use the space below.			
❏		❏	
❏		❏	
❏		❏	

Your Employee Guidelines:

Create an Employment Contract

Employment Standards requires employers to have some form of Employment Contract, signed by both the employer and employee. We also recommend a contract so the job description, benefits and any other requirements are clearly laid out and agreed upon.

Employment Standards requires that the Employment Contract include at least this information:

- job duties
- hours of work per day and per week
- wage rate (at least the current minimum wage).

We recommend that you also include:

- information on how you pay out vacation pay
- a sick days policy
- pay days
- a length of training period and probationary period
- reasons for termination and termination notice
- other job requirements, such as criminal or medical record checks
- employee performance evaluation schedules
- a list of other documents that are part of your agreement, for example your Employee Guidelines or an Oath of Confidentiality

Once you have offered the job to someone, and they've passed any medical or record checks you've chosen, make sure they read and sign the Employment Contract. Keep the contract in their file.

Please see a sample contract on the next page.

Sample Employment Contract

January 23, 2010

Paul Smith
333 W. 23rd Avenue
Terrace, BC V3T 3C5

Dear Paul:

This letter offers you the job as one of my Personal Assistants, starting March 1/10. Below, you'll find details about the position and the documents that are part of this Employment Contract. Please note that this offer of employment depends on positive medical and criminal records checks.

Work Schedule
To start, your shifts will be Monday to Friday from 6:30 a.m. to 9:30 a.m. 3:30 p.m. to 5:30 p.m.

Salary
Your monthly salary is $1850 and will be paid on the 15th and the last day of each month.

Training and Probationary Period
I have a five-day paid training period for new staff. This is a chance for both of us to ensure we can work well together. After a successful training period, you'll begin the probationary period that ends three months after you are hired. At this time, you'll have a performance evaluation. If I feel there are significant problems in your performance, your employment may be terminated at that time, without termination pay.

Termination
Where I consider termination for "just cause" to be the only option, I will follow Employment Standards regulations on the amount of termination pay you are owed based on your employment. Examples of termination for just cause are: repeated poor job performance in spite of written or verbal notice of the problem, theft or coming to work intoxicated.

Performance Evaluation
I give all staff short performance evaluations after the probationary period and then every 6 months thereafter. It's a way for both of us to discuss strengths and areas for improvement.

Sick Days
Unless it is an emergency, both you and I must give at least two days notice of absence or a change of shifts.

Requirements
Please provide me with your completed TD1 form by March 1/10.

By signing below, you agree to the conditions laid out in this letter, and in the attached Job Description and Employee Guidelines.

Thank you, and I look forward to working with you,

David Yee

Signature ___________________________________

Use the table below to write down ideas for your Employment Contract.

Your Employment Contract

Work Schedule
Salary
Training and Probationary Period
Termination
Performance Evaluation
Sick Days
Requirements
By signing below, you agree to the conditions laid out in this letter, and in the attached Job Description and Employee Guidelines.

Choose your schedule and shifts

Once you have your home support hours approved, you have the freedom to schedule assistant shifts according to your routines and preferences. The best scheduling for you will take some thought and will most likely change over time. Again, your Supported Lifestyle Plan provides a good outline of the assistance you need and when you need it.

We discuss scheduling in more detail in Chapter 5. For now, you will design a draft schedule that you can use for hiring.

Here are the steps to designing your schedule:

- ✔ **Develop a weekly schedule.**
  Prioritize your daily tasks. Do all tasks need to be done every day, or could some be done two or three times a week? From your priorities, develop a one-week schedule with tasks for each day.
- ✔ **Balance your week.**
  Aim for days that are fairly equal in tasks: avoid some days that are exhausting and some days where assistants have too little to do.
- ✔ **Decide on daily shifts.**
  Schedule assistants' shifts based on the amount of assistance you need each day, the times of day you need it and what you can afford to pay.
- ✔ **Decide on how many assistants you need.**
  You need to stay within Employment Standards rules for the minimum and maximum number of work hours per shift–the current minimum is two hours, the maximum is eight hours. So, if you decide that you require assistance 12 hours a day, you will have at least two shifts per day and therefore at least two assistants.

  You should try to have at least two assistants at a minimum and, if you can provide enough work for three or four, this is even better. This allows you the flexibility to switch shifts when necessary or to call someone else in if the scheduled assistant is ill.
- ✔ **Work with people's strengths.**
  Try to slot assistants into shifts that fit with their strengths. If you find someone is particularly good at cooking or cleaning, schedule them in for those tasks. Or, if one of your assistants is not a morning person, schedule them in at other times of day.

Follow Employment Standards

The information you gathered from Employment Standards BC will provide you with all the information on your employer responsibilities, such as minimum wage, overtime pay, minimum and maximum hours of work per day, payroll records and more. Become familiar with these laws and follow them in your business practices.

One option CSIL employers should know about is the flex schedule. You can negotiate a flexible schedule with your assistants where they work a certain number of hours per week, but the hours worked in one day are over the usual maximum allowed by Employment Standards. For example, a standard 40-hour work week is divided into five eight-hour days. With a flex schedule, you could have an arrangement with an employee to work 40 hours over four days, with 10 hours each.

For more information visit the Employment Standards Branch BC

https://www2.gov.bc.ca/gov/content/employment-business/employment-standards-advice/employment-standards/forms-resources

24-hour assistance

People who require 24-hour personal assistance can hire live-in home support workers. For example, some CSIL employers need someone to assist them to the bathroom or to roll them over in the middle of the night.

Employment Standards creates the rules for live-in home support workers, such as required minimum wages, hours of work and overtime, etc.

For more information visit the Employment Standards Branch BC

https://www2.gov.bc.ca/gov/content/employment-business/employment-standards-advice/employment-standards

There are two ways to employ live-in workers: full-time and part-time. A full-time live-in home support worker lives with you and works five days a week, with 32 consecutive hours free from work each week. A part-time live-in home support worker stays overnight in your home, usually for two or three days in a row, but they still have their own home. CSIL employers who use part-time workers usually have a schedule of three consecutive days for one worker, then another worker and so on.

Domestic live-in program

Some employers are beginning to use the Domestic Live-in Program offered through Human Resources and Social Development Canada. Assistants working under this program can work only for one employer. Employers can apply to have a person from another country come to Canada for a two-year contract. It's a win-win situation for an employer who has the stability of a guaranteed 2-year employee and for employees who want the opportunity to move to Canada.

For more information visit the Domestic Workers and Live-In Caregiver Program web site

http://www.labour.gov.bc.ca/esb/domestics/

Domestics – Fact Sheet

http://www.labour.gov.bc.ca/esb/facshts/pdfs/domestics.pdf

Questions regarding the Live-In Caregiver Program should be addressed to the federal government. The Employment Standards Branch is not involved with the application and processing of requests for live-in caregivers.

http://www.cic.gc.ca/english/work/caregiver/index.asp

Live-in plan

You will also need to create a plan for how live-in staff will fit into your household. For example, would you like to create guidelines on live-in assistants' visitors in your home? Or, use of your TV or CD player?

Please see the box below for some issues that CSIL employers have included in their live-in plans. Fill in your "rules" on these issues and include others you would like to include in your plan.

Live-in Plan

Accommodation	
Where will person sleep	
Charge room and board	
Common spaces	
Employee visitors in home	
Neatness	
Rules about pets	
Meals together or not	
Use of TV/CD player	
Behaviours	
Privacy for employer/employee	
Degree of companionship	

Family members as staff

Ministry of Health Policy

Family members may be paid to provide services for a CSIL client. However, the family member must follow all policies and procedures that apply to CSIL services and cannot be your representative or a member of your Client Support Group.

Here is an overview of the current policy. You can hire any family member, except an immediate family member (parent, child or spouse), without permission from the health authority. An employer can hire an immediate family member, if certain criteria are met and an exception is approved by the health authority. You will need to look for experienced assistants first, before approaching the health authority about hiring an immediate family member.

If you would like to apply for an exception, tell your health authority and ask for the appropriate application form. You may be approved if the following four criteria are met:

1. You or your representative want to pay an immediate family member to provide services that the health authority would otherwise provide either through CSIL or a family care home.
2. The health authority has determined there is no appropriate and available caregiver to provide for your needs for one or more of the following reasons:
    - nature and degree of services required
    - rural or remote location
    - cultural barriers
    - communication barriers.
3. Family circumstances have been considered and the risks (regarding conflict of interest and quality of care) are considered manageable.
4. Your services plan includes appropriate respite for the immediate family member.

Contact your case manager for more information and for a copy of the family exception form. If approved, the health authority will review the exception at least annually to see if you continue to have no other caregiver options and that your needs are being met.

See Ministry of Health “Payment to Family Members” Policy
https://www.health.gov.bc.ca/library/publications/year/2011/PFM_policy_guidelines.pdf

Hiring Family Members

There are pros and cons to having a family member act as your assistant. You should consider these factors before deciding who will assist with your home support services.

Some of the cons are a potential risk for conflicts of interest. For example, a family member may take more control than you would like over health decisions or finances. Hiring family members may change the nature of your relationship. If you're a young adult, having a parent as a service provicer could also make it harder for you to become independent.

Some of the pros are that you know each other and have a relationship. Your family member will understand a lot about you, your needs, your likes and dislikes–all things you won't have to train someone to understand.

Decide on your training period

Employees will need training to help them understand your particular methods and preferences. The majority of employers provide two days to one week of training. These days allow you to see whether or not the person can physically do the job and is compatible with you.

Tell your job applicants that there will be a training period and that you will make the final decision about hiring them after the training. You must pay the person for training days, whether you hire them or not.

Training is discussed in detail in Chapter 5.

What length of training would you like for your assistants?

Now you're ready to advertise

As we've gone through this chapter, you've learned everything you need to describe the job to prospective employees. You have:

- ✔ Looked at your own readiness to have an assistant
- ✔ Identified what you're looking for in an assistant
- ✔ Created a job description, Employee Guidelines and an Employment Contract
- ✔ Chosen your schedule and shifts
- ✔ Decided on whether to hire shift or live-in assistants
- ✔ Decided on a training period.

Chapter summary

This chapter describes the main planning areas you need to cover before you advertise for staff.

First, you need to spend time thinking about what you're looking for, and what your needs and personal preferences are. CSIL gives you the freedom to fit services to your needs, so give this some thought before you begin looking for staff.

Design a job description: a how-to guide for your staff on exactly what the job involves. The Supported Lifestyle Plan you created in Module 2 is a good start for writing your job description. Another great tool for you and your staff is a set of Employee Guidelines that clearly state your expectations of staff beyond the job description. Take time to create Employee Guidelines that cover what is important to you from being on time, to not smoking in your house, to respectful communication, etc.

The Employment Contract brings all of your staff rights and responsibilities "under one roof." The Contract will tell staff when they are paid, the probationary period, when evaluations occur and any other requirements you have. Both you and the employee sign the Contract and you keep it in the person's file.

Before hiring staff, you'll need a basic idea of how to schedule shifts and the type of staff to look for (part-time or live-in). Your Supported Lifestyle Plan will give you a good idea of what your staff shifts will be–at least enough of an idea to advertise for employees. Scheduling is discussed in more detail in Chapter 5 of this Module.

Part-time or live-in staff, or hiring immediate family members (parent, child, spouse) as staff, are options you can consider when hiring. There are pros and cons to each, as well as legal requirements to follow. Employment Standards Branch and your case manager can provide information to help you decide on your best option.

The final piece of information for your hiring process is the length of your training period. Most CSIL employers have a training period of two days to one week and hiring an employee depends on a positive training period.

Chapter review

What are some of the most important qualifications you will look for in an employee?	
Job Experience	Skills and Qualities
List six key topics you will cover in your Employee Guidelines.	
1.	4.
2.	5.
3.	6.

List four topics your Employment Contract should include.
1.
2.
3.
4.

What are the steps involved in designing your staff schedules?

If you hire live-in staff, what are the legal requirements you must meet?
If you hire part-time or full-time live in assistants, what are some things you would do to make the living environment positive for everyone?
What are some of the pros and cons at hiring immediate family members as assistants?
Pros
Cons

Next steps

1. Take a breather!
2. Gather the resources you put together in the Now You're Ready to Advertise section.
3. Start reading Chapter 4 to understand the steps of creating advertisements for your staff, reviewing applicants, interviewing and hiring.

Chapter 4 | Hiring Staff

Chapter objectives

In Chapter 4, we will help you develop the information you need to advertise for, interview and hire staff.

What you will learn

- The information to include in your ads.
- How and where to advertise for assistants.
- Ways to select people to interview.
- Conducting pre-interviews by phone and in-person interviews.
- Choosing the best employees and offering them the job.

What other people have said

"I wish I had known how to recruit appropriate assistants, and the right kinds of questions to ask."

"The best way to find assistants is by word-of-mouth. I personally don't like advertising in the newspaper; it's a lot of work to find the right fit."

"I make a point of doing the first interview with staff at my office. This way they see me in a work environment where I'm clearly in charge. They get the message that, if they get the job, they will be working for me, not looking after me."

Preparing and placing your advertisement

Hiring staff is often a time-consuming process, but it's one that deserves your careful attention. Good staff will make your life run much more smoothly and allow you to put your energy into what you value in life. We hope this Chapter will help you to make good decisions and hire great staff.

You did a lot of preparation in Chapter 3 and now have what you need to advertise for staff. These days, there are many low or no-cost places to advertise. For example, Craigslist ads are free so your ad can be as long as you like. If you choose to advertise in a major newspaper, however, short ads will be more affordable.

Ad content will vary according to your situation or personal style, but in general it should contain this information:

- ✔ A description of the job and experience and/or qualifications you are looking for
- ✔ When the job begins
- ✔ The days or hours of work per week
- ✔ The general location where you live, e.g., Surrey, Abbotsford
- ✔ A request for resumes
- ✔ Your contact information
- ✔ If you have space in the ad, tell people something about yourself to reveal some of your personality.
- ✔ Anything else that's important about the job

For the sake of safety, do not include your home address or any other information that could identify you or where you live.

Examples of Short Ads

Man with a disability, living in Kitsilano, requires an experienced home support assistant, part-time on weekends. Training will be provided. Should live nearby and have a driver's license. Please email your resume to josh444@gmail.com.

Female with a disability, living in Vancouver, requires a female home support assistant weekdays. Experience preferred, knowledge of ventilation care and cooking experience required. Email resume to jennifer@gmail.com

Write two short ads for your assistant.

Places you can post these ads

Example of a long (free) ad

I'm a 25-year-old man with Cerebral Palsy, living in Kitsilano, looking for a home support assistant.

I need someone to work part-time on weekends. The job involves assistance transferring and bladder/bowel routines. I prefer someone with experience in personal care, but I can provide training to someone who's willing to learn.

I pay $18 hour, and I'm a fair, respectful employer. I'm looking for someone who's flexible and reliable. You should also live fairly close to the Kits area so getting to work on time won't generally be a problem. And, I am a non-smoker.

Please email your resume and availability to me at bob@gmail.com. I usually receive many applications for positions, so cannot respond to everyone who applies. I will get in touch with you if I would like to arrange a time for a phone pre-interview. Thank you.

Write a longer ad for your assistant.

Have you included? • Job description • Experience needed • Start date • Work hours/days • Location • Request for resume • Training information • How to contact you • Other key details	

Places you can post this ad:

Maintaining your privacy

Occasionally, people who respond to your ads could be a bother to you, by repeatedly calling or emailing you. You may want to consider setting up a separate email address for your CSIL emails. You can also arrange a number block with your telephone service provider, so anyone you call cannot see your phone number in their call display.

Other Ways to Find Assistants

Running an ad is not the only way to find assistants. Here are some suggestions:

- ✔ **Other CSIL employers**
  Talk to other CSIL employers and tell them you are looking for assistants. Ask if they have any staff who would like more hours of work and if they have any objections to you contacting their staff. Do not "poach" staff. For example, if you know "Jane" has one primary assistant that she works well with, do not offer that person a job. However, it may work well for you and Jane, to hire one of her back up staff. Likewise, when you are interviewing potential staff, keep in mind that someone who might not work out for you might be appropriate for another CSIL employer.

- ✔ **Support Worker Central**
  The Family Support Institute's Support Worker Central website is a valuable source of information for both employers seeking assistants and assistants looking for work. The site also has employer resources in areas such as payroll and Canada Revenue Agency requirements.

http://www.supportworkercentral.com

✔ **BC Care Aide and Community Health Assistant Registry**
If you need staff with specific training, this provincial registry is a database of registered care aides and community health assistants who are looking for employment.

http://www.cachwr.bc.ca/

✔ **Word of mouth is often an excellent way of finding people.**
Spread the word that you're looking for staff and ask friends to be on the look out for people who may be good assistants. You may discover that there are people who weren't considering work in this field, but now want to try it.

✔ **Other places to post ads:**

- nursing school programs
- colleges and universities
- the building where you live
- church committees
- public libraries
- public shops in your neighbourhood, such as laundromats or cafes.

How is the response?

You want to have a good number of resumes to consider and compare. The more resumes you have, the more choice you have in hiring.

If you receive very few responses or responses that do fit your needs:

- ask yourself if the ad is missing any information
- ask a friend, one of your assistants or a colleague to read it and get their impressions of any problems
- consider if your wages are too low. If they are, consider whether it's possible to increase wages or offer other non-financial incentives, such as allowing staff to use your computer or internet access.
- consider other places to post your ad.

Make any needed adjustments to your ad. Post it again or post it in other places.

Reviewing responses

When you have enough responses, we recommend the following process to review resumes, so you know which applicants to choose for interviews.

Start by going through the ideas and materials you created in Chapter 3; for example the Know What You Are Looking For and Create a Job Description sections. **Remember the priorities you identified and read the resumes with these in mind.**

How to screen a resume

Screening a resume is a fast and effective way to remove the unsuitable applicants from your interview list. If you have a large number of resumes to review, this step will save you a lot of time and energy.

Review each resume carefully. Try to get a feel and understanding for the person's experience and abilities. Divide the resumes into three categories:

- Potential: to contact for phone interview
- Review again: needs further consideration
- Not suitable: not to be considered for the job, but to be kept on file for future reference

Use the guidelines below to help you categorize the resumes.

Cover letter

Did the person include a cover letter that helps you understand why they might be seeking the type of position that you are offering?

How are their language skills? Are there mistakes in the letter? Consider if problems in these areas affect tasks in the job description.

Related experience

Does the person have experience related to the job? Are you looking for someone with assistant experience or are you willing to train someone with no previous experience if they have other qualities and skills?

Changing jobs

Does the person change jobs often and/or stay in jobs for short periods and then move on? A history of short-term jobs may well predict how long the person will stay with you. Hiring and training is a time-consuming and costly process.

Gaps in employment history

Some people's resumes may have time periods when no employment information is given. A well-written resume should account for these gaps. For example, the resume could say that the person had attended school or volunteered for an organization (often to help improve their level of experience). Be suspicious of gaps in an employment history that are not reasonably explained.

Choosing who to interview

When you've finished screening the resumes, if there are enough in your "Potential" category, then file the resumes in the "To Review Again" category. These can be filed with the "Not Suitable" resumes.

However, if there are few or no "Potential" resumes, re-read the "To Review Again" resumes. Read them carefully and decide whether they could possibly move to the "Potential" group for a phone interview. If you just don't have enough strong resumes, you may need to advertise again.

Create a file to keep all the resumes you receive to show that you conducted the process fairly. These records will also be helpful the next time you advertise for staff.

Doing a pre-interview by phone

Regardless of how many candidates you have, it will save you a great deal of time and energy to do pre-interviews by phone. These interviews can be fairly short, but will provide you with enough information to narrow down your applicants for in-person interviews.

Overall, you want to be upbeat, provide factual information about the job and make working for you an appealing opportunity.

Trust your instincts. If you have a strong positive or negative impression of a candidate, listen to yourself.

We recommend designing a form for each pre-interview to record the results of your calls. For example, keep track of:

- the person's name and phone number
- the date of phone interview
- answers to your questions developed in the four areas discussed below
- whether or not you want to interview them in person
- general impressions
- other comments.

We suggest a phone interview that touches on four areas: the job description, the applicant's experience, questions to gather personal information and specific requirements.

1. **The job description**
Summarize the job, but give enough detail that the tasks are understood. If the person has assistant experience, you may not need to provide specifics. But, if they have not had experience, be specific about what's involved in your personal supports, such as bladder or bowel care. If they are still interested in the position, then continue with your questions. Do not leave this information until the in-person interview or you may waste everyone's time.

   Be sure to include:

   - your specific health needs
   - the main personal care tasks you need done
   - hours per day and/or time of shifts
   - salary.

2. **The applicant's experience**
Ask the person if they have assistant experience and, if so, which specific personal tasks they have experience doing. Ask questions that are most important to you about the person's experience. If they do not have experience, ask if they are comfortable with the tasks you have described. Are they willing to learn?

3. **Questions to gather personal information**
Some personal connection with your assistant is important. Think of a few questions that will draw out personal information to help you form a picture of their personality. For example, do you want to know if they enjoy children because you have children in the house? Do you want to ask about their hobbies and interests?

3. **Specific requirements.**
In the phone interview, ask about things that are a must for you, rather than waiting for the in-person interview. For example, must the person be a non-smoker? Be physically strong? Live near you?

Use the form below to put together your phone interview questionsand topics.

Phone Interview Form

Name	Phone Number
Date of Interview	Interview in person? ❑ Yes ❑ No ❑ Maybe
Describe the job, main duties, scheduling and wages.	
What do you want to ask about their work experience?	
What personal questions do you want to ask them?	
Do you have specific requirements you want to mention or ask about?	

General impressions or other comments

At the end of the call, thank the person for their time. Explain that you will call if you'd like to set up an interview once you've talked to everyone on your list. However, if you feel sure that you want to interview the person, you can end by setting up a time for the in-person interview.

Fill in any last details of the call in your Phone Interview Form.

When conducting your phone or in-person interviews, always have your questions or interview tool in front of you–and stick to it. Do your best to treat everyone the same. Gather the same information and impressions for each candidate to ensure a fair comparison of each person's answers and attitudes.

Phone interview tracking form

If you do more than a handful of phone interviews, consider using a simple form to see all your applicants or candidates on one sheet. This form could record basic information, including whether or not to interview them in person:

Date	Name	Phone	General Impressions	To Interview?
Jan. 12	Jason Yee	555-555-5555	Experienced, but poor social skills, didn't listen well	No
Jan. 14	Sandra Pete	222-222-2222	Inexperienced, but seems willing to learn, asked good questions	Maybe
Jan. 14	Paul Smith	444-444-4444	Worked for another CSIL client, skilled and easy going	Yes

Ask the job applicants to bring a list of employment references to the in-person interview.

How to Conduct an In-person Interview

If you conduct an in-person interview well, you and the potential employee will learn a great deal about each other. An interview is successful when you:

- ✔ **Have clearly communicated your expectations and values.**
  With your job description in hand, you'll make sure the employee knows what's involved in the job. You'll also describe some of your personal style and values so they have an idea of the kind of employer you will be
- ✔ **Gather information on the applicant's skills and experience.**
  With clear questions prepared beforehand, you'll know what to ask about the applicants' previous experience.
- ✔ **Gain a sense of the applicant's personality.**
  To do this, the person will need to be at ease. Do your best to create a relaxed and respectful atmosphere.

Having a friend present for CSIL employee interviews can be extremely helpful. They can take notes for you, share impressions after the interview and provide a safety precaution so you aren't interviewing alone.

Preparing for the interview

Use the information you prepared earlier in this Workbook to prepare for the interview, including:

- ✔ What you are looking for in employees
- ✔ A job description
- ✔ Employee Guidelines.

We also recommend creating and using a simple Application Form. You'll use the form to gather and keep information on all the people you interview in person. The forms will also be a useful record if you advertise for assistants in the future, need to know people's shift preferences or to see if someone agreed to be on a back-up assistant list.

Choose a day, time and place for the interviews that will give you the most privacy. Avoid days and times when you are normally busy with your staff or other activities. Choose a room that is private, preferably one with a door.

Be Safe

If you're interviewing people you don't know, and don't have a trusted person with you, we don't recommend interviewing in your home. Arrange to meet applicants at a cafe or book a room in a community centre. If you do meet in a public place, invite a few applicants to come at the same time. Explain the job to everyone at once, hand out application forms and meet in a more relaxed, informal atmosphere.

Here is a sample Application Form you can use or adapt to your needs.

Employment appication Form Date__________________
Name:
Address: ____ ____ Home phone #: ___________________ Other phone #: __________________________
Do you have any dependants?
Are you legally entitled to work in Canada? ❑ Yes ❑ No
Please check the appropriate category: ❑ Canadian citizen ❑ Permanent resident ❑ Other If other, specify: ______________________
How did you hear about this position: ____
Briefly tell us why you applied for this position and what skills you would bring to it: ____ ____ ____ ____ ____
Do you have a valid driver's license? ❑ Yes ❑ No
Are you physically able to transfer various weights? ❑ Yes ❑ No
Are you willing to work full days from early morning to late evening? ❑ Yes ❑ No
Are you willing to stay 24 hours, 1-3 days/week in someone's home? ❑ Yes ❑ No
Are you willing to work night shifts? ❑ Yes ❑ No

Employment application Form Date__________________

Please fill in the days and times you are available to work.

MON	TUES	WED	THURS	FRI	SAT	SUN
From: _______ to: _______	From: _______ to: _______	From: _______ to: _______	From: _______ to: _______	From: _______ to: _______	From: _______ to: _______	From: _______ to: _______

Education: (prior to job offer, proof of education may be required)

	Name/Location	Course	Diploma	Date Complete
High School				
Other Education or Training				

Other Skills:

❏ CPR
❏ First Aid
❏ Ventilator Care
❏ Bowel/Bladder Care
❏ Transfers to and from bed
❏ Tube Feeding
❏ Theraputic Exercises
❏ Suctioning
❏ Showering/Bathing
❏ Dressing
❏ Housekeeping
❏ Laundry
❏ Shopping
❏ Banking/Budgets

Other________________________________

Under the Human Rights Code of BC, you cannot discriminate against potential employees based on race, gender, sexual orientation, religion or disability. You are only entitled to ask questions that relate directly to a person's ability to do the job.

Information you'll provide

- ✔ **Begin with the job description.**
  If you haven't already done so in your phone interview, begin the in-person interview by explaining the job position in detail and the pay offered. If the person is no longer interested in the position, this may mean you didn't explain the position well enough in the pre-interview by phone. Make a note for next time!

- ✔ **Mention other job requirements.**
  It's good business practice to communicate any requirements you have before you hire. For example, let the person know the length of your training period and if hiring is dependent on it. Also, let the person know the length of your probation period and that their performance will also be evaluated at the end of this period. If you will require a criminal record check or medical record check as part of employment, let the person know at the interview. See more on these checks later in this Chapter.

Information you'll gather

Spend some time developing questions that are meaningful to you and will reflect your daily routines, values and style. Create a method to rate and organize applicants' responses during the interview.

Here is an excellent question format developed by a CSIL employer.

Question	Write your question here.
Ideal answer	Write in an example of an "ideal response" from the employee. What would you see as a great answer to your question?
Rate answer	Rate the person's answers on a scale from 1 to 5
Comments	Use this space to make any other notes about the person's answer.

Sample Question

Question	What is your understanding of the position that you are applying for? Is there anything else you need to know?
Ideal answer	By the end of the discussion, the candidate should have a good knowledge of what the position entails. You will have reviewed the job description.
Rate answer	0 1 2 3 4 5
Comments	She's worked with someone with similar needs and I think she understands the tasks well.

Here are some sample questions to consider. Tick the check box beside the questions you'd like to include in your interview.

- ❏ Why would you be suitable for this job? What skills do you bring to the job?
- ❏ Tell me about a good employer you have had. What worked for you?
- ❏ If you were working in this position and something was bothering you about the working environment, what would you do about it?
- ❏ If you do overnight shifts for me, will you be able to wake up to do something for me and then get back to sleep?
- ❏ If there anything that would limit your ability to do everything in the job description?
- ❏ What level of training and experience do you have providing intimate personal care including providing peri-care, showering, changing sanitary pads, and Attends?
- ❏ What is your understanding of personal confidentiality?
- ❏ What do you look for in an employer?
- ❏ If you are hired, how long are you willing to commit to this job?
- ❏ Are you a flexible person?
- ❏ What are your hobbies and interests? This is a personal question, but it will help me to know a bit about you and see if we have common interests.
- ❏ What days and times are you available? Are you willing to work split shifts?
- ❏ Are you willing to accompany me on outings?
- ❏ I'm not a "morning person," so I'm a little grumpy when I get up! Are you able to handle a less-than-perfect mood from time to time and not take it personally?
- ❏ Would you feel comfortable driving me in my minivan?
- ❏ Have you had any driving infractions?
- ❏ Would you be willing to join my on-call backup list?
- ❏ Can I pass on your name and phone number to other people on CSIL?
- ❏ When are you available to start working?
- ❏ Do you have any final questions before we end this interview?

Questions you can't ask

Human rights legislation restricts the kinds of questions you can ask applicants. You are allowed to ask questions that relate directly to the person's ability to do the tasks involved in the job. For example, you can ask if the person is able to lift various weights easily, if you need daily transfers. You are not allowed to ask:

- ✖ an applicant's age
- ✖ an applicant's religious faith
- ✖ if the applicant is pregnant or planning a pregnancy.

BC Human Rights Tribunal, Human Rights Code page.
http://www.bchrt.bc.ca/human-rights-duties/employment/index.htm

Tips

- ✔ Ask open-ended questions that require more than "Yes" or "No" answers.
- ✔ Once you have a set of questions, ask every candidate the same questions. It will be easier to compare applicants fairly, if you consistently ask each person the same questions in the same way.
- ✔ Try to behave the same way toward each applicant. If you are warm and friendly to one and cool and detached to another, you will get different responses and may therefore be "judging" people unfairly.
- ✔ Value your time and the applicant's time. Don't let the conversation go too much off topic, unless you're gathering valuable information about the applicant.
- ✔ If you live with a spouse or significant other, consider asking them to be part of the in-person interviews. They may want to meet or help choose your assistants.
- ✔ If you're conducting more than one interview in a row, make sure that you allow extra time between interviews. You do not want to feel rushed.

The in-person interview

Now, you're ready to interview. The in-person interview is designed to provide or gather more information in the same four key areas as the phone interview:

1. the job description and requirements
2. the applicant's experience
3. personal impressions of the applicant
4. confirming any "musts" that you have regarding the position.

Application form and job description

Ask the applicant to complete the application form before you begin the interview. Also, have copies of the job description available to hand out.

Set the tone

- ❑ It's common for people to be a bit nervous during an interview. You might even have a few butterflies yourself! Do your best to help the person be at ease–offer them a cup of tea, make a bit of "small talk" before you begin or simply thank them for coming. If people are more comfortable, the process will be more pleasant and you'll learn more from it.
- ❑ Let the person know that you welcome questions during the interview. Encourage the person to participate in the interview, rather than simply responding. The interview will stay on track, but you may learn more if you allow people some leeway during the interview
- ❑ Mention that most questions will be directly related to the job, but some will be personal. Explain that these questions allow you to explore how your personalities or interests may connect. Let the person know why you're asking these kinds of questions.

Go through your interview questions

- ❑ Have your interview questions ready and review them. If you have a friend with you, ask them to record the answers for you so you can focus on the applicant.

See beyond the questions

There are many ways you can gain impressions of people beyond the questions you ask:

- ❏ Observe how the person interacts with you. Are they at ease or are they self-conscious? Do they make eye contact with you? Are they easy to interact with?
- ❏ How do they communicate? Do they interrupt you when you're talking? Do they ask pertinent questions? Do they listen to what you are saying?

Finish the interview

- ❏ Before the person leaves, go over their Application Form to see if you have any questions or there is information missing.
- ❏ End the interview and thank the applicant for taking the time to come. Let them know when you will be making a decision and that they will be contacted if they are a successful applicant.
- ❏ After the person leaves, complete your interview notes and rating.
- ❏ If you have a friend with you, take a few minutes to discuss your impressions of the applicant.

How to decide?

When you're done with interviews:

1. Organize your Application Forms, resumes and interview questionnaires.
2. Review your questionnaires and add any final notes.
3. Create three piles of applicants: Yes, No and Maybe.

There are many factors that will affect your decision about who is a suitable assistant. It's a very individual choice. Here are some criteria that CSIL employers find helpful. Check off those that are most important for you.

- ❏ Prior experience
- ❏ Personality and overall "impression"
- ❏ Willingness to learn new skills
- ❏ References
- ❏ Availability
- ❏ Reason(s) for wanting the job

Checking references

Once you have completed an interview, if you want to consider the person for a position, the candidate should provide you with at least three "work" references: someone who is supervising, or has supervised, that person's work.

You must have the candidate's consent before you contact the references they provide to you.

Here is a sample reference check form. The top section is filled in by the job candidate and gives you permission to contact their reference. In BC, verbal permission is enough, but written permission is a good idea. The bottom section covers the questions you will ask each reference.

Reference Check Form

Candidate's Information and Consent	
I hereby authorize the release of the following information:	X Signature of Applicant
Name of Applicant:	Date:
Name of Reference and Title:	
Company Name:	Phone:
Interview Questions	
Name of Interviewer:	Date of Interview:
Was the applicant employed by your company?	
Employment dates:	
Nature of applicant's job (duties performed):	
What were their strengths?	
What was the applicant's overall attitude toward this position and his/her responsibilities in general?	
Why did the applicant leave your employment?	

Reference Check Form
The applicant has applied for a position where they will be required to help me with the activities of daily living involving personal care, physical recreation, vocational, educational and environmental needs. The applicant will be required to perform all the duties in a safe and respectful manner. Do you think the applicant has the skills and abilities to perform this job? ❑ Yes ❑ No Please explain:
Additional Comments:
X Signature of Interviewer

Complete this reference check process for each reference.

Don’t skip calling the other references, regardless of the results and information (good or bad) you gather after each call.

Keeping records

We recommend keeping a record of all the people you have interviewed, either by phone or in person. If and when you need to hire more assistants, you want to know if you have interviewed or hired applicants before. Positive and negative comments should be recorded so you know if you want to interview someone again or if they were a definite “Yes” or “No.”

Offering the job

Based on candidates' resumes, application forms and reference checks, you will probably have one or more people you would like to hire.

- Notify them by phone or email and confirm they are still interested in the job
- If they would like the job, let them know the date the job starts and remind them of other requirements you have, such as the training and/or probationary period, criminal record check, medical record check and/or driving record check. Once you receive the positive results of these checks, the person is officially hired.

Criminal record check

As we mentioned earlier in this Chapter, we recommend that you request criminal record checks on employees and let them know this is part of your employment process. When you find people you would like to hire, offer them the job conditional on the results of a criminal record check. It usually takes less than a week for the results.

Here is the process:

- Create a Criminal Records Check package for employees.
- Give the package to your employee(s) and ask them to fill out the necessary forms and take the whole package to their local police station.

A sample criminal check package is included in the appendices.

The Criminal Record Review Act educational materials.

https://www2.gov.bc.ca/gov/content/safety/crime-prevention/criminal-record-check

National or local checks

Most employers request local record checks through the police station in their area. However, you can also request a national criminal record check through the RCMP. This is the most in-depth check, including a finger-print check of employees.

RCMP criminal checks.

http://www.rcmp-grc.gc.ca/cr-cj/fing-empr2-eng.htm

Vancouver police checks.

http://vancouver.ca/police/organization/records-checks-fingerprinting/police-records-check.html

Criminal record checks will usually not cover records from other countries, juvenile records or records that have been expunged (removed from the public record).

Medical record check

A Medical Record Check is strongly recommended if you need assistance with transferring or if you have a compromised immune system, especially if you use a ventilator. You also need to know if the potential employee is physically capable of doing the tasks in your job description.

The employee, however, also has a right to reasonable privacy about their medical information. We therefore recommend you provide your employees with a letter similar to the following, to take to their doctor.

Sample Medical Check Cover Letter

Dear Dr. McIntyre:

Lillian Wei has applied for a job as my home support assistant. She's aware that her employment is dependent on a physician's confirmation that she can physically manage the job. For example, the job involves: standing, bending, lifting in excess of 40 pounds, and assisting me with some personal hygiene tasks.

It is also essential that she is free of infectious diseases, that there are no pre-existing conditions or injuries that, to the best of your knowledge, would prevent her from performing all aspects of the job, and that she is emotionally capable to undertake the position.

I have attached a job description that details the tasks she must do for me regularly. I would like your opinion on whether or not she is capable of fulfilling the requirements of this position.

I thank you for your time and if you need any further details, please feel free to contact me.

Yours truly,

Jason Lee

Comments ____

____

____

____

____

______________________________ ______________________________

Physician's Signature Date

Driving record check

If you need your employee to drive your vehicle, check their driving record. Get a National Safety Code Abstract Personal Request Form from the Insurance Corporation of BC (ICBC). Ask your employee to fill in the form to request their driving record and to have results sent to you. You can also request a driving record from another province, if the applicant has recently moved to BC.

ICBC, Your Driving Record page. Download a Personal Request Form.
https://www.icbc.com/driver-licensing/getting-licensed/Pages/Your-driving-record.aspx

Oath of Confidentiality

Some employers also ask staff to sign a document saying they agree to keeping your information private. This can mean personal information they hear about you during their work with you, any business-related information or any information they learn about other staff, if you have hired the person to help with your record keeping.

You can see a sample Oath of Confidentiality in the appendices.

Finalizing the paperwork

If the person passes all of the checks, you're ready to finish the paperwork.

To complete the hiring process:

- ✔ Prepare an Employment Contract for the potential employee.
- ✔ Ask them to read and sign the Employment Contract.
- ✔ Create new paper files for the employee, including:
  - Employment Contract
  - TD1 information
  - Application form
  - Any other documentation you've gathered on the employee.

You will learn more about Required Record keeping in Chapter 5.

Chapter summary

Hiring begins with writing simple, informative ads and posting them in a variety of places. Post free ads, on Craigslist for example, or paid ads in newspapers, as well as finding staff through word-of-mouth and community organizations.

Before you begin in person-interviewing, ideally you want at least ten resumes to choose from. Once you do, screen your resumes to select the applicants that look best. There are certain things to look for in resumes that will tell you something about them, such as how often they change jobs or if there are long gaps where no job information is given.

We recommend pre-interviewing your chosen candidates by phone to select the most promising for an in-person interview. We have covered some suggested questions for the pre-interviews, as well as ways to record the results for later consideration.

For in-person interviews, develop a set of interview questions to ask each applicant. There are recommended areas to cover in the interview, such as a clear job description, your expectations, and the applicant's experience and availability for work.

In addition to the questions you ask, it's important to set a professional and friendly environment for interviews, so you can put people at ease. Leave space for the person to express their personality so you can learn something about them beyond their resume.

When you've finished your interviews, choose the applicants who you feel would make good employees and contact their references. Follow the process in this Chapter to gather the same information from each person's references. When you've made your final choice(s), offer the applicant(s) the job by phone or email and let them know of any final checks you require before finalizing employment, such as a medical check.

When an applicant accepts your offer of employment, ask them come in to sign an Employment Contract and fill in other forms, such as a TD1 for your files. Finish off your paperwork by creating an employee file for each new staff person.

Chapter review

Where will you post your advertisements for staff?
How will you know if you have enough responses to begin interviewing?
List four topics you will cover in your pre-interviews by phone.
1. 2. 3. 4.
Which forms will you use to help you organize your phone and in-person interviews?
Did you make a start on your in-person interview questions in this Chapter?
❏ Yes ❏ No

What will you do to create a positive and professional environment for the interview?
What will be the three most important qualities your staff must have? For example, assistant experience, flexibility, positive attitude?
1. 2. 3.
Are there other questions you would add to the Reference Check form in this Chapter?
❏ Yes ❏ No If yes, add them here
Why is it important to do criminal and medical checks?
How do you finalize the paperwork for the hiring process?

Next steps

1. Check that you've created files for each new employee and that all the needed documents are included from the Finalizing the Paperwork section of this Chapter.
2. Think back on the interviewing process: are there any issues you came across that you'd like to remember later? For example, did you realize there are specific tasks that you want to emphasize with staff, like being sure you're up and on the road by 9a.m.? Or, is there a particular staff person who you know will need some extra training? Make a few notes on anything that's important to follow up on in the orientation and training process.
3. Remember that, if you're new to having your own staff, you'll learn as you go along. Just keep an open mind, be willing to make a few mistakes and to communicate with staff and you'll do well.

Chapter 5 | Managing CSIL

Chapter objectives

In this Chapter, we explain how to create an organized, efficient and enjoyable work environment for both you and your employees.

What you will learn

- The benefits of good communication for virtually all aspects of managing your home support services.
- What assertive communication is and how to become good at it.
- How to develop a training program for staff and carry it out.
- Tips for scheduling and daily routines.
- Ways to create a positive environment for your employees.
- How to conduct performance evaluations.
- Ways to handle staff disputes and terminations.

What other people have said

“I’ve found there’s no such thing as a perfect assistant. It’s understandable since I’m not perfect either. I’ve learned to be clear on my priorities and to decide when it’s OK to compromise and when to make a firm stand. My staff relations have become much better since I learned how and when to compromise.”

“I want to be the driving force behind managing my care because I believe that I am the most qualified person.”

“Be really organized and well prepared for unforeseen circumstances (staff calling in sick, staff quitting, etc. Have a healthy back up of staff available.”

“Start off communicating clear boundaries with staff at the very beginning. What’s OK, what’s not. It’s really hard for people to ‘un-learn’ things. It’s much better to have clear expectations from the start.”

Communication is key

Good relationships are not possible without good communication, yet it's one of the most underdeveloped skills for many of us. Understanding some basics and putting them into practice, will make a huge difference in your relationship with your staff and in the work environment.

Good communication creates:

- ✔ respect, trust and mutual understanding
- ✔ clarity around what needs to be done and why
- ✔ a stronger relationship that has the ability to grow and adapt

Remember that, for most people, being a personal assistant may not be their ultimate career goal. The job can be challenging, have long hours or in some cases may not be highly paid. Good communication and treating employees with respect may encourage them to stay with you longer.

We mentioned earlier in this Module that CSIL bookkeeping is the number 1 challenge for employers. A close second is handling disputes with employees. **Prioritizing good communication will avoid disputes before they start and help you respond skillfully to them if they do occur.**

Communication Tips

- ✔ **Enjoy being an employer.**
  It's a satisfying feeling to be in control. Being a CSIL employer is a great opportunity to learn skills that are transferable to many job environments and life experiences.
- ✔ **Adjust to being the employer.**
  You may have learned to be somewhat passive as far as your services are concerned. You may be used to "being done to." Remember that you're now the employer and you have the right and responsibility to direct services in ways that suit you.
- ✔ **Have clear boundaries.**
  Having personal assistants in your home, sometimes for hours each day, can blur the lines between employee and friend. It's important for you to be clear with employees that the job and your needs come first. From here, you can build a warm, friendly relationship that is enjoyable for everyone, but has clear boundaries.
- ✔ **Don't let problems grow.**
  Problems that start out as a small and seemingly insignificant annoyance can snowball into a major conflict, if you don't address it. Establish and encourage an environment of openness so that, when things come up that may trouble you or your staff, they can be dealt with before they get out of hand.
- ✔ **Learn how to communicate assertively, rather than passively or aggressively.**
  In the section below Assertive, Aggressive or Passive, we explain the important differences between these communication styles.

✔ **Be positive and encouraging.**
It's human nature to respond to positive feedback. Be an employer that offers praise for a job well done.

✔ **Don't make it personal.**
If there are problems you would like to talk about, focus on the behaviour or task, not the person.

✔ **Clarify any language issues.**
English may not be your assistant's first language. If you're most comfortable communicating in English, learn ways to ensure that you're understood and that you're also understanding your staff. Help them to be comfortable asking questions and to admit when they don't understand you. This applies regardless of your language.

✔ **Treat assistants with respect.**
Don't comment on one staff member in front of another. Respect your employees' privacy and confidentiality, just as you want them to do with you.

Signs of Poor Communication

✖ Feeling that you are not being heard

✖ Having to repeat yourself

✖ Not being clearly understood

✖ Feeling unsatisfied with communication

✖ Feeling frustrated

✖ An inability to paraphrase back what has been said

Assertive, Aggressive or Passive

Remember that "the medium is the message." This means that what you say is often not as important as how you say it. We have all been in situations where someone's words were meant to convey one thing, but we "heard" something very different through their tone of voice or body language.

The clearest style of communication is assertive communication. Most of us have had little training in this kind of communication, but if you develop even a few assertive communication skills, the positive effects will extend from your relationship with your employees into all corners of your life.

Here's a quick look at communication styles.

✖ **Passive**	✖ **Aggressive**	✔ Assertive
Failing to honestly express thoughts feelings and beliefs	Expressing your ideas and feelings in a way that ignores the rights and feelings of others	Expressing your ideas and feelings directly, while being able to take into account the other person's feelings or point of view
Expressing in a hesitant or apologetic way	Communicating through fighting, accusing and threatening	Taking responsibility for one's own behaviour
Unwilling to clearly express needs	Not listening to others' opinions or responses	Offering and being able to accept compromise
expecting people to "just understand what I need or how I feel" without saying it.		Not letting situations build up to a state of crisis
		Maintaining eye contact

The following chart lists some specific verbal and non-verbal signs of communication styles. As you read through this chart, check the characteristics that remind you of yourself.

Verbal and Non-verbal Behaviours			
	✖ **Passive**	✖ **Aggressive**	✔ **Assertive**
Verbal	❏ Apologetic words ❏ Hidden meanings ❏ Failure to come to the point ❏ Rambling ❏ At a loss for words ❏ Failure to say what you really mean ❏ Use "I mean" or "You know"	❏ Loaded words ❏ Accusations ❏ Statements are based on own feelings/ideas only ❏ Dominating, superior words ❏ "You" messages that blame or label	❏ Statement of wants ❏ Honest statement of feelings ❏ Statements are based on observable behaviours and events ❏ Direct statements which say what you mean
Non-Verbal General	❏ Actions instead of words, hoping someone will guess what you want ❏ Looking as if you don't mean what you say	❏ Exaggerated show of strength ❏ Sarcastic style ❏ Air of superiority	❏ Attentive listening behaviour ❏ General assured manner ❏ Communicating caring and strength
Specific Voice	❏ Weak, hesitant, soft, sometimes wavering	❏ Tense, shrill, loud, cold, "deadly quiet," demanding, superior, bossy	❏ Firm, warm, relaxed
Eyes	❏ Looking away, downcast, teary, pleading	❏ Expressionless, narrowed, cold, staring, not really "seeing" you	❏ Open, frank, direct, eye contact, but not staring.
Posture	❏ Lean for support, stooped, a lot of head nodding	❏ Hands on hips, feet apart, stiff and rigid, rude, dominating	❏ Well-balanced, straight-on, erect, relaxed
Hands	❏ Fidgety, clammy	❏ Clenched, abrupt gestures, finger-pointing, fist-pounding	❏ Relaxed
Totals	___ **Passive**	___ **Aggressive**	___ **Assertive**

Your Communication Style
Adding up the check boxes in the previous chart, what is your dominant communication style? ❏ Passive ❏ Aggresive ❏ Assertive
Which of your current behaviours do you think work well?
What are some assertive behaviours that you can practice?

Becoming a skillful communicator is a life-long task. Make a commitment to improve how you communicate. Take an adult education course. Find opportunities in day-to-day activities to practice, so the ability to communicate well will be there when you need it in more challenging situations.

Training Your Assistants

Whether or not your assistant is experienced, you'll need to train them to fulfill the job description in the way that you want tasks to be done.

The training period will also allow you to find out whether or not the new employee can physically do the job and if they are compatible with you.

At the end of the training period, meet with the prospective employee and discuss your views on how it went. Then, make a decision about whether or not to continue the person's employment.

If training is new to you, you don't need to be perfect! Be open about it. Tell your assistant you're on a learning curve too.

Put safety first

Never ask employees to perform a task that puts their safety or health at risk.

In particular, maintaining assistant safety around transfers is crucial. WorkSafeBC has guidelines around safe transfers and other care tasks that you need to understand and follow to ensure that your employees do not injure themselves. If you use a lift, ensure that your employees use proper body mechanics at all times.

WorkSafeBC, Injury Prevention Resources for Health Care-Home Care page.
https://www.worksafebc.com/en/health-safety/industries/health-care-social-services

Training resources

- ✔ Depending on where you live, there may be assistant training courses available through community organizations. For example, the Provincial Respiratory Outreach Program (PROP) (https://www.technologyforliving.org/provincial-respiratory-outreach-program-prop/) offers free training courses for people using ventilators and their caregivers or assistants.
- ✔ Your health authority may provide training consultation on complex tasks. Ask your case manager about consultations available to you, if you feel this would help you with training assistants.

Training suggestions

- ✔ If you already have a trained assistant, you may want them to assist with training of new staff. If so, be sure to include this task in their job description. This is often a good way to train new staff, but you may also want to "train your trainer." You want to be sure your experienced staff pass on information in the way you want. This can also be a good way to do refresher training with your current staff. Your "trainer" must be paid their usual wage, but you may have a training wage for your new employee that is at least the minimum wage.

- ✔ You can ask your new assistant to observe your routines for two or three days to learn how things are done and ask questions. Then, on the next day, the new assistant can perform tasks, overseen by your trained assistant. You will need to pay both assistants for these training days, so remember to budget for this.
- ✔ Design your own Orientation Checklist using the form below in Training Steps.
- ✔ Be clear about your priorities and your style from the beginning–not only in what you say, but in what you do. Explain how you want things done, but be open to ideas too.
- ✔ Have realistic expectations. Give people time to learn.
- ✔ Clearly and respectfully explain what you need for each task. Go through your task list step by step for each task or routine.
- ✔ If you are training assistants in transfers, show them how to transfer safely, using proper body mechanics.

Training steps

Orientation

We recommend you use an Orientation Checklist to familiarize your assistants with all aspects of the job and the work space–your home. Explain each topic in your checklist and note the date the orientation was done. When the training is complete, both you and your employee sign the form.

Here is a sample form you can use or adapt to your needs. We recommend you cover all of the areas below that are relevant to your services in your staff orientation.

Orientation Checklist		
Introduction	Date Completed	Initials
Job Description		
Standards of employee conduct		
Abuse Language Expectations regarding appearance and dress Harassment statement Smoking Guideline regarding visitors or friends Policy regarding staff using own vehicle Policy regarding staff using employers vehicle Expectation regarding professional conduct Confidentiality		

Orientation Checklist		
Health care		
Universal health precautions Personal supports plan Bowel care Catheter care Menses care Bath and showering preferences Feeding support Medication administration Transferring / wheelchair lifts		
Household		
Assisting with meals Review of tasks Shift expectations Answering phones		
Emergency Information		
Emergency procedure and contacts Location of fire extinguisher First aid kit First aid log Evacuation procedures Smoke detectors Earthquake kit and contents		
Staffing Information		
Pay schedule Petty cash/handling money Mileage Staff schedule Vacation pay Sick leave Bereavement leave Mail slots Communication systems House keys		
Signature of Employee		Date
Signature of Employer		Date

Be clear about your needs and quirks

In your orientation, you will of course pay particular attention to your personal needs, physical abilities and limitations.

- Explain how much mobility you have and exactly what kind of assistance you do and do not need.
- You may want to keep your staff informed about medications you take and any side effects they should be aware of. If there are any possible dangerous side effects or other conditions, for example skin breakdown, ensure that staff know what to watch for and what to do.
- Let your assistant know about any limitations you have that are not obvious, but are relevant to their job. For example, do you have memory lapses? Explain how you handle this or compensate for it, for example, by asking staff to leave important notes on the kitchen corkboard or writing down schedule changes on the calendar.
- Also mentioned any personal “imperfections.” For example, are you “not a morning person” and not in a great mood at this time of day? Let your staff know this about you, so they will know not to take your mood personally or wonder if there is something wrong with their job performance.

Training is an ongoing process. Your assistants will need refreshers from time to time on their job description and on how you want specific tasks done.

Be organized

- Whatever tools you decide to use for your daily routine, such as task sheets, be consistent in using them. Make it easy for your assistant to know what’s expected and when.
- Always have enough job-related supplies and products available.
- Keep your home organized, so you know where things are and can direct staff. Encourage staff to keep things this way.
- Consider colour coding or naming supplies or areas. Then, you can use these when explaining how to do a particular task. For example, “Cleaning supplies for my vent hoses are in the blue box in The Shed (which is the hall closet).”
- Develop a standard routine to get tasks done within the least amount of time and least disruption. For example, find ways to group tasks together, such as grouping a shower with tidying the bathroom.

Scheduling and rescheduling

When you first start on CSIL or when you hire new staff, it may take some time to develop a regular schedule. Find a weekly schedule that works well for you, makes the best use of your CSIL hours and fits with your assistants' skills. This can take some practise and familiarity with your staff's skills.

Take a few weeks to settle on a schedule that works well for everyone. Then, keep to that schedule for a few months if you can. Employees will appreciate a predictable schedule and so will you. You and your employees need to be flexible, of course, but in general you'll have a dependable schedule.

If you live with other people, consider them when you're planning your schedule or changing it. How will it affect their plans or their activities if your assistants are in your home?

Scheduling Do's and Don'ts

- Emphasize with staff that it's a requirement of the job to have excellent job attendance. They're required to work their shifts, unless they are ill or they give you prior notice.
- Explain that you're in charge of scheduling. Discourage your staff from finding replacements themselves. They should simply notify you instead.
- If you receive notice that an assistant will miss a shift, contact staff on your back-up list and offer them the shift.
- If you want to change the hours of a shift to go to an event, give staff as much notice as possible. If it is not an emergency, give your staff a minimum of 24 hours notice.

There are exceptions to most rules. If you have developed a good relationship with an assistant who you know is skilled and trustworthy, it may benefit you to involve them in the process of scheduling or rescheduling staff.

Below are two sample weekly schedules: one for a person with a regular schedule and another for someone with a more varied schedule.

<table>
<tr><th colspan="8">Weekly Schedule Sample | Person wih a regular weekly schedule (e.g., work or school)</th></tr>
<tr><th></th><th>SUN</th><th>MON</th><th>TUES</th><th>WED</th><th>THURS</th><th>FRI</th><th>SAT</th></tr>
<tr><td>7 AM</td><td></td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Alicia</td><td></td></tr>
<tr><td>8 AM</td><td></td><td></td></tr>
<tr><td>9 AM</td><td rowspan="2">Lillian</td><td></td><td></td><td></td><td></td><td></td><td rowspan="2">Lillian</td></tr>
<tr><td>10 AM</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>11 AM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>NOON</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>1 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>2 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td>4 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>5 PM</td><td></td><td rowspan="2">Alicia</td><td></td><td></td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td></td></tr>
<tr><td>6 PM</td><td></td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td></td></tr>
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<tr><td>8 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td>10 PM</td><td rowspan="2">Jason</td><td rowspan="2">Lillian</td></tr>
<tr><td>11 PM</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>MIDNIGHT</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

<table>
<tr><th colspan="8">Weekly Schedule Sample | Person wih a varied weekly schedule</th></tr>
<tr><th></th><th>SUN</th><th>MON</th><th>TUES</th><th>WED</th><th>THURS</th><th>FRI</th><th>SAT</th></tr>
<tr><td>7 AM</td><td rowspan="2">Lillian</td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Jason</td><td rowspan="2">Alicia</td><td rowspan="2">Lillian</td></tr>
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<tr><td>NOON</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td>2 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>3 PM</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td>5 PM</td><td></td><td></td><td rowspan="3">Alicia</td><td></td><td></td></tr>
<tr><td>6 PM</td><td rowspan="2">Lillian</td><td></td><td></td><td></td></tr>
<tr><td>7 PM</td><td></td><td></td><td></td></tr>
<tr><td>8 PM</td><td></td><td></td><td></td><td></td><td></td></tr>
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<tr><td>11 PM</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>MIDNIGHT</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

Daily routines

CSIL employers generally have a daily routine that employees follow. There are two main tools you can use:

- ✔ **A daily sign in/sign out sheet**
  This is a very simple, but important, tool to maintain. It gives you a record of employees' days of work, shifts, changed shifts and any missed days. This will be a valuable check at payroll time. See the sample below.

Time Card

Employee Name ___________________________ Month _____________ Year_________

Please give to employer by the first day of the new pay period so payroll can be completed. Thank you

Date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Start Time																
End Time																
Start Time																
End Time																
Hours																
Holiday																
Sick Time																
Date	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Start Time																
End Time																
Start Time																
End Time																
Hours																
Holiday																
Sick Time																
Total Hours for Month																

- ✔ **The task sheet**
  Whether your assistants are new or experienced, we highly recommend having a task sheet or checklist for each day of the week. Tasks are checked off as they are done. You can use your Supported Lifestyle Plan to create your task sheet.

Here is a sample weekly task sheet. The gray boxes are days when tasks don't need to be done. Check off tasks that will be part of your routine and use them to begin your own task sheets.

Sample Weekly Task Sheet

Task	MON	TUES	WED	THURS	FRI	SAT	SUN
Personal | Equipment							
❏ Clean wheelchair							
❏ Clean commode							
❏ Grooming							
❏ Bowel movement							
❏ Trach suction							
Cleaning							
❏ Clean/wipe out fridge							
❏ Clean bathtub/shower/tiles							
❏ Wash dishes							
❏ Change sheets							
❏ Clean toilet							
❏ Laundry							
Bedroom							
❏ Make bed							
❏ Put clothes away							

Maintain a List of Backup Staff

We mentioned in Module 2 that you need to keep a backup plan for times when scheduled staff are sick or can't come to work. This can include both individual assistants and an agency that will provide emergency back-up if your other options fall through. Agencies have different rules and charge different rates, so look into a few agencies before you decide which to include in your plan.

Keep your plan current. You don't want to find out that two of the people on your list have full-time jobs when looking for a replacement for a sick employee.

Contact everyone on your back-up plan every few months to see if they are still available to be on-call.

If you lose people on your list, you will need to find replacements by:

- reviewing your interview list for people who said "yes" to being available as a back up
- asking other CSIL employers if they have back-up staff who might like to be on your list as well

Visit the Support Worker Central website.
http://www.supportworkercentral.com

If you can't find anyone, you may need to begin advertising again.

Types of Leave

Employees are entitled to certain kinds of leave according to Employment Standards. For example:

- pregnancy or parental leave
- jury duty
- family responsibility leave
- bereavement leave.

When your employees ask for these kinds of leave, with appropriate notice, you must keep their job open for them until they return to work.

Employment Standards Branch, Leaves and Jury Duty page.
https://www2.gov.bc.ca/gov/content/employment-business/employment-standards-advice/employment-standards/time-off

Take care of your employees

We mentioned earlier in this Module that assistants may not see home support as a long-term position. So, it's up to you as the employer to create an enjoyable and respectful work environment to keep good employees.

There are many ways that you can add non-financial incentives to a work environment. This is especially important if you cannot afford to pay as high an hourly rate as you would like. Here are a few examples. Think about your individual skills and experience to see what you could offer your employees.

- If an employee is learning English, offer to practise conversation with them.
- Allow use of your internet access.
- Loan out your movies, music, or books, or let staff watch TV when you don't need them.
- Help writing letters or other correspondence.
- Send a card or a small gift at Christmas or on birthdays.

Employer golden rules

✔ Treat your employees with respect and communicate clearly.

✔ Maintain a safe and organized workplace at all times.

✔ Have clear job expectations for your employees–from tasks to behaviours.

✔ Respect employees' personal time–do not keep people after their shift ends.

✔ Do not ask employees to do tasks that are not in their job description.

✔ Pay people on time and according to all legal requirements.

✔ Schedule times for employee evaluation and feedback.

✔ Be flexible and pleasant to work for.

Acknowledge the positive. When your staff do a job well or surprise you by doing something beyond the job description, let them know. Appreciation is the most powerful non-financial reward you can give your staff.

Top ten reasons why assistants quit

1. Initial job description is incomplete or keeps changing.
2. Way in which they are asked to perform duties is illogical or inefficient.
3. Work environment is messy, unpleasant or disorganized.
4. Low pay, without appropriate raises and/or feels work is undervalued.
5. Employer communicates in a passive or aggressive way.
6. Employer favours other assistants and treats them differently.
7. Employer is dishonest about hours worked, salary owed or has inappropriate expectations (i.e., money loans, asking staff to stay late).
8. Employer makes requests to do unreasonable duties that the employer can perform alone, cannot be completed in allotted time or are too closely supervised.
9. Employer is intolerant of honest mistakes or the need for sick time.
10. Employer doesn't respect assistant's personal life and expects their needs should take priority over all else.

Performance evaluation

To be a good employer, you should provide staff with regular written evaluations of their work productivity and behaviour. This is also an opportunity for them to give feedback on the job and work environment. Evaluation is a tool to:

- determine job competence
- motivate the person to do better
- recognize accomplishments
- improve communication between you and your staff
- identify training needs
- document unsatisfactory performance.

Evaluation does not need to be time consuming or very detailed. However, identifying key areas for review and feedback can greatly benefit your working relationship with employees.

The important thing is to let your employees know when they are hired that evaluations are a routine part of employment with you. We recommend an evaluation at the end of the probationary period and then once or twice a year thereafter.

Remember to use evaluations as a positive tool, not a punitive one. Evaluations are a respectful and predictable way to identify areas that need improvement and to praise employees on good performance. Emphasize with employees that you see evaluations in this way–and that they're a time for employee feedback as well.

Finally, although formal evaluations are recommended twice a year, remember to give staff feedback on their performance on an ongoing basis.

Steps to conducting an evaluation

There are many evaluation tools available on the web. We offer one sample in this section.

Follow these steps to evaluate your employees:

1. Create your own evaluation form based on ours and/or other areas of performance that are important to you.
2. Evaluate all of your employees fairly and honestly.
3. Make time with each employee to discuss their evaluation.
4. Always find something to be positive about and let your employee know.
5. Set an approximate date for the next evaluation.
6. Finish with both of you signing the evaluation form.

Performance Evaluation Form Sample					
Place an "X" in the box that best describes employee performance. 5 = Outstanding 4 = Good 3 = Neutral 2 = Needs Improvement 1 = Unacceptable	5	4	3	2	1
ATTENDANCE/PUNCTUALITY: Keeps to scheduled working hours and work days.					
JOB DUTIES: Follows job description and described ways of performing tasks.					
COMMUNICATIONS: Communicates clearly and respectfully; understands direction well.					
QUALITY OF WORK: Produces excellent results vs. simply getting the job done.					
QUANTITY OF WORK: Produces an acceptable amount of work within the allotted time and guidelines.					
CONTRIBUTES TO POSITIVE WORK CLIMATE: Interacts well with fellow employees and/or with employer to create a pleasant work climate.					
SELF-DEVELOPMENT: Analyzes own strengths and weaknesses, accepts constructive criticism.					

Disputes with staff

We have mentioned elsewhere in this Workbook that resolving disputes with staff is Number 2 on CSIL employers least-favourite task list. If you develop some of the assertive communication skills we discussed earlier in this Chapter, you'll be able to avoid most conflicts before they become serious.

However, here are some tips for times when disagreements and disputes with staff arise.

- ✔ **Remember that you're the boss.**
  Communicate clearly and listen to your employee's point of view. In the end, however, the decision or solution is yours to make.
- ✔ **Pick your battles.**
  Weigh the pros and cons of discussing a problem. Is the problem small or large? Is the employee excellent, but they do one thing in a different way? Is the issue truly a problem?
- ✔ **Practise assertive communication.**
  If you do choose to address an issue, or an employee is bringing an issue to you, use the situation to practise communicating assertively. You'll learn by doing and observing how circumstances change through good communication.
- ✔ **Choose when to have your discussion.**
  Meet with your assistant when you're in an empowered position, for example, not in the middle of a task when you may be feeling vulnerable. Wait until you are sitting upright, at eye level with your assistant, in your work clothes–whatever helps you feel strong or more secure.

Terminating employees

Sometimes, in spite of your best efforts, you must terminate an assistant's employment with you. Termination "without cause" (often referred to as a "layoff") is usually required when there isn't enough work for the employee and/or you need to reduce costs. Termination "with cause" is usually required when the employee has been unable or unwilling to perform the basic responsibilities of their position or have been directly involved in a serious breach of their employment contract with you.

Employment Standards BC, Termination of Employment Fact Sheet page.
https://www2.gov.bc.ca/gov/content/employment-business/employment-standards-advice/employment-standards/termination

Losing your job is never easy, but it's also not an easy task for the person who must deliver the news. **The process needs to be approached in a professional and calm manner, and after careful thought.**

Never terminate someone in anger. If you don't approach the process with care, taking the proper and legal steps, the terminated employee may have grounds to file a complaint or lawsuit against you. Treat all your employees with respect and dignity, regardless of the difficulty that might arise related to their work performance.

An important note: If you feel threatened by a staff member and feel unsafe, consider terminating them immediately.

If you find that you often want to terminate staff, consider the possibility that improving your communication skills may solve problems before you get to this point. For example, are you clearly communicating what you want? Are you correcting staff when they do something wrong?

Keep copies of all correspondence on file, including written warnings and letters of termination.

If you are unsure of the steps needed, your best resource is the Employment Standards Act of British Columbia. The act specifically requires you to have just cause for terminating an employee. Examples of just cause include:

- Theft
- Fraud and dishonesty
- Assault or harassment of other assistants
- Breach of duty
- Conflict of interest, especially if it involves loss to the employer -
- Serious breach of company policies or practices
- Chronic absenteeism or tardiness
- Unsatisfactory performance.

Before you decide on termination

Consider the following points before making the decision to terminate someone's employment. This is not a complete list and it is not meant to replace the requirements of the Employment Standards Act of BC.

? Did the employee know they broke a specific policy or guideline that you had established when you hired them (e.g., being on time for work)?

? Have you spoken directly with the employee and given them warnings about your concerns and the consequences of the unacceptable behaviours (e.g., being late for work may result in termination)?

? Did you investigate the details and possible reasons for the situation (i.e., did you look into the reason why the person was late and did you provide them with the opportunity to improve)?

? Did you have enough proof that the person was responsible for the behaviour (e.g., if theft is suspected, would you be able to prove that they were the one, and the only one, responsible)?

? If you have had similar situations with other employees, you must consider how you handled the situation in those cases (i.e., you can't terminate one person for frequent lateness if you have allowed or excused others for doing the same)?

? Have you provided the person with the opportunity to change or improve their behaviour over a reasonable period of time?

? Have you maintained accurate records in the personnel file of the warnings and disciplinary actions against the employee?

Termination Process

If, after completing all of the steps above, you believe termination is justified, consider the following:

- Make arrangements for your home support services before delivering the termination notice.
- Terminating an employee can be stressful. Consider having someone with you, especially if it's your first time doing a termination.
- If there have been significant issues related to your personal safety, take the necessary steps to ensure that you maintain it (e.g., have the locks changed at home, change your phone number).
- Prepare any outstanding documentation, wages or benefits as outlined in the Employment Standards Act.
- Be respectful and professional. Prepare a script of what you need to tell the employee about the termination.
- Deliver termination news in person, unless you feel unsafe. If you do, you can notify the person by telephone or email.

- Begin with an opening statement that is direct and concise. State the facts.
- Choose your words carefully (do not argue, use harsh words or humour).
- Give essential information about why they are being terminated.
- Review and repeat the information if necessary (do not reconsider your decision or negotiate).
- If you feel you may become emotional during the meeting, refer to your notes to keep yourself focused.
- Keep the meeting going by being calm, brief, and clear. Keep the meeting short.
- Respond to questions if necessary, but keep your answers to the specifics about the reasons for the termination.
- Do not discuss the work performance or employment status of other employees.
- If the employee seems very upset, arrange for their transportation home. Do not take them home yourself.

After the terminated employee has left, your other employees may have questions or concerns. Tell them that you and the employee have ended your working relationship, but do not discuss the reasons for the termination. They may be curious, but in the long run they will respect you for not gossiping about past or present employees.

This is a challenging time. It will take time for other staff to adjust to the new situation and to the possibility of having to welcome a new employee. Be patient and let your remaining staff know of your plans for the future working relationship. Set out specific tasks for maintaining your regular routine and daily schedule.

If an employee you terminate has keys to your home, consider changing your locks. This may be a wise safety measure under any circumstances, but especially if the termination involved theft, violence, abuse, drug use or unstable behaviour.

Termination pay

Employment Standards lays out the current requirements for how much pay employees are owed upon termination.

- You do not have to pay termination pay within the three month probationary period.
- After the probationary period, between three months and 12 months of employment, you must give one week's notice or one week's pay.
- After 12 months, you must provide two weeks notice or pay, with an additional week for each year thereafter.
- You owe your assistant no compensation if you give them written notice of termination equal to the number of week's pay she is entitled to, for example, two weeks notice after twelve months of employment.
- You may also give your assistant a combination of notice and money equal to the number of week's pay they are entitled to; for example, one week's notice and one week's pay after twelve months of employment.
- You do not owe your home support assistant termination pay if they quit, retire or are fired for a serious infraction which is known as "just cause" for dismissal.

Don't put yourself at risk. If you feel you need to terminate someone immediately for safety reasons, you should do so and provide the required termination pay.

Sample Termination Letter | After Warnings Given

July 31, 2010

Lillian Wei
333 3rd Avenue
Vancouver, BC V6X 5X5

Dear Lillian:

I am formally terminating your employment with me, two weeks from today. I met with you to discuss your chronic lateness on July 17th, 2005 and followed up with a written warning on July 22nd 2005. Unfortunately, you continued to be late. I am left with no other option, but to terminate your employment.

Please return your keys to me before you stop working for me.

I will send you a Record of Employment within five days of your last day of employment and a cheque for any vacation pay you are owed.

Sincerely,

John Stevens

Sample Termination Letter | No Previous Warnings

July 31, 2010

Lillian Wei
333 3rd Avenue
Vancouver, BC V6X 5X5

Dear Lillian:

I am issuing you a formal notice of immediate termination of employment. Today, I saw you opening my bag and taking money from my wallet. I therefore have no option but to terminate your employment.

Please return your keys to me immediately.

I will send your Record of Employment five days from now. I am firing you for "just cause" as defined by the Employment Standards Act of BC and you are therefore not eligible for termination pay. I will, however, include a cheque for any vacation pay you are owed.

Sincerely,

John Stevens

Employees can dispute your decision

In rare cases, your home support assistants may dispute a decision that you make, including their termination. Assistants are entitled to go to the Employment Standards Branch if they believe you have treated them unfairly.

However, the Branch will encourage you to resolve your own disputes with staff. And, the Director of Employment Standards can refuse to investigate a complaint if a home support assistant has not taken steps to resolve the problem themselves. This includes using the self-help kit that is available on the Branch website and at all Employment Standards offices.

If a dispute cannot be resolved using the self-help kit complaint forms, the Employment Standards Branch may help you and your home support assistant try to reach an agreement before the branch issues a decision.

Employment Standards Branch, Conflict Resolution page

Required record keeping

As an employer, you have some specific responsibilities around record keeping to satisfy the regulations of Canada Revenue Agency, BC's Personal Information and Protection of Privacy Act and Employment Standards Branch.

Canada Revenue Agency

You need to keep your payroll information on all employees for seven years.

Office of the Information and Privacy Commissioner

You must also follow federal and provincial privacy laws around the gathering, storage and use of your employees' personal information. Basically, these laws state that:

- you will keep employee records in a secure place
- you will gather only information that is needed to manage your business
- you will tell employees how their information will be used
- you will not share employees' information with anyone, unless they give their permission

If you are unable to physically manage this information yourself, find a volunteer or paid staff person to assist you with your correspondence and record keeping. Some CSIL employers add this task to their bookkeeper's job description. We do not recommend assigning this task to one of your assistants. However, if you have no other options, this may work for you.

Whoever is handling your documents for you, they must sign a confidentiality letter to show that they agree to preserve the privacy of your information and/or other employees' information.

See the sample Oath of Confidentiality in the appendices.

All information gathered and maintained in a personnel file falls under the jurisdiction of the Personal Information and Protection Act of BC.

Details on privacy laws can be found at BC Laws (search for Personal Information and Protection Act under the "Laws" tab).

http://www.bclaws.ca/

Employment Standards Branch

It's also your responsibility to keep a complete, separate record on each staff person's employment with you. It needs to be organized and up-to-date.

This takes some time, but it's well worth it if you later have concerns or difficulties with a particular employee. To help maintain these files, regularly set aside time to review and keep them up-to-date. Begin a personnel file on the day you hire the person for the job.

The type of information that an employee file contains includes:

- ✔ Job description for the position
- ✔ Job application form and/or resume
- ✔ Employment Contract
- ✔ Performance evaluations
- ✔ Emergency contact information
- ✔ Information on salary and history (i.e., dates of salary increases)
- ✔ Copies of certificates of training that you paid for the employee to attend
- ✔ Letters of commendations (or other written form). If verbally provided, note the date and nature of the commendation in a log.
- ✔ Warnings or disciplinary actions (these should be removed from the file after a period of time if the employee's performance has improved). Always date the entries. You cannot make notes of this nature in the file, unless you have spoken to the employee first about the issue.
- ✔ Notes on attendance or tardiness. Always date the entries. You cannot make notes of this nature in the file, unless you have spoken to the employee first.
- ✔ Any contract or written correspondence between you and the employee.
- ✔ Any written contract or written correspondence between you and the employee regarding the employee leaving your employment (e.g., resignation, termination, layoff, or other reason).

Moving or leaving CSIL

You may find yourself in a situation where you are moving to another health region or leaving CSIL entirely. If so, you'll need to plan ahead and have assistance with changing your delivery of home support services.

Discontinuing or altering CSIL

It's important to know that CSIL service accommodates many personal situations. You will continue to receive funding for most situations including vacation, temporary moves, changing jobs/hours or services in the workplace. Discuss any changing personal circumstances with your case manager as soon as you are aware of them.

In rare cases, a CSIL employer may permanently discontinue CSIL services for a variety of reasons, such as:

- you may be moving to another province or country
- you may need to move to a care facility because of changes in your health status or disability
- you find that you want to return to an agency-delivered service
- your Phase II representative or Client Support Group can no longer manage services for you
- your CSIL agreement has been terminated because of mismanagement of funds.

Once you have made your decision to discontinue CSIL, notify your case manager as soon as possible. And remember, if you discontinue CSIL, it will be important to give your staff the proper notice of termination.

Portability of CSIL If You Move Permanently

You may decide to make a permanent move from one health authority to another or you may choose to discontinue CSIL services. In either case, you should work in partnership with your case manager to make a smooth transition.

When you make a permanent move from one health authority to another, the new health authority will honour the assessed hours from the original health authority for 60 days or a negotiated time frame between the two health authorities, unless there are special circumstances.

Whenever possible, you are required to provide reasonable notice to your current health authority, as well as the new health authority, of the pending move.

It is important to talk with your case manager well in advance about your plans to move, so that you can think about the details that will be needed for you to transition to the new health authority.

Health authorities will reassess clients who move to ensure the client's needs are being met because, while client needs may not change with a move, their living situation may change or the services available in the new location may change. If the circumstances are similar after a client relocates, such as living conditions, health status and client support, it is expected that the approved hours will remain similar.

Steps to follow

- Decide if you want to move.
- Talk to your case manager well in advance about your plans to move. Ask whether or not you will need to reapply for CSIL in your new neighbourhood.
- Discuss all the steps that will be needed for you to remain on CSIL.
- Use this Workbook to help you with the re-application and set-up process as needed.

Chapter summary

At the beginning of this Chapter, we emphasized the importance of understanding your communication style and becoming an assertive communicator. Respectful and constructive communication is one of the most important skills you can develop as an employer. It creates a pleasant environment that makes coming to work enjoyable for employees. It also increases people's understanding of your preferences and needs and it enables you to better understand your employees' needs and ideas. Small issues or misunderstandings between you and your staff can be resolved before they become big issues.

Orientation and training of staff begins in the new employee's training period and continues during the person's employment with you. We provide some orientation tools and tips for you to use to give staff a good understanding of the job and all the necessary tasks. Involving one of your experienced assistants in the training, can be the best way to pass on the how-to's of your services and the work spaces in your home. Be clear and patient during the training period, giving staff time to learn and ask questions.

Your assistants' schedule is also something that's adjusted over time. Your needs may change, you may learn new ways to combine tasks and save time, and you'll discover the strengths and weaknesses of your staff and the best times to schedule them in. Do your best to use a schedule for at least a couple of months, so your staff have a dependable work schedule.

We recommend having some daily and weekly checklists so staff always know what needs to be done and you have a way to track progress. These forms are simple to create and will give you the information you need to stay informed on areas for improvement or praise, as well as hours worked or time staff have taken off.

Remember that it's very important to have a list of back-up staff for times when staff aren't able to work. This includes a home support agency as the final back up should all your other replacements be unavailable.

It's also important to find some non-financial "perks" for your staff to make their employment with you a positive experience. There are many small ways you can do this and they can make all the difference to the quality of your relationship with your staff and the length of their employment with you.

Take time to do regular performance evaluations with your staff. This doesn't need to be a long process, but doing this twice a year will let staff know that you want to maintain good work performance, give staff the opportunity to share ideas or issues and praise areas where staff are doing well.

If situations arise where there are disputes with staff, your understanding of assertive communication will be a valuable resource. Do your best to be clear about problems, listen to your staff's point of view and decide on clear actions to resolve problems. You'll need to handle disputes with professionalism, so keep written notes of discussions with staff. If problems continue, you may consider terminating the employee and some written records of discussions will be needed. There are things to consider before you terminate someone and a process to follow to make necessary terminations as professional as possible. If this is your decision, be sure to follow Employment Standards Guidelines on terminations.

Disciplinary notes, termination letters and other documents related to each of your employees must be kept and kept private.

Finally, if for some reason you will be leaving CSIL or moving to another city, province or country, talk to your case manager well in advance. They will advise you on available services in the city you're moving to.

Chapter Review

What is your main style of communication?
❏ Passive ❏ Aggressive ❏ Assertive
What can you do to develop a more assertive style of communication?
What are some signs of poor communication?
Which training recommendations or tools do you plan to use?
How will you decide on your weekly schedule for assistants?

Name three things you can do for or with your assistants as a non-financial incentive.
1. 2. 3.
What do you think are the most important Employer Golden Rules?
Name three main topics you would include in your employees' performance evaluations.
1. 2. 3.
If you have a dispute or misunderstanding with one of your staff, how would you try to resolve it?
What are some "just causes" for terminating an employee?

Name four important steps to take before you terminate an employee.
1. 2. 3. 4.
What did you learn about the records you need to keep and how you keep them?
If you're planning to move or to leave CSIL, who should you contact for information and assistance?

Next Steps

1. Enjoy the control and flexibility CSIL offers.
2. Think about being an employer and what seems easy for you and what seems 2. more difficult. Appreciate the things you can do easily and make a point of learning about or practising the things you find more challenging, such as communicating assertively or bringing up something that troubles you.
3. Find the support you need to manage different parts of CSIL. If it takes so much 3. of your energy, you won't have much left for things you enjoy.

Conclusion

Being a CSIL employer takes time, especially at the beginning when you're finding your way. But the benefits of CSIL are enormous. People who go on CSIL discover a level of freedom and control that is life-changing.

Our intention with this Workbook is to give you all the information you may need at different times in your transition onto CSIL. It's possible you may have felt a bit overwhelmed at times looking through these pages! It's true there is a lot to know and a lot to learn.

But, do remember:

- Many CSIL employers think the effort involved is more than worth it.
- You don't have to learn everything at once. Do the most important things first and learn as you go along.
- If you work on some of the key tools we recommend in the Workbook, like the Supported Lifestyle Plan, they'll be a great help in planning different parts of your CSIL services.
- Find support for the tasks you find the hardest.
- Come back to this Workbook when you need it: e.g. when you want to learn how to write an ad, plan your weekly schedule or write an employment contract.
- Don't try to do it all alone. Find people to help you plan, brainstorm and prepare for CSIL, or talk to CSIL employers you know.

Good luck!