



Chapter 6

Examples and templates you can use

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Also includes:

- Filing checklist
- Code of Practice for Disciplinary and Grievance Procedures

Chapter 6

Examples and templates you can use



This chapter includes examples of some of the things mentioned earlier in the guide, and templates of useful documents and forms which you can use if you want to. You don't have to use these forms, but it's important to keep some kind of record of most of this information.



See the filing checklist near the end of this chapter for a list of what you should keep on file.

Not all of these pages have page numbers on them. This is so you can copy and use them if you want to. If you don't have access to a photocopier or scanner ask your **Personal Budget Advisor** if they can provide copies.

Before you start employing someone it's a good idea to talk through how to use these different forms with your **Personal Budget Advisor**.



All forms and templates are available electronically at www.leeds.gov.uk/PAs

We gratefully acknowledge Manchester City Council Social Care for their kind permission to reproduce some of the content of these forms.



Forms and examples available in this section:

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- **Filing checklist**
- **ACAS Code of Practice for Disciplinary and Grievance Procedures**

Sample job description

PERSONAL ASSISTANT

LOCATION: LS6, Leeds, West Yorkshire

Note: Due to the sensitive nature of this position no offer of employment can be made until the applicant has undergone a CRB check, arranged by the prospective employer.

Purpose of job:

I am disabled as a result of a spinal cord injury. My personal assistant will be required to assist me in most of my day-to-day domestic and personal care needs, so I can live as independently as possible. The PA will also act as a confidential escort, assistant and companion in my daily activities.

My assistant must be able to handle a range of physical skills such as regular lifting, handling and bending, so good physical health is important. They will need to be willing to act under my direction, but confident enough to ask what my needs and preferences are.

Main activities:

1. Assist with personal care, including skincare, bathing, shaving, oral care, using the toilet, dressing, hair care.
2. Enable mobility, including moving, lifting and handling, pushing wheelchair, checking of specialist equipment e.g. wheelchair seat cushion, driving of my car, as directed. Help with some daily physiotherapy movements. Assist with upkeep of mobility equipment, e.g. hoists.
3. Perform day-to-day household tasks, including making and changing beds, laundry, ironing, shopping.
4. Provide dietetic support, including menu planning, preparing, serving and cutting of foods. Storing of foods. Washing up and tidying after meals.
5. Assist with activities of daily living as required, e.g. working, leisure, education.
6. Assist with administration of prescribed medications.
7. Deal with correspondence and administrative matters as requested.
8. Negotiate breaks with me to ensure that these are mutually suitable, while ensuring working hours do not exceed those agreed in the statement of employment terms.



... Sample job description continued

9. Undertake relevant training as required.
10. Demonstrate a positive and non-discriminatory approach to diversity and equality of opportunity.
11. Adhere to any health and safety rules as agreed between ourselves.
12. Respect my privacy, confidentiality, dignity, property and premises of the client at all times.

Person specification

The PA should always be prepared to ask what my needs or wishes are and listen to requests and directions. General good health and fitness would be an advantage as the PA will need to perform regular activities such as lifting, pushing and bending. Needs will sometimes vary from day to day, and duties will alter accordingly, so the PA should be flexible.

The PA should be able to appreciate the strain felt by a disabled person trying to live their life as independently as possible, while having to rely frequently on the support of others. The PA must respect the fact that the person whose lifestyle they are helping to maintain is their employer, and as such will be the one making the decisions.

The PA must consent to CRB check being carried out before an offer of employment can be made.

Essential requirements

Physically capable to perform tasks required (lifting, moving etc)

Friendly, supportive and co-operative

Trustworthy and discreet

Ability to respect my property and home (use of telephone, heating, television, radio etc are at my discretion)

Willingness to learn the job and be trained in use of equipment if required

Ability to work confidently with or without direct supervision

Good basic level of spelling, writing, reading and maths

Basic computer skills (e.g. type and send an email, perform a web search)

Basic cooking skills

Patient, flexible and adaptable to change

Clean and neat appearance

... Sample job description continued

Understanding and sensitivity towards others. The preservation of my dignity and independence is extremely important to me.

Desirable requirements

Ability to communicate clearly, confidently and effectively in writing and verbally with a range of different people in different settings

Able to deal confidently with figures

Clean driving licence

Experience and qualifications

At least a year's experience in a similar role is preferred.

A good basic level of education is preferred, as PA needs to be able to handle correspondence and some administrative work

[If you need the PA to have any specialised training you should mention it here, e.g. NVQ qualification in care.]



Job advertisement examples

These are examples of real advertisements for personal assistants placed in UK newspapers.

Personal assistant required

I am paralysed from the shoulders down and use a powered wheelchair. I need support with most activities in order to live a good lifestyle.

Duties include helping me: get me up in the morning, showering, going to the toilet, cooking, housework, driving and help with all those other little things I can't do for myself. No previous experience required as all necessary training will be provided.

You will share the work with another care assistant, working four days/week with three days off. You should hold a clean driving licence and understand basic English.

Please ring (0113) xxx xxxx for further details and an application form. References will be required and the post is CRB checked. Applications close on xxxx.

Want a change from the 9-5 working day?

Lively disabled woman requires assistance with all aspects of daily life, practical personal support and mobility on a 24 x 7 basis (THIS IS NOT A CARE POSITION). Are you a hard-working, self-motivated fast learner, with a high level of physical fitness?

A full clean UK driving licence and at least one year's driving experience essential.

Please text your name and address to xxxx xxx xxx to request further details and be sent an application pack.

... Job advertisement examples continued

Personal assistant

Personal Assistants (PAs) required to assist 19-year-old male. Two full-time positions and casual part-time work is available. You will provide general help, take care of personal needs (showering, dressing, using the toilet etc), light housework, washing, playing the playstation and watching the occasional DVD. You must be a confident, competent driver (essential). I am an electric wheelchair user who enjoys socialising, pub, cinema and meeting friends.

The full-time positions average 41 hrs per week on a 3 or 4 day cycle including weekend work. The casual part-time work is between 6pm and 11pm some weekdays and occasional overnights. Rates of pay are £xxx per hour weekdays and £xxx per hour on weekends. Previous caring experience preferred but not essential.

Please email me at xxxxx@xxxx or ring (0113) xxx xxxx for further details. References will be required and the post is CRB checked.

Personal Assistant application form

Title of post

Reference number

Name

Address

.....

..... Postcode

Home tel. no

Mobile

Email

1. Work experience

Give full details of your current job and previous work experience below. Include explanations for any gaps between periods of employment.

| Name, address and phone number of employer | Dates you worked there (to and from) | Brief description of your duties | Reason for leaving |
|--|--------------------------------------|----------------------------------|--------------------|
| | | | |

2. Education and qualifications

Include details of any relevant training, languages you can speak, etc.

| Training or education course | Qualification, grade or level obtained |
|------------------------------|--|
| | |

3. Please explain why you are interested in this position and what relevant skills or knowledge you have (attach a separate sheet of paper if you need more space).

.....
.....
.....

4. Please tell me a bit about yourself - interests, hobbies etc.

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.....
.....
.....
.....

5. Do you hold a current driving licence? YES/NO

6. Is there anything else you would like to add in support of your application?

.....
.....
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.....

7. References

Please give the name and address of two referees – one of these must be your current or last employer. They will not be contacted unless your application is successful.

.....
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.....
.....

8. Criminal Record (CRB) check and ISA registration

This role meets the requirements in respect of exempted questions under the Rehabilitation of Offenders Act 1974. Before a preferred applicant can be offered employment they will be subject to a Criminal Record Check from the Criminal Records Bureau. This will include details of cautions, reprimands or final warning, as well as convictions.

The presence of such information will not necessarily preclude the applicant from being appointable.

The successful applicant must be registered with the Independent Safeguarding Authority (from November 2010).

.....

DECLARATION: This information is, to the best of my knowledge, accurate and complete.

Signed Date

Please return this signed application form to:

Employer's address
.....
.....

Sample interview questions

Here are examples of some of the things you could say, and questions you could ask when interviewing for a PA. Not all of them will be relevant to the person you are interviewing, so make sure you read through their application and/or CV again just before the interview so it's fresh in your mind.

Sample questions

- Have you ever assisted a disabled person to do something? If so, what was it and how did you do it?
- I will need to tell you how to do things the way I want them done, even if you might have done them differently in the past. How do you think you would cope with this?
- What if I ask you to do something and you would prefer to do it a different way because you think that way would work better? What would you do? Can you give me an example of where this has happened in the past?
- I feel quite strongly about the way some things are done around my home. How would you react if you have done something but I want it done again in another way – and then perhaps I'm still not happy, and have to ask you to do it a third time?
- If we had a difference of opinion, how do you think you would deal with this? Can you give me an example of where this has happened in the past?
- I am looking for someone to work XX shifts. Can you do that?
- How would you feel if I called you in on short notice to do more than your usual hours – for example, if one of my other PAs went off sick, or if I suddenly had to change my plans?
- Do you have a car? Would you be prepared to use it for work (if you want someone to use their own car for work, you'll have to think about paying them for this and covering any additional insurance – [see page 26](#))
- How would you feel about using my car to drive us places? (Again, there are insurance implications – [see page 26](#))
- Why do you want to leave your current job? (or – Why did you leave your last job? As appropriate).
- Which parts of your current/last job did you like most? Which part did you like least?
- How do you feel about doing X/Y/Z with me? (e.g. gardening, socialising, any regular commitments which could fall into the PA's shift). What kinds of activities have you accompanied your employer to in the past?
- What are your hobbies and interests?
- I have a pet dog/cat/hamster etc – would that be a problem? (If you need them to help you look after it, describe what they would need to do and check if this is OK).

Sample letter to referee

Mrs D Okoro
10 Flowerpot Lane
Headingley
LS6 1AB

1 January 2010

Reference for Ms Candice Anne Bruckner

Dear Mrs Okoro

I am appointing a personal assistant. This position will involve support with housework, accompanying me to the shops and unaccompanied shopping, some moving and handling as well as personal care.

Ms Bruckner has given me your name as a referee. I would be grateful if you could send me a written reference to the address below, describing briefly the duties Ms Bruckner performed while working for you, and your opinion of her suitability for this role.

As I am hoping to have someone start quite soon, I would appreciate it if you could respond at your earliest convenience.

Yours sincerely,

Your name

Correspondence address

Contact telephone number

Health and safety risk checklist

Employee's name

Employer's name

Address of property

.....

.....

.....

| Risk checklist | | | |
|---|-----------------------|-----------------------|------------------------------------|
| 1. General | Yes | No or N/A | Risks identified or other comments |
| Is the property well-lit inside and outside? | <input type="radio"/> | <input type="radio"/> | |
| Are there any problems with the flooring, e.g. uneven/slippery areas, awkward steps, loose rugs or trailing cables? | <input type="radio"/> | <input type="radio"/> | |
| Do hot surfaces, e.g. radiators, pose a risk of burning? | <input type="radio"/> | <input type="radio"/> | |
| Are heavy or frequently used items easy to reach? | <input type="radio"/> | <input type="radio"/> | |
| Any other hazards? | <input type="radio"/> | <input type="radio"/> | |

Continued overleaf

Risk checklist continued

| 2. Fire Safety | Yes | No or N/A | Risks identified or other comments |
|--|-----------------------|-----------------------|------------------------------------|
| N.B. The West Yorkshire Fire and Rescue Service can carry out a Home Fire Risk Assessment and answer any questions you may have about reducing fire risks - contact them on 0800 587 4536. | | | |
| Is a smoke alarm fitted and working? | <input type="radio"/> | <input type="radio"/> | |
| Is there anything in the home which would indicate a higher than normal risk of fire, e.g. smoking, oxygen cylinders, piles of papers? | <input type="radio"/> | <input type="radio"/> | |
| Any other fire hazards? | <input type="radio"/> | <input type="radio"/> | |
| 3. Moving and handling | Yes | No or N/A | Risks identified or other comments |
| Complete only if help is needed with tasks such as transfers in or out of bed, chairs, bath or shower and with using the toilet | | | |
| Is hoist or other lifting/handling equipment working properly? | <input type="radio"/> | <input type="radio"/> | |
| Is hoist or other lifting/handling equipment checked regularly? | <input type="radio"/> | <input type="radio"/> | |
| Any other hazards? | <input type="radio"/> | <input type="radio"/> | |
| 4. Medication | Yes | No or N/A | Risks identified or other comments |
| Is medication given to you by your PA? | <input type="radio"/> | <input type="radio"/> | |
| Is it part of your PA's job to remind you to take medication? | <input type="radio"/> | <input type="radio"/> | |
| Do you keep a record of what medicines you take? | <input type="radio"/> | <input type="radio"/> | |
| Any hazards/further comments? | <input type="radio"/> | <input type="radio"/> | |

Continued overleaf

Risk checklist continued

5. Home appliance - quick safety check

N.B. The West Yorkshire Fire and Rescue Service can carry out a Home Fire Risk Assessment and answer any questions you may have about reducing fire risks - contact them on 0800 587 4536.

| Appliance | OK? | Risks identified or other comments |
|---|-----------------------|------------------------------------|
| Cooker | <input type="radio"/> | |
| Toaster | <input type="radio"/> | |
| Kettle | <input type="radio"/> | |
| Iron | <input type="radio"/> | |
| Electric fire / heater | <input type="radio"/> | |
| Vacuum cleaner | <input type="radio"/> | |
| Boiler (checked/serviced in the last year?) | <input type="radio"/> | |
| Any other hazards? | <input type="radio"/> | |

6. Other members of household/pets

| | Yes | No or N/A | Risks identified or other comments |
|---|-----------------------|-----------------------|------------------------------------|
| Are there any people in the household whose behaviour might pose a risk to your PA? | <input type="radio"/> | <input type="radio"/> | |
| Are there any pets in the house which might pose a risk to your PA? | <input type="radio"/> | <input type="radio"/> | |
| Any other hazards? | <input type="radio"/> | <input type="radio"/> | |

7. Vehicle

| | Yes | No or N/A | Risks identified or other comments |
|--|-----------------------|-----------------------|------------------------------------|
| Will the PA be driving or accompanying you in a vehicle as part of their work? | <input type="radio"/> | <input type="radio"/> | |
| If yes, do all drivers hold a valid driving licence? | <input type="radio"/> | <input type="radio"/> | |
| Is the insurance and MOT on the car up to date? | <input type="radio"/> | <input type="radio"/> | |
| Does the insurance cover your PA? | <input type="radio"/> | <input type="radio"/> | |
| Any other comments/risks? | <input type="radio"/> | <input type="radio"/> | |

Location of items in or around your home

Gas shut-off valve

Gas meter

Boiler

Electricity fuse box

Stop tap for water

Escape route in case of emergency

Fire hydrants/blankets

Nearest public telephone

List any other important items as appropriate

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Health and safety accident record

Employee's name

| Date of incident | What happened? | Any resulting injury? | Action taken |
|------------------|----------------|-----------------------|--------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

PA signature

Employer signature Name

Date (end of reporting period)

New employee details

| | |
|-----------------------------|-----------|
| Employers name..... | |
| Employers Reference no..... | Date..... |

Title.....

Surname Forenames

Address

.....

..... Postcode

Home tel Mobile

Emergency contact name Tel

National Insurance No..... DOB

Date employment commenced

Bank Account name

Sort code Account number

| | |
|-------------------|-----------|
| Completed by..... | Date..... |
|-------------------|-----------|

Change of employee details

Employers name.....

Employers Reference no..... Date.....

Title.....

SurnameForenames

New surname

New address

.....

..... Postcode

Home tel Mobile

Emergency contact name Tel

Date of change.....

Bank Account name

Sort code Account number

Completed by Date

Employee leaver form

| | |
|-----------------------------|-----------|
| Employers name..... | |
| Employers Reference no..... | Date..... |

Title.....

Surname Forenames

Date employment finished

Reason(s) for leaving

.....

Address

.....

..... Postcode

Outstanding payments due employee £.....

Deductions from employee wages £.....

| | |
|--------------------|------------|
| Completed by | Date |
|--------------------|------------|

Personal Assistant's timesheet

Employee's name

Week commencing

| Day | AM | | | PM | | | Hours worked |
|---------------------------|-------|--------|----------------------------------|-------|--------|----------------------------------|--------------|
| | Start | Finish | Brief description of duties/care | Start | Finish | Brief description of duties/care | |
| Monday | | | | | | | |
| Tuesday | | | | | | | |
| Wednesday | | | | | | | |
| Thursday | | | | | | | |
| Friday | | | | | | | |
| Saturday | | | | | | | |
| Sunday | | | | | | | |
| Total hours worked | | | | | | | |

I confirm that the above duties have been carried out as recorded above during the period stated.

Employee's signature (PA) Name

Employer's signature Date

A filing checklist

Once your PA has been working with you for a while, you should have the following things on file, so they are easy to find when you need them. This is just a general guide – your Personal Budget Advisor can tell you if there is anything here you don't need or if there are any additional requirements.

- **Your original job advertisement and PA job description**
- **Your PA's application - including their CV and/or application form and any letters or emails sent between you during the recruitment process**
- **Any written references you received**
- **A copy of your PA's signed statement of employment terms**
- **Any correspondence relating to the CRB check**
- **Proof your PA can legally work in the UK**
- **A copy of your PA's current, valid driving licence, if the job involves driving**
- **If your PA is self-employed, evidence from HMRC**
- **A copy of the ACAS Code of Practice for Disciplinary and Grievance Procedures (included in this guide)**
- **Notes of any formal disciplinary issues (the PA should be made aware of these, if they are on file)**
- **A copy of the risk checklist**
- **Employee details**
- **Change of employee details**
- **Leaver notification - for any employees who have left**
- **Your PA's timesheets**
- **Copies of your PA's wage slips**
- **Bank statements for your personal budget account**
- **Holiday leave form**
- **Sickness absence record - and any doctor's certificates or self-certifications**
- **Pension information, if you employ five or more people**
- **Health and Safety accident record**
- **Insurance details**
- **Copies of any correspondence about any of these subjects**

