

Consumer Checklist

Consultant:	
CM/PA/SC's Name:	
CM/PA/SC's Email Address:	
Referral Date:	

Consumer-Employer/Individual			
Name:			
Program*:	Blank	Agency**:	Blank
CPMS/Prime #:		Area Code:	Blank ID:
Representative/ Common Law Employer/Proxy:			
Phone:		Email Address:	
Initial Meeting Date:		County	
Preferred pronoun of consumer or representative?			
Consumer/Employer served in previous years? <input type="checkbox"/>			
Consultant Primarily Worked with Blank			
Consumer/Employer (of Record, etc.) may not be able to manage their responsibilities. <input type="checkbox"/>			
*APD Case management referral for requesting work not included on Task List. <input type="checkbox"/>			
Unhealthy or unsafe work environment. (see notes section for more details). <input type="checkbox"/>			
Case management referral-assist consumer in providing worker requested ADA accommodations such as scheduling, etc. (see notes section for more details). <input type="checkbox"/>			

Issues/Concerns or Topics of Interest	
New to services or New Representative/Employer of Record (The Big Picture)	
Understanding Your Role as an Employer <input type="checkbox"/>	Finding and Hiring a Worker <input type="checkbox"/>
After You Hire Your Worker <input type="checkbox"/>	Schedule When Your Employee Works <input type="checkbox"/>
<i>Weekly Schedule</i> <input type="checkbox"/>	<i>Multiple Week Schedule</i> <input type="checkbox"/>
Oversee Your Worker <input type="checkbox"/>	Dismissing a Worker <input type="checkbox"/>
Review <i>Understanding How Your Homecare Worker Gets Paid</i> <input type="checkbox"/>	Review <i>What you Need to Know as an Employer of a Personal Support Worker</i> <input type="checkbox"/>
Notes:	
Before You Hire a Homecare or Personal Support Worker	
Determining Your Needs <input type="checkbox"/>	Review <i>Figuring Out What I Need</i> <input type="checkbox"/>
Attributes to Look for in Your Worker <input type="checkbox"/>	Review <i>Creating a Job Description</i> <input type="checkbox"/>
<i>Job Description</i> <input type="checkbox"/>	
Notes:	
The Hiring Process	
Hiring and Managing Workers <input type="checkbox"/>	Hiring Steps <input type="checkbox"/>
Review <i>Creating a Help Wanted Ad</i> <input type="checkbox"/>	Review <i>Interview Resource Sheet</i> <input type="checkbox"/>
<i>Interview Questions</i> <input type="checkbox"/>	<i>Reference Check Questions</i> <input type="checkbox"/>
Review <i>How to Develop a Back-Up Plan</i> <input type="checkbox"/>	<i>Back-Up Plan</i> <input type="checkbox"/>
Review <i>Is This the Right Worker for Me?</i> <input type="checkbox"/>	

*Only Consultants providing APD services need to complete this.

**Only Consultants providing DD/MH services need to complete this.

Notes:

Getting Off on the Right Foot with Your Worker

Building a Successful Working Relationship <input type="checkbox"/>	Tips to Help You Communicate Successfully with Your Worker <input type="checkbox"/>
<i>Daily Sign-In</i> <input type="checkbox"/>	<i>Initial Evaluation</i> <input type="checkbox"/>
<i>Performance Evaluation</i> <input type="checkbox"/>	<i>Mileage Log</i> <input type="checkbox"/>
<i>Cash Record</i> <input type="checkbox"/>	

Notes:

Warning Signs of an Unacceptable Worker

Be Alert to Possible Problems <input type="checkbox"/>	Warning Signs of Possible Abuse <input type="checkbox"/>
Review <i>Warning Signs of an Unacceptable Worker</i> <input type="checkbox"/>	Review <i>Protecting Yourself Against Fraud and Financial Exploitation</i> <input type="checkbox"/>

Notes:

Terminating and Replacing a Worker

Terminating a Worker <input type="checkbox"/>	
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Notes:

Household Safety and Emergency Planning

Your Safety is a Top Priority <input type="checkbox"/>	Review <i>DHS 9063 Safety Manual for Homecare Employers</i> <input type="checkbox"/>
<i>Emergency Planning Checklist</i> <input type="checkbox"/>	<i>Emergency To-go Checklist</i> <input type="checkbox"/>
<i>Household Safety Checklist</i> <input type="checkbox"/>	

Notes:

Resources and Tools

Notes:

Additional Topics

Transitioning from NF/AFH/Other <input type="checkbox"/>	Multiple HCWs/PSWs <input type="checkbox"/>
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Other:

General Notes:

Work Environment Notes:

Worker Request ADA Accommodations Notes: