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What is Respite Care?

- ❖ Respite care offers individuals or family member's temporary relief from the daily routine and stress that can come with providing ongoing care.
- ❖ Respite can play a critical role in strengthening family stability and maintaining the health of the caregiver.
- ❖ Even though many families take great joy in providing care to their loved ones the physical, emotional and financial consequences for the caregiver can be overwhelming. Sometimes caregivers are so busy caring for others that they ignore their own needs.
- ❖ No matter how much you love the person you are caring for, you need regular breaks from caregiving.

What is the Idaho Lifespan Respite Program?

The Idaho Lifespan Program is operated through the Area 3 Senior Services Agency. The program allows the primary caregiver to hire and pay someone from their support network. In this program, you manage your respite time and budget.

- ❖ You may hire a family member, friend, neighbor, etc. An agency or facility can also be used for respite services.
- ❖ Respite provided in this manner offers a family member the flexibility to use respite when needed.
- ❖ Hiring your own respite provider usually cost less than using an agency respite provider.
- ❖ Voucher respite allows the caregiver to hire someone who is familiar with the individual in need of care and equipped to handle the specific situation.



Who is eligible?

- ❖ Caregivers must be at least 18 years old and an Idaho resident.
- ❖ The caregiver must be providing unpaid care to someone of any age with a significant disability, special need or chronic illness.
- ❖ Lives with the care recipient, or if the primary caregiver does not live with the care recipient, the caregiver must be providing frequent on-site visits throughout the day, which are essential to assure the client's health and safety. For example, the care recipient would be unable to get out of bed, prepare a meal, etc., in the absence of the caregiver.
- ❖ Caregivers are not eligible if current in-home respite is being provided through another agency. For example, Medicaid A&D Waiver, Veterans Respite, Certified Family Home.
- ❖ Not eligible if care recipient is in institutional setting.

How to apply?

Contact the Lifespan Respite Coordinator, Julie Torresani at 208-898-9626 or Julie.torresani@a3ssa.com. An enrollment packet will need to be completed by the caregiver and the Lifespan Respite Coordinator to determine eligibility and enrollment into the program.

Complaints or grievances may be filed to Raul Enriquez, Executive Director, Area 3 Senior Services Agency. All complaints will be reviewed and investigated. A3SSA will respond to complaints by phone within three business days of receipt and will provide a written resolution within 5 business days of the call.



How does the Idaho Lifespan Respite Program work?

The Idaho Lifespan Respite Program is a voucher program. Vouchers are simply a paper form that documents the date and hours respite took place, who provided the respite, rate of pay and signatures.

- ❖ Once a caregiver is authorized for the respite program, the caregiver will receive an authorization letter, timesheets, and voucher information.
- ❖ Respite vouchers are valid for **six (6) months** and **will not exceed \$600.00**.
- ❖ Caregivers are authorized for two (2) vouchers per year.
- ❖ Caregivers may use their funds all at once or in increments over the approved 6 months.
- ❖ **Only the primary caregiver is permitted to request payment.**
- ❖ Any unspent portion of the voucher will be forfeited and will not be rolled over.
- ❖ The caregiver is responsible for tracking the balance of the voucher. A3SSA will also provide a summary of what has been paid out and the balance remaining.
- ❖ The Lifespan Respite Program will not reimburse any respite services provided before the voucher authorization.
- ❖ These funds are strictly for respite services only and cannot be used to pay for any other needs such as rent, utilities, medical equipment etc.



Choosing a Respite Provider

- ❖ The primary caregiver is responsible for selecting, hiring and training the respite provider of their choice.
- ❖ The caregiver can hire multiple respite providers if they choose.
- ❖ The respite provider is at least eighteen (18) years of age.
- ❖ The caregiver and respite provider agree on a rate of pay that is fair and reasonable. (See Tips on Finding/Hiring/Training Respite Providers)
- ❖ The caregiver and respite provider agree on a payment schedule.
- ❖ The caregiver pays the respite provider at time of service or the respite provider may agree to wait until the voucher has been paid before receiving payment.
- ❖ Because payment is issued to the caregiver and there is no contractual agreement between the provider and A3SSA, it is the provider's responsibility to report any earning to the IRS for tax purposes.



Payment of the Voucher

- ❖ When respite service is completed, the respite provider and caregiver sign the timesheet to indicate the date, hours worked, rate of pay and the total amount claimed.
- ❖ The caregiver pays the respite care provider at time of service or the respite provider may agree to wait until the voucher has been paid to receive payment. This is an agreement the caregiver and respite provider must arrange.
- ❖ The caregiver sends the completed voucher timesheet to the Lifespan Respite Coordinator.
- ❖ The Lifespan Respite Coordinator will approve the timesheet and issue a reimbursement check to the caregiver for the amount billed.
- ❖ A schedule is provided for timesheet reimbursement by A3SSA.
- ❖ The caregiver is responsible for tracking the balance of the voucher. (A3SSA will also mail a summary of what has been paid out and the balance remaining.)
- ❖ The caregiver is financially responsible for any hours billed which exceed the amount authorized.
- ❖ The caregiver has 30 days to submit for reimbursement after the voucher expires.
- ❖ Because payment is issued to the caregiver and there is no contractual agreement between the provider and A3SSA, it is the provider's responsibility to report any earning to the IRS for tax purposes.



www.a3ssa.com

Idaho Lifespan Respite

What is Idaho Lifespan Respite?

Respite is a break for caregivers providing care to someone of any age with a significant disability, special need or chronic illness.

- ◇ Caregivers may hire from their support network such as family member, friend or a familiar individual.
- ◇ Caregivers are issued a voucher worth \$600 for 6 months to use for their respite needs. Eligible for 2 vouchers a year.
- ◇ Caregivers set their respite schedule, hire who they choose as a provider and manage their budget.

Who is eligible under Lifespan Respite?

- Caregivers must be at least 18 years old and an Idaho resident.
- The caregiver must be providing unpaid care to their loved one.
- Currently not receiving paid respite care through another agency.
- The caregiver lives with the care recipient, or if the primary caregiver does not live with the care recipient, the caregiver must be providing frequent on-site visits throughout the day, which are essential to assure the client's health and safety.

For more information contact Julie Torresani at (208)898-9626

Email: julie.torresani@a3ssa.com.

Idaho Lifespan Respite Calendar

2020

| January 2020 | | | | | | |
|--------------|----|----|----|----|----|----|
| S | M | T | W | T | F | S |
| | | | 1 | 2 | 3 | 4 |
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| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

| February 2020 | | | | | | |
|---------------|----|----|----|----|----|----|
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| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |

| March 2020 | | | | | | |
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| April 2020 | | | | | | |
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| May 2020 | | | | | | |
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| June 2020 | | | | | | |
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| July 2020 | | | | | | |
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| August 2020 | | | | | | |
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| September 2020 | | | | | | |
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| October 2020 | | | | | | |
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| November 2020 | | | | | | |
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| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

| December 2020 | | | | | | |
|---------------|----|----|----|----|----|----|
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| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

Time Sheet Due

Check Mailed

Holiday

**Idaho Lifespan Respite Program
Reimbursement Schedule**

| Timesheet Due | Check Issued and Mailed |
|----------------------|--------------------------------|
| 1/10/2020 | 1/17/2020 |
| 1/24/2020 | 1/31/2020 |
| 2/7/2020 | 2/14/2020 |
| 2/21/2020 | 2/28/2020 |
| 3/6/2020 | 3/13/2020 |
| 3/20/2020 | 3/27/2020 |
| 4/3/2020 | 4/10/2020 |
| 4/17/2020 | 4/24/2020 |
| 5/1/2020 | 5/8/2020 |
| 5/15/2020 | 5/22/2020 |
| 5/29/2020 | 6/5/2020 |
| 6/12/2020 | 6/19/2020 |
| 6/26/2020 | 7/3/2020 |
| 7/10/2020 | 7/17/2020 |
| 7/24/2020 | 7/31/2020 |
| 8/7/2020 | 8/14/2020 |
| 8/21/2020 | 8/28/2020 |
| 9/4/2020 | 9/11/2020 |
| 9/18/2020 | 9/25/2020 |
| 10/2/2020 | 10/9/2020 |
| 10/16/2020 | 10/23/2020 |
| 10/30/2020 | 11/6/2020 |
| 11/13/2020 | 11/20/2020 |
| 11/27/2020 | 12/4/2020 |
| 12/11/2020 | 12/18/2020 |
| 12/24/2020 | 12/31/2020 |



Idaho Lifespan Respite Timesheet

Caregiver Name: _____

Caregiver Mailing Address: Check if the address has changed since last payment

| | | | |
|--|------|-------|-----|
| | City | State | Zip |
|--|------|-------|-----|

| BILLING MONTH/YEAR | DAY <small>(One day per line)</small> | List the number of hours after each date of service: | Amt charged per hour or day: | Total Amount per line: |
|----------------------|--|---|---------------------------------|---------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| TOTAL BILLED: | | | | |

Check if adding more dates on separate sheet.
 *I hereby certify by signing below that the above hours/dates are correct.

| | |
|-----------------------------|-------|
| Respite Provider Signature: | Date: |
| Caregiver Signature: | Date: |

| | |
|---|---|
| Submit completed document to Julie Torresani: Email: Julie.torresani@a3ssa.com Fax: (208) 855-2608 | Mail: Area Agency on Aging 701 S. Allen St., Suite 100 Meridian, ID 83642 |
|---|---|

| | |
|---|--|
| For office Use Only Amount Approved: Voucher #: Date Submitted to Billing: Coordinator Signature: Fund to Bill: Lifespan Title III | For office Use Only Billing Department Check #: Amount: Date Mailed: |
|---|--|

Fact Sheet #25: Home Health Care and the Companionship Services Exemption Under the Fair Labor Standards Act (FLSA)

This fact sheet provides general information concerning the application of the FLSA companionship services exemption in the home health care industry. The following information applies to the home health care industry until January 1, 2015. As of that date, revised regulations regarding the companionship services become effective. For information on the new regulations see Fact Sheet: Application of the Fair Labor Standards Act to Domestic Service: Final Rule. The following information applies to the home health care industry until the new regulations are in effect.

Characteristics

Employers who provide home health care services for individuals who (because of age or infirmity) are unable to care for themselves may or may not be required to pay minimum wage and/or overtime premium pay depending upon the type of services provided and the nature of the working relationship. Employees providing "companionship services" as defined by the FLSA need not be paid the minimum wage or overtime. Trained personnel such as nurses, whether registered or practical, are not exempt from minimum wage or overtime under the exemption for companions, but registered nurses may be exempt as professionals. Certified nurse aides and home health care aides may be considered exempt from the FLSA's wage requirements depending upon the nature of their work. Please see Fact Sheet #17N for additional information on nursing exemptions.

Requirements

Persons employed in domestic service in households are covered by the FLSA. Nurses, certified nurse aides, home health care aides, and other individuals providing home health care services fall within the term "domestic service employment."

An employee who performs companionship services in or about the private home of the person by whom he/she is employed is exempt from the FLSA's minimum wage and overtime requirements if all criteria of the exemption are met. "Companionship services" means services for the care, fellowship, and protection of persons who because of advanced age or physical or mental infirmity cannot care for themselves. Such services include household work for aged or infirm persons including meal preparation, bed making, clothes washing and other similar personal services. General household work is also included, as long as it does not exceed 20 percent of the total weekly hours worked by the companion. Where this 20 percent limitation is exceeded, the employee must be paid for all hours in compliance with the minimum wage and overtime requirements of the FLSA.

The term "companionship services" does not include services performed by trained personnel such as registered or practical nurses. Registered nurses are exempt from the FLSA's wage requirements where their time is spent in the performance of the duties of a nurse and are paid on a salary or a "fee basis" as defined by Regulations, 29 CFR Part 541.

Individuals other than trained personnel (such as nurses) who attend to invalid infants and young children are considered companions, rather than babysitters, and their status may thus be within the companion exemption.

Covered domestic service employees who reside in the household where they are employed are entitled to the minimum wage but may be exempt from the Act's overtime requirements.

Typical Problems

An employee hired as a companion to an aged individual with a physical infirmity spends more than 20 percent of his/her time doing general household work. That person must be paid at least the minimum wage and one and one-half the regular rate of pay for hours in excess of forty in a workweek.

An employee who provides care and protection for minor children, where the children are not physically or mentally infirm, must be paid the minimum wage and proper overtime compensation. This activity would not constitute exempt companionship services.

Where to Obtain Additional Information

For additional information, visit our Wage and Hour Division Website: <http://www.wagehour.dol.gov> and/or call our toll-free information and helpline, available 8 a.m. to 5 p.m. in your time zone, 1-866-4USWAGE (1-866-487-9243).

This publication is for general information and is not to be considered in the same light as official statements of position contained in the Department's regulations.

U.S. Department of Labor
Frances Perkins Building
200 Constitution Avenue, NW
Washington, DC 20210

1-866-4-USWAGE
TTY: 1-866-487-9243

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

| | | | |
|--|--|--|---|
| Print or type. See Specific Instructions on page 3. | 1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. | | |
| | 2 Business name/disregarded entity name, if different from above | | |
| | 3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. | | 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small> |
| | <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate | | |
| | <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. | | |
| | <input type="checkbox"/> Other (see instructions) ▶ _____ | | |
| | 5 Address (number, street, and apt. or suite no.) See instructions. | | Requester's name and address (optional) |
| 6 City, state, and ZIP code | | | |
| 7 List account number(s) here (optional) | | | |

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

| Social security number | | | | | | | | | | | |
|------------------------|--|--|--|---|--|--|---|--|--|--|--|
| | | | | | | | | | | | |
| | | | | - | | | - | | | | |

or

| Employer identification number | | | | | | | | | | |
|--------------------------------|--|--|--|---|--|--|--|--|--|--|
| | | | | | | | | | | |
| | | | | - | | | | | | |

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

| | | |
|------------------|----------------------------|--------|
| Sign Here | Signature of U.S. person ▶ | Date ▶ |
| | | |

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester.
2. You do not certify your TIN when required (see the instructions for Part II for details).
3. The IRS tells the requester that you furnished an incorrect TIN.
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

| IF the entity/person on line 1 is a(n) . . . | THEN check the box for . . . |
|--|---|
| • Corporation | Corporation |
| • Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes. | Individual/sole proprietor or single-member LLC |
| • LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes. | Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation) |
| • Partnership | Partnership |
| • Trust/estate | Trust/estate |

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

| IF the payment is for . . . | THEN the payment is exempt for . . . |
|--|---|
| Interest and dividend payments | All exempt payees except for 7 |
| Broker transactions | Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012. |
| Barter exchange transactions and patronage dividends | Exempt payees 1 through 4 |
| Payments over \$600 required to be reported and direct sales over \$5,000 ¹ | Generally, exempt payees 1 through 5 ² |
| Payments made in settlement of payment card or third party network transactions | Exempt payees 1 through 4 |

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

| For this type of account: | Give name and SSN of: |
|--|---|
| 1. Individual | The individual |
| 2. Two or more individuals (joint account) other than an account maintained by an FFI | The actual owner of the account or, if combined funds, the first individual on the account ¹ |
| 3. Two or more U.S. persons (joint account maintained by an FFI) | Each holder of the account |
| 4. Custodial account of a minor (Uniform Gift to Minors Act) | The minor ² |
| 5. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law | The grantor-trustee ¹ The actual owner ¹ |
| 6. Sole proprietorship or disregarded entity owned by an individual | The owner ³ |
| 7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A)) | The grantor ⁴ |
| For this type of account: | Give name and EIN of: |
| 8. Disregarded entity not owned by an individual | The owner |
| 9. A valid trust, estate, or pension trust | Legal entity ⁴ |
| 10. Corporation or LLC electing corporate status on Form 8832 or Form 2553 | The corporation |
| 11. Association, club, religious, charitable, educational, or other tax-exempt organization | The organization |
| 12. Partnership or multi-member LLC | The partnership |
| 13. A broker or registered nominee | The broker or nominee |

| For this type of account: | Give name and EIN of: |
|---|-----------------------|
| 14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments | The public entity |
| 15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B)) | The trust |

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

*Note: The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN.
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.



Tips on Hiring Respite Providers

When hiring your own respite provider, you are considered the actual employer. Below are some tips that could be useful.

Finding a Provider:

- Ask family and friends who have used respite care providers.
- Friends and neighbors may be interested or know someone who is.
- Contact churches, social service agencies, community health centers, senior centers, nursing homes or assisted living facilities.
- Post a flyer at family or disability-related organizations, school or doctor's offices.
- Place an ad in the Help Wanted section of your local newspaper, on Craig's list, etc.

Hiring a Provider

- You will need to find a respite provider, interview them, and train them.
- As the caregiver you will negotiate a rate of pay.
- Provide a job description and explain the disability of your loved one.
- Ask for references and a background check if desired (forms may be found at the local police station).
- You will need a backup plan in case the provider gets sick or doesn't show up.
- As the caregiver you determine the schedule.
- You will be liable if they are hurt while providing care.

Training a Provider:

- Meet with the provider and your loved one to see how they get along.
- Show them how to care for your loved one.
- Give them step-by-step instructions for any special care that is needed.
- Be specific about what is NOT allowed around your loved one.
- Make sure they know what to do in case of an emergency.

Terminating a Respite Worker

- It may be necessary to dismiss a respite provider. If so state your reasons clearly.
- Do not withhold payment for services for any reason. If dissatisfied, simply dismiss and pay the respite provider.



Hiring Respite Care Providers

A Handbook for Accessing and Using Services

Relationship Roles

Defining the Relationship

When hiring a respite care provider, it is important to define the relationship roles. Defining the relationship means knowing the responsibilities of the provider and the respite care recipient. As the one purchasing to provide the respite care services, YOU are the manager! The relationship may be one of friendship or a family member, but first, the relationship must be viewed as that of a manager-assistant or employer-employee if the provider is to give quality respite care services the way you want them done. If the responsibilities are not clearly defined, problems will arise. It is not a matter of if, but when problems will surface.

Setting the Boundaries

As a part of defining the relationship between the provider and caregiver, it is important to set the boundaries of the relationship. Think of boundaries as limits and determine what your limits will be. Do you want strictly a business relationship? Friendship? It may be impossible for the relationship NOT to have the characteristics of both, but it is important to know that the business relationship needs to be primary. Most problems occur when the role of each person is unclear or when the roles change.

A part of setting the boundaries is dealing with the issue of control. Control is an issue in almost all relationships and is generally defined as managing, overseeing, or being in charge. The caregiver is the manager and must have primary control over the services provided by the respite provider. Control is NOT domination. Control involves managing and overseeing in order to accomplish a goal.

Important to note is that the person in control of a situation must first be able to control his or her own thoughts, feelings, and emotions. Also important is the need for the person in charge to respond appropriately to situations. Every individual has the right to be treated with courtesy in a humane, dignified manner and be treated with courtesy. The caregiver is responsible for sharing with the provider their specific expectations with regard to respite care.

Burnout

Keep in mind that the job of a respite care provider is not easy and can be quite stressful. Burnout prevention is crucial, and the following tips may help prevent burnout and keep you from having to recruit, hire, and train new respite providers too often.

- ♣ Since most providers are naturally more nurturing and take on the concerns of others more readily, encouraging your provider to take plenty of time for themselves.
- ♣ Try to include some variety in your provider's work and be as flexible as possible within limits. This may include the provider taking the loved one out of the house for a walk or some other activity both may enjoy.
- ♣ Have backup providers and use them if necessary.
- ♣ Communicate often with your provider. Good communication between the caregiver and provider cannot be overemphasized. Doing so will enable both of you to maintain a good working relationship.

Yes, You Need a Job Description

In order to manage a provider, you will need to look closely at the ways you perform the daily living activities for your loved one. If you do this, you will be able to start building a realistic picture of what you need a provider to help you do while you take a break. This assessment of your needs will help you locate the right person for the job. Your likes/dislikes and requirements for a provider will help you put together a job description suitable to meet your needs.

Reasons you need to create a job description:

- ♣ The process of creating a job description will help you develop a realistic view of your needs and a basis for interviewing applicants.
- ♣ A job description will help keep the interview focused on the job duties.
- ♣ A job description provides a potential provider with clear ideas about what your requirements for the job entail.
- ♣ After the provider is employed, the job description can be used as a checklist of duties and responsibilities.
- ♣ A job description can be a valuable tool in providing feedback for the provider when you wish to evaluate the provider's work performance.
- ♣ Your expectations can be clarified and remain in focus if based on a job description.
- ♣ A job description can help settle disagreements regarding job duties and responsibilities.

Sample Job Description

Job Title: Respite Care

Provider Primary Function: To allow the caregiver of a person with a disability or chronic illness time to take a temporary, short-term break from their duties as primary caregiver (The respite provider may perform activities of daily living according to the personal needs of the individual.)

Supervision: Works under the direct supervision of the caregiver

Education: High School graduate or GED Certified nursing assistant or similar training program is preferred, but not required.

Experience: Current work experience with individuals who have disabilities preferred

Skills:

Effective written and oral communication skills

Ability to maintain a confidential working relationship

Good personal skills

Ability to consistently be at work on time

Ability to follow oral and written instructions

Knowledge: Working knowledge of signs and symptoms of common illnesses and conditions Working knowledge of how to apply first aid, safety and emergency procedures

Job Duties: (possible choices)

Assist with bathing and/or toileting activities

Assist with grooming/dressing activities

Assist with transfers and mobility activities

Assist with transportation activities

Assist with household chores

Assist with medications as directed

Provide basic first aid and safety procedures

Prepare food/assist with feeding

Terms of Employment: Part-time

Performance Evaluation: Performance will be evaluated by the caregiver.

Agreement Contract:

An agreement between the caregiver and the provider is important as a means to formalize the relationship and clearly indicate the responsibilities of each. The agreement should be flexible, but it should also contain the main responsibilities of the respite care provider as well as the caregiver. As the duties of the provider change, the agreement should be updated. Reviewing the agreement every six months or at least annually is good practice. The following is a sample agreement and other factors should be added or clarified according to personal need.

Sample Agreement:

It is understood that the Respite Provider will carry out the duties and responsibilities listed in the job description while performing respite services.

Both the Respite Provider and the Caregiver will treat each other with mutual respect. Both will attempt to be flexible and work to solve problems as they arise.

The Respite Provider agrees to work for the following amount: _____ per hour.

If the Respite Provider must cancel a respite service, as much notice as possible will be given to the Caregiver. Also, if the Caregiver must cancel a respite care service, as much notice as possible will be given to the Provider.

Signature of Respite Provider:

Signature of Caregiver:

Date:

Review Date and Initials:

Telephone Screening of Applicants

Screening potential providers is helpful. Telephone screening can save time for both you and the applicant. In the telephone screening, you should:

- ♣ Discuss important points about the job
 - ♣ Find out information about the applicant
 - ♣ Get a first impression of the person
- Tips for Screening:
- ♣ Always trust your instincts and your "gut" reaction.
 - ♣ Be friendly and pleasant.
 - ♣ Check to see if the person has reliable transportation and if getting to work on time will be a problem. If the applicant has a long commute, you will want assurance that it will not interfere with the job.
 - ♣ Make sure you let the applicant know that you will need to do a criminal background check.
 - ♣ Discuss money and hours. If the applicant is not able to accept the hours or the pay, now is the time to find out. There is no need to interview someone who already finds the job unacceptable.
 - ♣ Give a brief description of the job duties, if the pay and hours are already determined to be acceptable.
 - ♣ Set up a time to conduct a formal interview in person. Give directions and your address only to those you choose to interview. Consider using a location other than your home for the initial interview.

Interview Strategies

You are interviewing a stranger, so use some common sense in setting up the face-to-face interview. Consider using a place other than your home for the interview. Prior to the interview, consider the personal qualities you feel are important in a respite provider. Keep in mind your feelings about:

- ♣ Trustworthiness
 - ♣ Honesty
 - ♣ Sense of humor
 - ♣ Good attitude
 - ♣ Common interests
 - ♣ Dependability
 - ♣ Ability to follow directions
 - ♣ Good communication skills
- Tips for Interviewing:
- ♣ Try to make the situation as comfortable as possible.
 - ♣ Explain the disability of your loved one to the extent that makes you comfortable.
 - ♣ Provide a job description.
 - ♣ Ask about jobs the person currently has or has had in the past including the tasks performed, how the applicant felt about those tasks (likes/dislikes), and if the person is currently working.
 - ♣ Ask for at least two work references.
 - ♣ Explain how you will evaluate job performance.
 - ♣ Take notes as you interview.
 - ♣ Be cautious about hiring someone on the spot. Be sure to check the references first! Keep in mind as you check references that just as employers are limited in what they can ask a job applicant, they are also limited in what they can reveal about current or former employees without written permission. The only information you can legally obtain from a former employer will be the date the person began work, the date they left employment, and whether or not the person is eligible to be rehired. But check those references, no matter what. You will be surprised what the voice can tell you regardless of the words.

Possible Interview Questions

The following sample questions may be helpful. These questions are designed to help you learn more about the applicant and his/her lifestyle and personal habits. The questions are only as a guideline.

Food and Eating Arrangements:

- ♣ Are you a good cook?
- ♣ Do you have any special training for assisting with feeding?
- ♣ Explain to the applicant what the rules will be regarding their eating at your home.

Transportation:

- ♣ Can you drive or can you assist in using public transportation to go somewhere with my loved one?
- ♣ Do you have a valid driver's license and insurance?

Housekeeping (most respite providers do not have housekeeping responsibilities):

- ♣ Would you be willing to do minor housekeeping chores while providing respite?

Explain what those may be; i.e. clean up kitchen after eating.

- ♣ Do you like things very neat or are you not particular?

Personal Needs:

- ♣ Do you smoke?
- ♣ Will you stay overnight during a respite service?
- ♣ Do you prefer activities to be planned in advance or do you like spur of the moment? (Ask if you wish the respite provider to share in entertainment activities.)
- ♣ Do you have any hobbies?
- ♣ Do you consider yourself a flexible person? Can you give examples?
- ♣ How do you react to a change in plans at the last minute?
 - ♣ If your loved one needs assistance with eating, mobility, toileting, etc., ask about any qualifications or training specific to need, or the applicant's willingness to participate in these daily living activities.
- ♣ If your loved one likes to be read to, ask if the applicant is able to read printed text.
- ♣ If you have a pet, ask if the person is allergic or has some other issues with pets.

About the Background Check

Make sure that the person you are interviewing understands your need to conduct a criminal background check. You must have permission of the person who is a possible candidate to do a background check. Consent forms are designed specifically for this and may be obtained through your local police department or Department of Human Resources. The cost of doing a background search varies depending on who does the search and how extensive it is. A word to the wise – do not send the applicant to pick up the results!!!!

How to Locate a Respite Provider

Be creative and you will find there are many ways to locate potential respite care providers. There are a variety of ways to advertise if the limited registry of respite providers in your area does not meet your needs. Other ways to locate a provider:

- ♣ Word of mouth
- ♣ Agencies
- ♣ Local newspapers (learn about writing an advertisement in another section of this booklet)
- ♣ Local newsletters – support groups or disability group newsletters
- ♣ Social Service agencies
- ♣ Health Care agencies
- ♣ Job services or employment offices
- ♣ Financial aid offices at colleges, universities, technical schools or similar places
- ♣ Rehabilitation centers
- ♣ Hospital or university nursing, social work, education, vocational schools
- ♣ Nursing homes or assisted living facilities
- ♣ Churches or faith-based organizations

Writing an Advertisement for a Provider

When it comes to composing an advertisement to hire your provider, keep in mind that there is no right or wrong way to do it. Keep your specific needs in mind. Consider including any of the following that apply to your situation:

- ♣ Who – are you looking for?
- ♣ What – do you want them to do for you?
- ♣ When – will you need their services?
- ♣ Where – will they provide the respite care services?
- ♣ Pay – how much are you going to offer?
- ♣ Amount of training needed for the job
 - ♣ A contact person's name
 - ♣ Phone number to call
 - ♣ Preferred time to call
- ♣ How much time will you need their services?
- ♣ Preference for male or female provider
- ♣ Smoker or nonsmoker preferred
- ♣ Do they have their own transportation?

Remember that you want your advertisement to attract the attention of the potential respite provider, so what is it about your advertisement that would make someone want to respond? You may want to stress something positive about the job as a heading. Make the advertisement direct, clear, short, and easy to understand. Use descriptive words such as dependable, reliable and punctual. Check with your local newspaper to find out the best days to run an advertisement like yours, but in general weekends and Wednesdays are best.

Creating a Good Work Environment

Respite work generally does not pay well and offers few if any benefits. Those who choose to work as a provider often take the job for other rewards such as personal satisfaction or a chance to work with people with disabilities or chronic illnesses while helping out caregivers. The work environment is one of the most important factors in keeping a provider. You should do what you can to create a work environment that will bring out the best in your provider. Maintaining a positive attitude and being satisfied with his/her work is essential for the provider to continue helping you with respite services. Good communication between you and your provider will enable both of you to get along better and be happier with the arrangement.

- ♣ Offer praise for good/correct performance. Many individuals will work just as hard for praise, and it is just as important as what you are able to pay your provider. Everyone wants to feel appreciated, needed and valued.
- ♣ When it is necessary to point out that you are displeased with something that your respite provider has done, it is important to remember to be open, honest, and criticize the action, not the individual.
- ♣ Don't let small irritations build up until an angry outburst occurs. Anger that is vented after building up is often expressed in destructive ways. Always make a point of discussing something that irritates you as soon as possible. Confrontation is not pleasant – just necessary.
- ♣ Respect your provider. Remember that your provider is a human being and would like to be treated in an honest, kind, respectful and patient manner – the same way you would like to be treated.
- ♣ Talk to your provider and be open about making changes in the job description or compromise to alleviate a problem.
- ♣ Terminate the agreement if the relationship is not working out. There are good ways and bad ways to accomplish this task if necessary.
- ♣ Keep your working relationship separate from your personal life.
- ♣ You have the opportunity to provide a positive work environment for your provider as well as yourself and your loved one. Remember that good communication with your provider is the key to a good relationship. When everyone is happy, providers will stay with you longer and do a better job for you – a mutual benefit for both.

How to Give Praise and Feedback to your Respite Provider

- ♣ Always be sincere and don't say something you don't really mean.
- ♣ Give compliments often for good work performance.

Two-Step Compliment

- ♣ Describe the situation or event that you like.
- ♣ Tell what your feeling was when it happened, and say you appreciate it, or say "thank you."

Giving Constructive Criticism

- ♣ Use criticism as a tool for sharing information with your provider.
- ♣ Remember that the whole idea is to help you take a break from full-time caregiving responsibilities, and you want them to perform to your expectations and continue providing respite for your benefit.

Three-Step Correction

- ♣ First, describe the situation or event you disliked.
- ♣ Second, tell what your feeling was when it happened.
- ♣ Third, state how you would like it handled the next time.

Suggestions for Giving Correction

- ♣ Give the feedback as soon as possible after the situation you dislike occurs.
- ♣ Discuss only one incident at a time.
- ♣ Do not bring up things from the past.
- ♣ Talk only about the present, no matter how great the temptation to do otherwise.
- ♣ Focus on the person's actions, not the person.
- ♣ Keep the discussion brief and to the point.
- ♣ Don't exaggerate or become emotional.
- ♣ Be aware of your tone of voice. Only 30% of messages you send are sent with words. Your body language does the rest, and that includes your tone of voice and inflection. The way you speak will affect the way your provider reacts.

Training your Respite Provider

The amount and type of training you will need to give your provider will depend on the specific needs of your loved one. Training a provider is based on your needs and will reduce confusion later.

Checklist for Training your Respite Provider

- ♣ Begin by explaining the disability or illness of your loved one in as much detail as you feel is necessary for your provider to understand what your needs will be in regard to providing the respite service.
- ♣ Explain any technical words you might use and be as specific as possible.
- ♣ Emphasize anything related to safety or emergencies. If there is a procedure other than to call 911, make sure your provider knows and understands how to utilize it appropriately.
- ♣ Give step by step instructions for any procedures your provider will be asked to help your loved one do, for example, eating or transferring. Emphasize the importance of doing the procedure in a certain way.
- ♣ Never assume that your provider knows exactly what you mean. Whenever you explain a procedure, be sure to have the provider explain it to you in his/her own words so that you know the instructions are understood.
- ♣ Be patient. Give the provider time to learn the routine. No matter how many respite workers you have had in the past, it will be different with each one.
- ♣ Try to put yourself in your provider's place, and be aware of your provider's feelings as you train.
- ♣ Utilize the services of others to help with the training process. Family members or former providers can be a great help training a new provider.
- ♣ Do not correct or confront your provider in front of others. Your public behavior reflects your effectiveness as a manager.
- ♣ When it is necessary to dismiss a provider, state your reasons clearly without verbally attacking the provider.
- ♣ It is illegal to hold payment for services for any reason for a service that has been provided, no matter how dissatisfied you were with the service. Simply dismiss and pay the respite provider.

Terminating an Employee

- ♣ If you do have to let someone go, do it in person, never by text, email or over the phone.
- ♣ Set up a time to discuss the matter, and find out the true reason for why a respite worker does not want to provide a service any longer if possible.
- ♣ If there is a legal challenge by either party, you may need to consult legal services prior to the meeting.
- ♣ Remember to document the conversation in writing for your records, putting the date, time, location and pertinent details of the event.

Finding the right respite provider for your family will ensure that your caregiving journey is successful. Once trust is built up with your respite provider, you will be able to take a break, relax and come back to caring for your loved one with the patience and love you know your care recipient deserves.

Again, all of the information in this handbook is provided for informational purposes only and does not encompass all available information on hiring a respite provider but, Idaho Lifespan Respite believes it is a good starting point. For answers to complex legal questions, users should consult a qualified attorney. For answers to complex or specific medical questions, users should contact a qualified doctor.



MAKING THE MOST OF RESPITE

You are important to your family.
Be good to yourself. Enjoy your respite time.

MAKING THE MOST OF YOUR DOLLARS

Do you have limited dollars to pay for respite? Think about stretching your available dollars by taking tips from other families:

1) Use friends, neighbors, and family to provide care. Build a "circle of support."

Many times these individuals are very willing to help, and are not usually doing it for the dollars. Don't forget your faith-based community or other social groups you might be part of. These groups can also be a source for additional support. Of course, having others help must be balanced with not taking advantage of their kindness.

2) Swap time with another family caregiver.

Sometimes it's possible to find another family who also is providing care to a family member. They might be willing to provide you with a break, and you in turn can provide them with a break at some other time. If you are in a support group or know another family in similar circumstances, check with them to see if they are interested in this type of arrangement.

MAKING THE MOST OF YOUR RESPITE EXPERIENCE

Your time away from caregiving will not automatically be restful and relaxing. Here are some thoughts about how to make the most of the time you have.

3) Plan ahead.

Think not only of who will provide the respite care, but what you will do during the free time you have. If you don't plan, you may find yourself doing errands and other activities that are really not as refreshing as reading a book, meeting a friend, or spending time with another family member.

4) Try to do something you enjoy.

Sometimes family caregivers find themselves doing chores, or other necessary activities rather than making it a personal time for refreshment. Don't feel guilty about doing something that you like to do!!

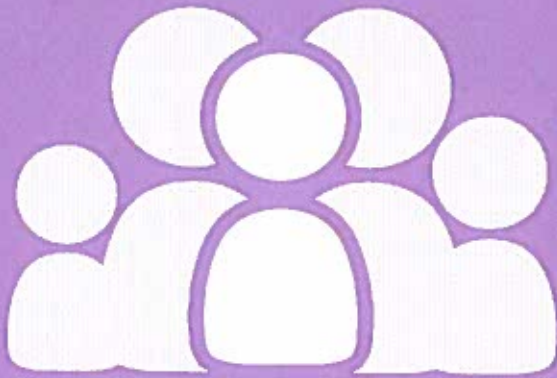
5) Plan to use respite on a regular basis and with enough time so that what you do is meaningful.

While some caregivers use all their dollars at one time, it is often better to use them in smaller amounts – maybe every 2 weeks for 2 to 3 hours. Using respite on a regular basis helps you stay more rested and relaxed. It's like taking medicine – the doctor wants you to take it on a regular basis and in the right dosage!!

6) Use respite along with other services.

To make respite effective, you may need other services that help to support your family. These supports can include caregiver education, transportation, counseling, and direct services for the person you are caring for. Although your respite dollars cannot pay for these services, we certainly can try to help you get to agencies that can either help you find these services or provide them.

Charting the LifeCourse



Respite: Short Breaks for Caregivers

Being a caregiver can be one of the most rewarding and most challenging times we face. In order to continue to care for family members who require additional support, we must remember to care for ourselves as well.

This guide is meant to help caregivers and those who support them to understand the meaning and importance of respite/short breaks, see real life examples, understand the possibilities and options that exist for respite, within and outside the formal, paid service system, and create a successful plan that uses these short breaks to enhance the lives of all family members.

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LIFE DOMAIN



ALL Life Domains

LIFE STAGE



ALL Stages

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Charting the LifeCourse: Respite

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RESPITE GUIDE

What is it and who is it for?



About the Guide

This guide is one in a series of Charting the LifeCourse guides developed by and for families and professionals who interact with and support families. These guides include information and tools for planning a quality and meaningful life for all family members, especially among families that include a member who requires additional support to live in their community and to reach their good life. To find out more about how these guides are developed and the topics currently addressed, please visit lifecoursetools.com.

The *Charting the LifeCourse: Respite Guide* and accompanying toolkit are intended for anyone in a family or relationship that is providing the majority of care or support to a person who needs additional support, and are also referred to as “caregivers” or “carers” throughout this guide. It is focused on the topic of respite, or short breaks for caregivers. The purpose of this guide is to provide:

- information on the importance of respite for the well-being of a caregiver and of finding the right fit for all family members;
- tools for thinking about and planning respite; and
- additional resources for finding respite outside the formal paid service system in the community or from other family members and friends.

In this document, caregiver refers to the more commonly used term “family caregiver”. Family caregivers include family members, neighbors, or friends who provide informal care to children or adults with one or more special needs, including, but not limited to, chronic mental, neurological or physical health conditions, cognitive, intellectual or other developmental disabilities or delays; physical disabilities, and functional limitations. “Care receivers” refer to children and adults with one or more special needs who are cared for by caregivers. This guide interchangeably uses the terms “care recipient,” “loved one,” and “person receiving/needing care.”

This guide provides the questions to ask or think about, and strategies to get the answers and move closer to the desired result. It is meant to be used as a way for families to start conversations as they begin to think about and plan for respite.

CONTENTS

1. GETTING STARTED
2. EXPLORING
3. PLANNING
4. NEXT STEPS
5. RESOURCES

RESPIRE

What is it and why is it important?



What is it?

Respite is planned or emergency care provided to a child or adult with special needs in order to provide temporary relief to, or a short break for, family caregivers who are caring for that child or adult (archrespite.org).

Traditionally, the word “respite” has been used to describe a paid service provided outside the family home, often in a formal care facility setting, community-based respite program, or in-home care using paid professionals or other individuals. As we continue to learn about the many benefits of respite for families, we are also learning that it matters where and how these short breaks are spent for both the individual receiving support, their caregiver and family. As a result, there are a growing number of respite options and resources outside the traditional paid options, including supports in the family home, local community options, and resources for identifying people and places caregivers already know and trust who can provide breaks as well as meaningful interactions and experiences for the care recipient.

Why is respite important?

Caring for a loved one can be very rewarding, but can also be stressful, and even overwhelming at times, due to a lack of balance. Everyone needs time to do the things they need to do, like go grocery shopping or to an appointment. However, it is also important to make time to do the things you want to do and that are meaningful to you and your family, such as hobbies or activities with friends. For many families, especially those with loved ones who require intensive care, it can be difficult to think about spending time apart from one another. As a caregiver, entrusting the care of your loved one to someone else can cause feelings of anxiety, and for the individual requiring support, the very thought of going somewhere new, without their typical caregiver, can be unsettling. They may refuse to participate in any discussion about the subject. However, recognizing the importance of short breaks for everyone can provide many positive benefits for all family members.

Caregivers, and their families, who do not take regular and sufficient amounts of respite time to do the things they want and need to do, often experience greater stress, which can take a toll on their mental and physical health. Importantly, research shows that respite which is personalized and purposely planned, benefits not only caregivers, but all family members, including siblings or a spouse or partner.

Some benefits of taking short breaks include^{1,2,3,4}:



FAMILY UNIT

- More time spent together
- Improved relationship quality with other children, spouse or partner
- Improved relationship with, and better able to relate to, the care recipient
- Ability to live 'a more ordinary life'



CAREGIVER

- Have time for everyday activities, like sleeping or running errands, and for taking care of own health
- More time to spend with other family members, such as a spouse or partner or children
- Freedom to do something for themselves, like visit friends or read a book
- Better overall physical and emotional health
- Reduced stress, exhaustion and anxiety
- Feeling a 'sense of renewal' or relief



CARE RECIPIENT

- Meaningful, and potentially new, experiences
- Greater independence by spending time away from the caregiver
- Socialization and keeping active (depending on activities during respite time)
- Improved interactions with caregiver (because caregiver is less stressed)
- Increased happiness and self-esteem
- Improved physical and mental health

1 Harper, A., Dyches, T. T., Harper, J., Roper, S. O., & South, M. (2013). Respite care, marital quality, and stress in parents of children with autism spectrum disorders. *Journal of autism and developmental disorders*, 43(11), 2604-2616.

2 Neville, C., Beattie, E., Fielding, E., & MacAndrew, M. (2015). Literature review: use of respite by carers of people with dementia. *Health & social care in the community*, 23(1), 51-63.

3 Robertson, J., Hatton, C., Wells, E., Collins, M., Langer, S., Welch, V., & Emerson, E. (2011). The impacts of short break provision on families with a disabled child: an international literature review. *Health & social care in the community*, 19(4), 337-371.

4 Theis, S. L., Moss, J. H., & Pearson, M. A. (1994). Respite for caregivers: An evaluation study. *Journal of Community Health Nursing*, 11(1), 31-44.

EXPLORING RESPITE

What are the possibilities?

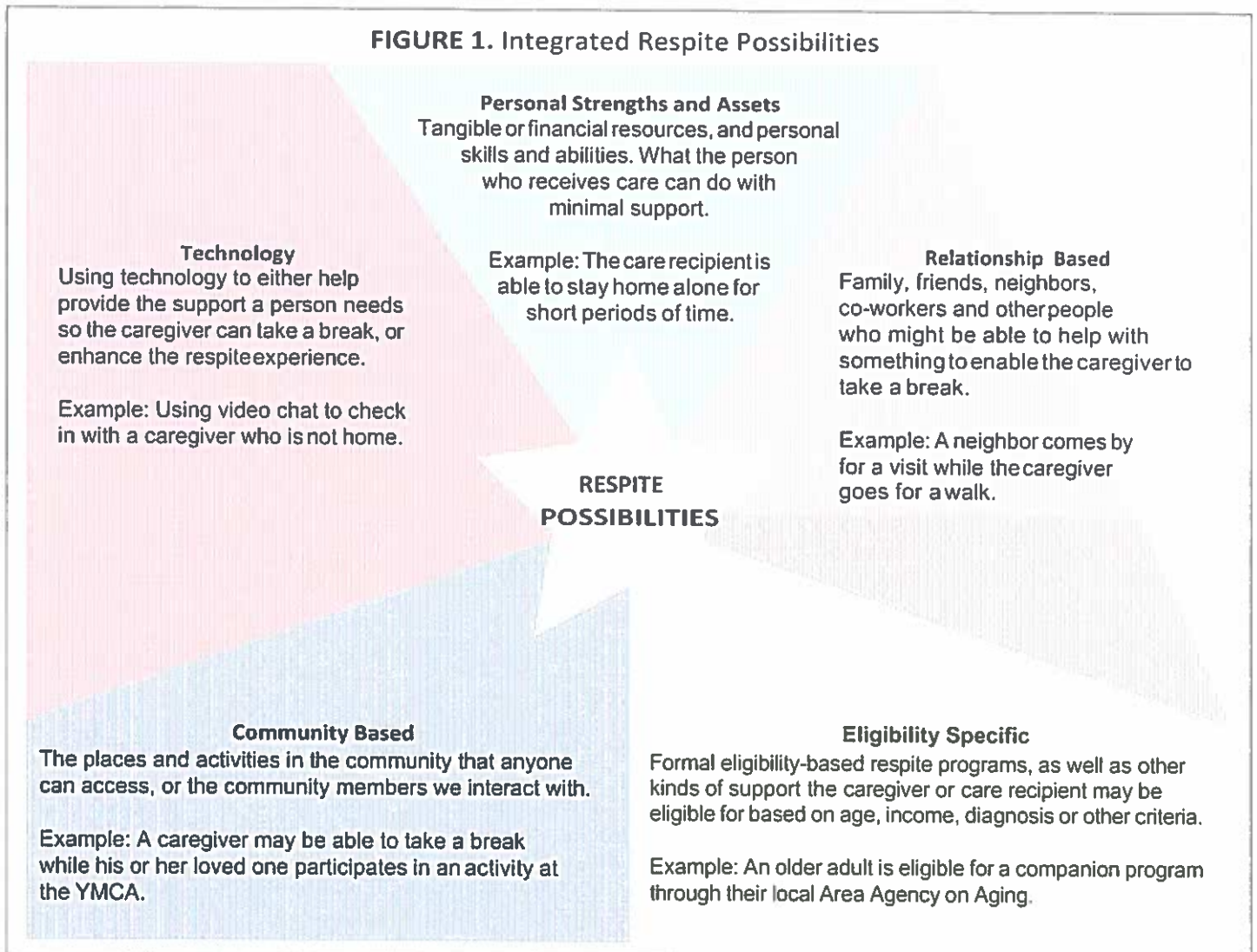


Everyone uses a variety of resources and supports to get through their day-to-day routine. People build on their own strengths, assets, skills and capabilities. Some people have friends or family in their lives that do things for them (and vice versa). Community groups, clubs, organizations or resources can also be a source of support, and who doesn't use technology these days?

When someone in the family has different abilities or support needs, the caregiver may be able to access formal government services, such as paid respite. Sometimes, caregivers are told to use natural supports, but it's hard to know what that means. It is important to consider all of the various sources of support anyone else might use, and how they may be adapted to your unique situation. There are often ways for a caregiver to get respite (a short break) even when paid supports or traditional funding sources are limited or not available. Even if formal respite services are available and being accessed, these services can be enhanced or maximized by incorporating other types of support along with them. By not relying solely on paid formal supports, if something should happen that those paid services are no longer available or are limited, the caregiver will still have options for taking a respite break.

The Integrated Supports Star for Respite, pictured below, is a visual way to help you think differently about support options for respite, and to understand the different elements of the Star. Later in this guide, (pages 8-9) you will use the Star to think about your own respite needs and resources.

FIGURE 1. Integrated Respite Possibilities



PLANNING RESPITE

What is a portfolio?



As caregivers, it is easy to become so focused on the person needing care, that we lose sight of our own wants, needs and identity, as well as that of other family members. We can begin to experience anxiety or guilt at the very thought of entrusting the care of our loved one to another individual or organization.

It is important for caregivers and their families to make a plan to incorporate respite into their lives long before exhaustion, isolation and feelings of being overwhelmed have set in. Advanced planning also allows for respite to be customized to meet the unique needs of the family members and provide enjoyable and meaningful experiences for everyone.

My LifeCourse Respite Portfolio

The LifeCourse Respite Portfolio is a set of tools to help you make a plan for respite. In the next few pages, we will take you step-by-step through filling out your own LifeCourse Respite Portfolio. Each section of the Portfolio is identified by headers in bold. The headers correspond with the section in the guide containing directions for that part of the Portfolio, as well as examples to help get you started. Below are images of the tools you will need. All Charting the LifeCourse Respite materials can be downloaded, free of charge, at lifecoursetools.com.

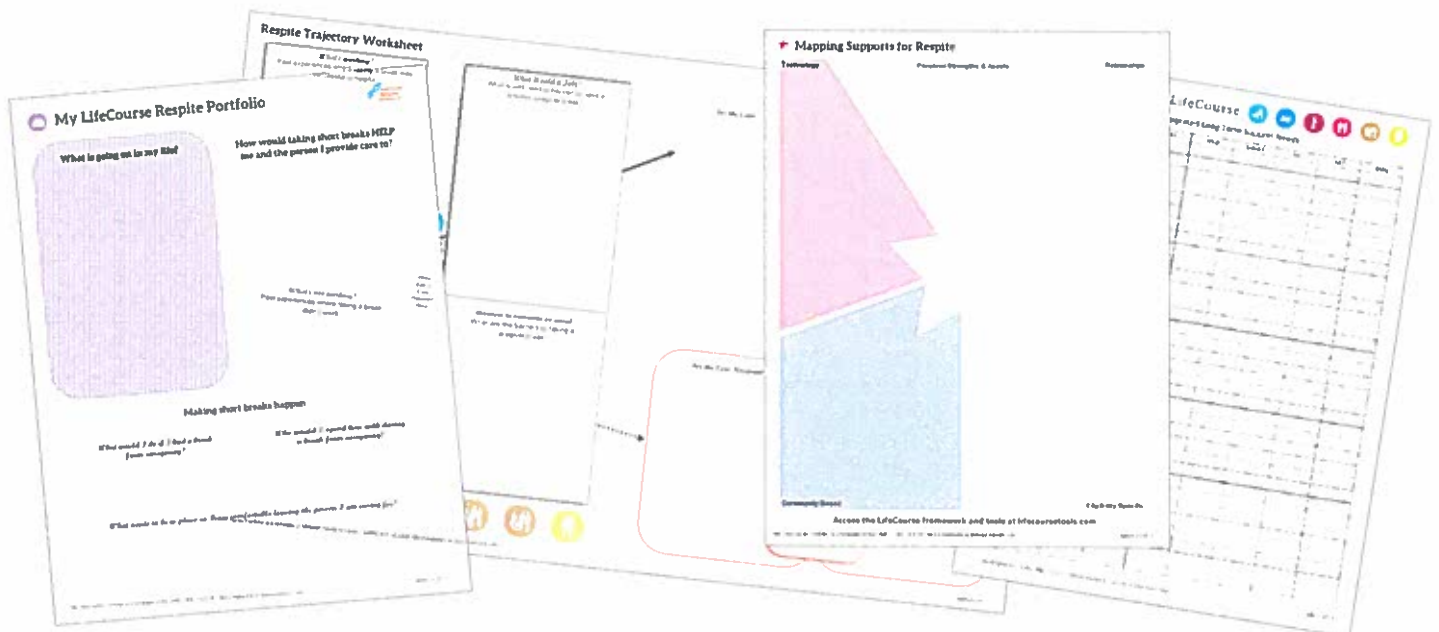
The LifeCourse Respite Portfolio is designed to lead you through planning for respite by:

- helping you explore the need for and benefits of respite for you, your loved one, and your family,
- leading you through the development of a plan that balances the support needs of your loved one with those of the family or caregiver,
- helping you identify specific opportunities or times for respite that can fit into your schedule, and
- assisting you in exploring strategies and resources available to you for respite within and outside the formal paid system.

Once completed, this portfolio can be used to:

- problem solve with professionals on how to meet the needs of the person receiving care, the caregiver and family members during formal planning meetings,
- train or coach staff providing respite, in or out of the home,
- plan or coordinate logistics of day-to-day activities,
- and help others in the community understand how to support your loved one while they are receiving care or participating in a community activity.

Download your own LifeCourse Respite Portfolio at lifecoursetools.com/respite



PLANNING RESPITE

What's going on now?



Having a clear picture of your current situation can help you know where you are starting, how using respite could improve your life, think about what you would do with a short break, and identify what needs to change.

To begin, you will need the blank LifeCourse Respite portfolio that came with this guide or you downloaded at lifecoursetools.com/respites.

The first page of the portfolio is designed to provide a snapshot of your current situation related to respite as well as help you identify the benefits of respite to you, your loved one and other members of your family, if you are able to take a break from your caregiver role while your loved one is in trusted care. Take a few moments to reflect or even have honest conversations with other family members about the impact of caregiving and consider your own needs as well as those of others in your family. Try to let go of any guilt and think factually about your unique situation.

What is going on in my life?

List some of the ways that caregiving impacts you, your loved one, and your family as a whole. Think about factors that are unique to your situation.

Examples: loved one requires 24/7 care; being sole caregiver; juggling care-giving with full time job; lack of sleep; caregiver health issues.

How would taking short breaks HELP me and the person I provide care to?

List some of the SPECIFIC benefits to you, your loved one, and your family.

Examples: relieve stress; improve caregiver mental health; improve relationship of caregiver and loved one; caregiver keeping their job.

Making Short Breaks Happen

What would I do if I had a break from caregiving?

List ideas of places you might want to go, activities in which you'd like to participate, or hobbies you might pursue.

Examples: attend faith or other community events; host sleepovers or family events; take a yoga class.

Who would I spend time with during a break from caregiving?

Think about who you would like to spend time with if you had respite from caregiving.

Examples: reconnect with family or friends; make a new friend; have some alone time.

What needs to be in place so I am comfortable leaving the person I am caring for?

List some of the conditions/specific supports that you and your loved one feel are necessary to feel comfortable being apart and truly enjoying a short break from caregiving.

Examples: specific training needed; unique care needs; preferred way of being supported.

PLANNING RESPITE

What is our vision?

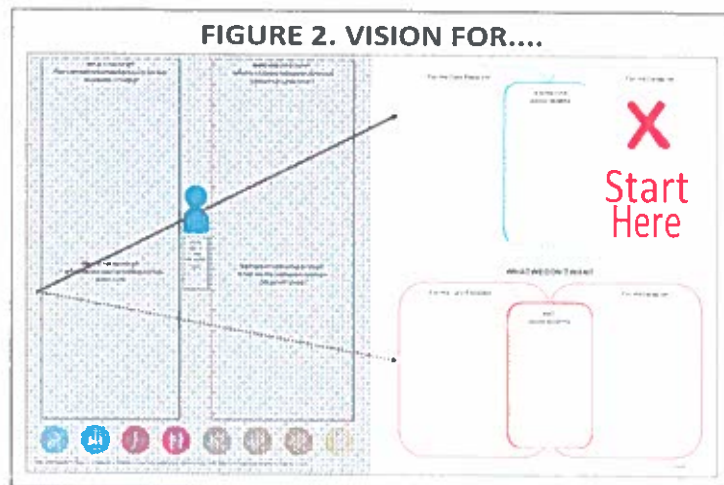


Respite Trajectory Worksheet

Good respite planning starts with a clear vision for a good life and for a good respite experience. Having a vision of what good respite looks like for you and your loved one, and keeping that vision in mind, can help guide you as you make decisions about whether choices or experiences draw you closer to that vision or further away.

Exploring your vision could mean thinking well into the future or focusing on the here and now. Identifying a vision will help you have a target to aim for, as well as a way to communicate with others what you want good respite to look like. Most caregivers will only take a break if they are sure their loved one is happy, safe, and well cared for in their absence.

The Respite Trajectory Worksheet is located on the inside of your LifeCourse Respite Portfolio. You will begin this exercise on the right-hand side of your Respite Trajectory Worksheet. You will begin by identifying an "overall" good life for both you (the caregiver) and the person receiving care, as well as what you both don't want in life. This will help you keep in mind a target for your lives, and avoid pitfalls that might take you in an undesirable direction.



CARE RECIPIENT

Vision for a Good Life

Ask the person receiving care (if possible) to define their good life and LIST in this section. It could be similar or different than what you identify. What makes them happy or puts a smile on their face?

Example: friends, family, a favorite item or food

CAREGIVER

Vision for a Good Life

LIST what needs to be present or happening to make a good life for YOU, the caregiver. You can think long or short term.

Examples: friends, family, fun, good job, or having enough money to do the things you like

RESPITE

VISION FOR GOOD RESPITE

LIST what makes a good respite experience for both you and your loved one. What needs to be happening or in place so you can both relax and have a positive experience?

Examples: Respite providers trained in CPR/first aid, care recipient does enjoyable activity

Note: Sometimes it is easier to know what you want by FIRST identifying "What We Don't Want" below.

What We Don't Want

LIST outcomes or experiences that your loved one wishes to avoid or would make their life "not good" in this section.

Examples: being bored, loneliness, no money

What We Don't Want

List what would make your life not so good. What do you want to avoid or prevent?

Examples: poverty, poor health, or loss of job.

WHAT IS NOT GOOD RESPITE

LIST things that would make respite a negative experience for either the caregiver and/or care recipient.

Examples: care recipient is frightened, caregiver worries the entire time

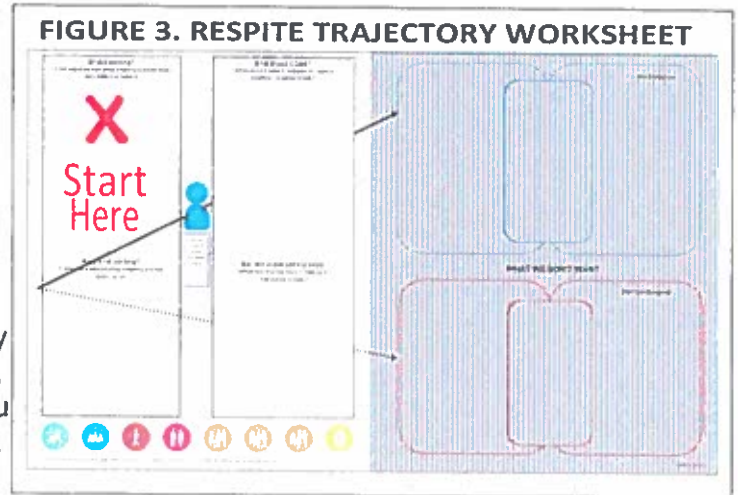
PLANNING RESPITE

What is our trajectory?



Trajectory

The 'trajectory' is the path in life that will either lead you toward your good life or push you toward what you don't want. Life experiences and events affect the trajectory. Some experiences help move the trajectory toward the desired good life outcomes. Others might move the trajectory toward unwanted results. It's important to reflect on past life experiences, both positive and negative, to know what to continue or build upon, and what to avoid or stop doing. With every choice, decision, experience, or interaction with others, consider which direction it nudges the trajectory. You will need your Respite Trajectory Worksheet (pictured).



Planning is beneficial at any age. First, on your Respite Trajectory Worksheet, write your loved one's current age or the date in the box under the icon of the blue person.

Past Experiences

What's working?

Reflecting on past experiences that were positive can help you to know what worked well and plan more positive experiences in the future. LIST times you felt comfortable taking a break, things that resulted in a positive respite experience, or situations where your loved one was successfully supported by someone other than you, the caregiver.

What's not working?

It is also important to acknowledge past barriers to good respite or what has moved you or your loved one toward unwanted results. By knowing what didn't work in the past, you can identify situations to avoid. LIST past negative experiences, situations that made you feel uneasy about taking a break, or resulted in a stressful situation for you or your loved one.

Current and Future Experiences

What would it take?

Keeping the Good Life and Respite vision in mind and considering the trajectory up to this point, think about moving forward. LIST what would need to happen for you to feel confident and comfortable taking a short break, additional steps that need to be taken, or supports needed to move you and your loved one toward the vision of good respite?

Barriers to Overcome or Avoid

Considering potential barriers to you or your loved one having a successful respite experience can help you plan and address/avoid issues that are preventing your good respite vision. LIST potential barriers that might get in the way of you or your loved one having a successful respite experience.



MAPPING RESPITE

What are our options?



Integrated Star Worksheet

In this section, you will create your own Respite Integrated Supports Star “bank.”

Completing the star will help you think about your own life and the supports and resources you have available in each of the star categories that could help make respite possible or a better experience for you and your loved one.

You will need your LifeCourse Respite Portfolio, turning to the Integrated Star Worksheet on the back page.

First, in the center of the star, write “Respite Supports for” and the care recipient’s name.

The descriptions and examples that follow in this section will guide you through each part of the Integrated Supports Star.

Personal Assets and Strengths

It’s important to consider what the caregiver and the person receiving care bring to the table – what are the possessions, assets, skills, traits, knowledge and talents of you and your loved one that could make respite possible and a positive experience?

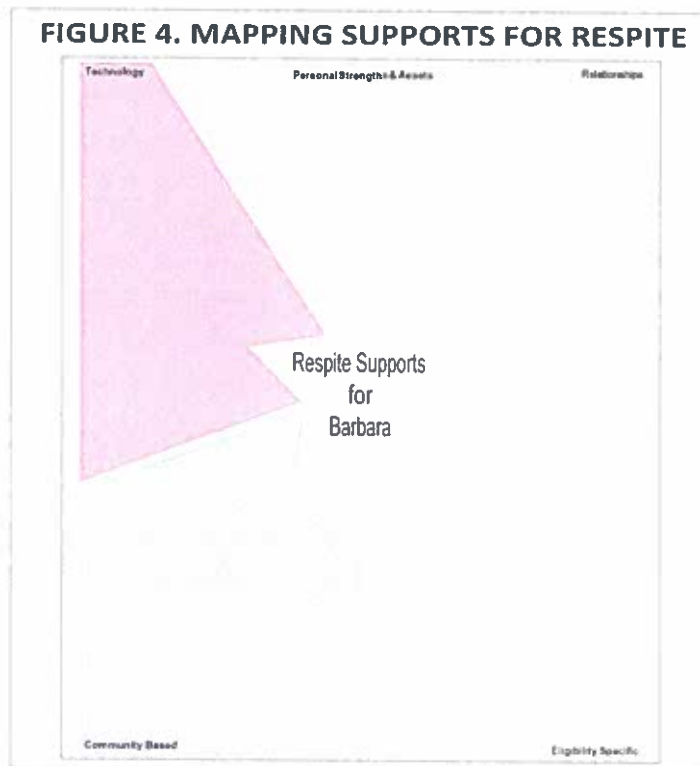
List you and your loved one’s knowledge, skills, personality traits, and material or financial resources that enable or could enable you to take a break in the light blue part of the star.

Technology

Everyone uses technology as part of daily life these days. How can technology be used to help make respite possible for you and a positive experience for your loved one?

List the technology you and/or your loved one have available or use now in the pink part of the star. Remember, technology can be high tech, like a smart phone, or low tech, like a digital watch.

FIGURE 4. MAPPING SUPPORTS FOR RESPITE



Examples:

- ability to stay home alone
- ability to dial 911
- doesn't wander
- knows/communicates address
- ability to use public transportation
- money to pay for respite

Examples:

- Medical Alert or Safety ID
- Remote monitoring
- Facetime/Skype
- GPS locator
- Smart device (phone or tablet)
- Computer

Relationships

Most of us rely on others in our life to give us advice, lend a hand, or be there for us when we need some support. How can relationships help you take a respite break and/or make it a positive experience for the care recipient?

List the people in your life (and if you'd like, their relationship to you or your loved one) right now that either do or could do even one thing that would enable you to take a short break in the purple part of the star.

Examples:

- Immediate or extended family members
- Friends
- Volunteers/ Mentors/Interns
- Teachers/Coaches
- Spiritual leaders and fellow worship congregants
- Co-workers, employers, carpool participants
- Other caregivers

Community-Based Resources

There are many places and activities that can be accessed simply by being a member of that particular community. Could participating in a community activity provide an opportunity for a caregiver break?

In the dark blue part of the star, list the places you and/or the person receiving care go and activities you participate in.

Examples:

- Parks and recreation, community center
- Public transportation
- Schools
- Camps
- Faith-based resources
- Parent/family cooperative
- Sitter-companion services

Eligibility Supports

Eligibility specific supports are resources the caregiver or care recipient may be able to receive because of income, age, diagnosis, disability, or other criteria. This might include formal respite supports, but can also consist of other options either or both of you might be eligible to receive based on various factors.

List the supports both you and the person receiving care are eligible for or currently receive in the green part of the star.

Examples:

- Medicaid, Medicaid waiver, SSI, SSDI
- Rehabilitative services
- Center-based respite, ie: adult daycenters
- Family care homes or host homes
- Home-based service programs
- State lifespan respite care programs
- Older Americans Act-Family Caregiver Support Program
- Respite voucher
- Consumer directed respite

Integrated Supports in Action: Nicole

Nicole is a busy mom of three, including two young children with special health care needs. She also cares for her aging mother. She works part time and leads a parent support group. Nicole does a lot of giving during her day and often finds herself coming up empty.

One of her children requires position adjustments on a regular basis. Nicole found herself stopping in the middle of tasks or making sure she was always nearby to be able to reposition her.

Nicole sat down and used the Integrated Supports Star Worksheet to help her think through her

supports and create short breaks for herself. When she filled out the star, Nicole began to look at her relationships differently.

She realized that her older daughter, who was home from college for the summer, could help reposition her younger sister as well as spend some time with her. This allowed Nicole to work on projects around the house as well as run occasional errands. By utilizing her relationship-based supports, Nicole greatly reduced the amount of stress that she had been feeling and allowed her to take care of things she needed to do. ★

PLANNING RESPITE

Can we find time?

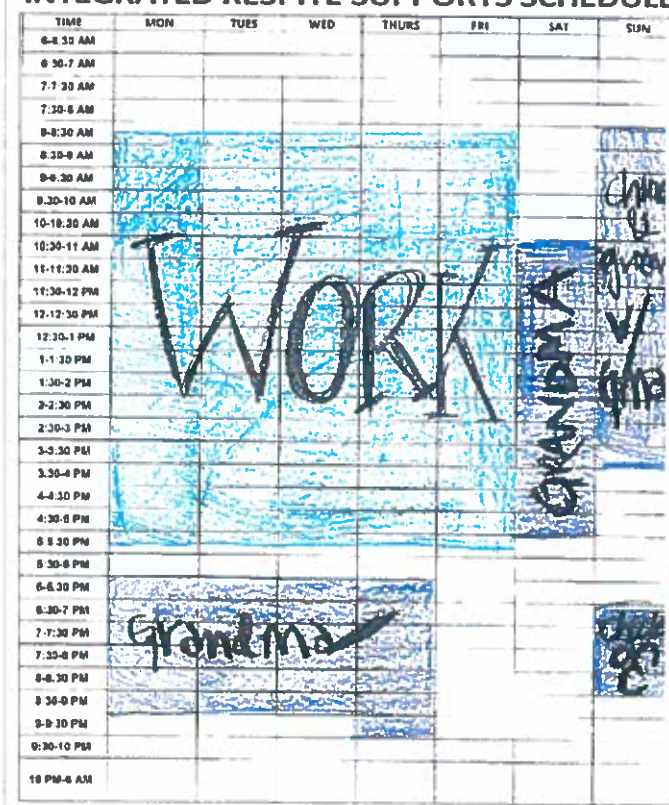


You and your loved one have worked hard to make plans for successful respite and identify resources that can help you reach your vision of good respite. With today's busy lifestyles, you may feel it is difficult to fit respite time into your schedule. Sometimes, you may not even realize how much you could really use some respite time in your life. This section will show you two ways you can use the Integrated Respite Support Schedule. If you don't already have one, download a copy for free at lifecoursetools.com. Since the colors used to color the schedule are the same as the Integrated Supports Star colors, you may want to have your Respite Integrated Star bank close by.

The schedule can help you see the need to take a break as well as find time to incorporate respite into your life. Fill out your own schedule as it is now so you have a good visual of when you are providing care and when you are meeting other life obligations.

The schedule can also help you see how and when your loved one is supported by yourself and others, and find windows of time when it might make sense for you to create respite opportunities. Fill in your loved one's schedule and write who supports him/her during specific times. It is helpful to shade the timeslots the same color as the type of support it corresponds to on the Integrated Supports Star.

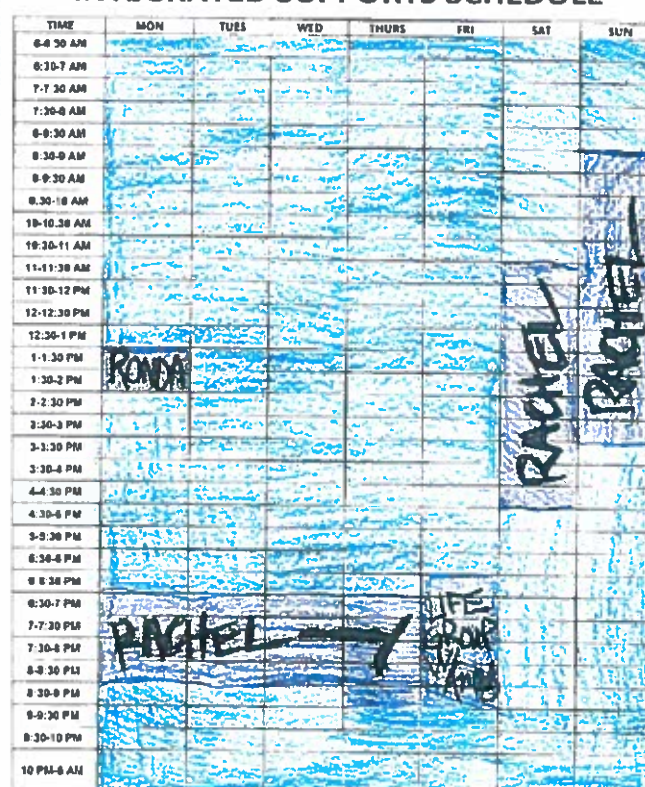
FIGURE 5. CAREGIVER INTEGRATED RESPITE SUPPORTS SCHEDULE



Example: If you work 8:30am to 5:00pm each day, color in those times as shown in the example above on the left. If you provide care for your loved one evenings and weekends, shade those times as shown. Maybe you have other family that you need to do something with. Add those times to the schedule (and if it overlaps some of the other times, that's okay), as that will help identify times when you need support with caregiving.

You can see in this example, the caregiver has little time to do other things she needs to do, and illustrates the need for finding time and supports for respite.

FIGURE 6. CARE RECIPIENT INTEGRATED SUPPORTS SCHEDULE



Example: If your loved one stays home by themselves during the day Monday through Friday, shade that time light blue, as that shows a personal strength. If they have a weekly meeting (like a Bible study or card game), shade that time based on who is supporting them.

Once filled in, you can look for times and ways to incorporate different supports so you can take a break, and your loved one can be supported to have good respite experiences and a good life.

NEXT STEPS

Making respite happen



Congratulations! You've completed your Charting the LifeCourse Respite Portfolio! We hope the process helped you understand the need and benefits of taking short breaks from caregiving, and identify resources and opportunities to make it happen. We hope you discovered and identified different options to get respite and plan to make it a successful experience for both you and the person for whom you provide care.

So now what? There are a number of ways you can put the information in your portfolio to good use.

The Charting the LifeCourse Respite Portfolio can be used:

- To help others provide good supports to your loved one while you are taking a break or are not around. Paid staff, volunteers, family, friends, or others who might be providing care in your absence can use the front page of the portfolio as a quick reminder about what's important and how to best support the person receiving care.
- To train and coach people on how to best provide support when you are taking a respite break, and understand your vision for a good life and a good respite experience for your loved one. It could be kept in a notebook that can be easily accessed and used as a reminder when someone new or who hasn't spent time with the care recipient recently is providing support.
- To help people know how to best support your loved one when he/she is participating in an activity or event in the community.
- To advocate with professionals in formal planning meetings for your loved one's support needs and your needs as a caregiver and family member. The vision and trajectory pages can help you articulate to others what is important, what has worked or not worked in the past, and how you and your loved one want to move forward. The Integrated Star can be used to help both you and professionals think about how paid services can be enhanced by using some of the other types of supports you identified in the LifeCourse Respite Integrated Supports Star, or if paid services aren't available, decide how to best meet the support needs of your loved one, and your need to have some time for yourself.
- As a good organizing tool. It can help with planning and coordinating the logistics of everyday life for you and your loved one. The Integrated Schedule can be used when planning and scheduling who is providing support and when. It can help you find time for yourself to get a break from caregiving. The Integrated Supports Star Worksheet can help you find solutions when challenges arise around respite and other life issues.

You may want to update the information in the Respite Portfolio from time to time, especially as life circumstances change for you, the person you provide care for, or your family. To see examples of how portfolios are used for respite needs, visit lifecoursetools.com/respite. You can also submit your own examples and stories if you wish!

Integrated Supports in Action: Susan and Jackie

Susan is the primary caregiver for her mom, Jackie, who is in the moderate stages of dementia. A couple of years ago, Susan became concerned about her mom's safety when she began doing things like leaving the stove on and letting strangers in her house. Since they did not have resources to pay for in-home support and any family members that could help care for her mother lived far away, she decided to bring her mom home to live with her.

Jackie now requires more intensive support. A couple of months ago, Susan decided to quit her job to stay home full time with her. She now cares for Jackie on a daily basis and rarely gets a break.

Susan recently used the Integrated Support Star to think through the resources they had available to help her have a break.

When she filled out the star, Susan noticed that they did not participate in many community activities. She was able to find a church-run volunteer program for people with dementia that met twice a week for a couple of hours. Jackie now attends that group and Susan uses that time to run errands, go grocery shopping, or just stay home and take a nap. She says that those small two-hour breaks during the day have really helped recharge her batteries. ★

RESOURCES FOR RESPITE



The ARCH National Respite Network includes the National Respite Locator, a service to help caregivers and professionals locate respite services in their community, the National Respite Coalition, a service that advocates for preserving and promoting respite in policy and programs at the national, state, and local levels, and the Lifespan Respite Technical Assistance Center which is funded by the Administration for Community Living in the US Department of Health and Human Services.

The resources below, arranged by the categories of the Integrated Supports Star you just learned about, are just a few examples of national resources to get you started, and help you to make respite happen.

To find even more resources, visit archrespite.org.

PERSONAL ASSETS & STRENGTHS

VolunteerMatch.org

Search engine with hundreds of thousands of opportunities for individuals to give back and share their time and talents with their community.

National Center for Creative Aging creativecaregiving.creativeaging.org

Free resource providing creative lessons to address the needs of family and caregivers of adults living with Alzheimer's disease and related cognitive disorders.

COMMUNITY RESOURCES

YMCA.net

YMCAs offer recreation and exercise programs for individuals of all ages and abilities.

Public Libraries usa.gov/libraries

Public libraries lend books, movies, music, and offer recreational and educational programs yearround.

TECHNOLOGY

State Assistive Technology Projects ataporg.org

Listing of statewide programs helping people with disabilities and their families select and acquire assistive technology devices for all types of settings.

LotsaHelpingHands.com

Manage care schedules online for individuals of all ages.

AARP Technology aarp.org/technology

Provides information, webinars, and resources for older Americans and their caregivers to learn more about technology for entertainment, support, and more.

RELATIONSHIP-BASED

Parent to Parent USA (P2PUSA) p2pusa.org

Find your state P2P to connect with someone who's 'been there' and find out how they made respite happen for their family.

AARP.org Caregiving aarp.org/caregiving

Tips and advice for caregivers at all stages, including articles, online discussion boards for caregivers to connect, and links to resources.

ELIGIBILITY SPECIFIC

ARCH National Respite Locator Service

respitelocator.org

Search engine of local respite programs and providers serving family caregivers of individuals with any disability or chronic condition, or of any age.

ARCH Respite Fact Sheets

archrespite.org/productspublications/arch-fact-sheets

Provides an overview of the different types of respite programs available and how to access them.

Eldercare.gov

Find your local Area Agency on Aging or Senior Center and additional resources.

Family-to-Family Health Information Centers

fv-ncfpp.org

Federally funded centers that provide information and referral, training through workshops, and family-friendly materials to help you navigate life.

THE Charting the LifeCourse FRAMEWORK




This guide was developed using the *Charting the LifeCourse*, a framework created to help individuals and families of all abilities and all ages develop a vision for a good life, think about what they need to know and do, identify how to find or develop supports, and discover what it takes to live the lives they want to live. Individuals and families may focus on their current situation and stage of life but may also find it helpful to look ahead to think about life experiences that will help move them toward an inclusive, productive life in the future.


Even though it was originally created for people with disabilities, this universally-designed framework may be used by any person or family making a life plan, regardless of life circumstances.


FOUNDATION OF THE LifeCourse FRAMEWORK

The following are the building blocks of the charting the Charting the LifeCourse framework. They are the core principles and values that are important as we begin to think differently about what it means to support individuals with disabilities and their families to have good lives.

Core Belief: All people have the right to live, love, work, play, and pursue their life aspirations.

 **ALL People**
ALL people, regardless of age, ability or family role, are considered in our vision, values, policies and practices for supporting individuals and families.

 **Life Stages and Trajectory**
Individuals and families can focus on a specific life stage, with an awareness of how prior, current and future life stages and experiences impact and influence life trajectory. It is important to have a vision for a good, quality life, and have opportunities, experiences and support to move the life trajectory in a positive direction.

 **Life Outcomes**
Individuals and families plan for present and future life outcomes that take into account all facets of life and have life experiences that build self-determination, social capital, economic sufficiency and community inclusion.



Family System and Cycles

People exist and have give-and-take roles within a family system. Roles adjust as the individual members change and age. Individuals and families need supports that address all facets of life and adjust as the family ages through family cycles and the roles and needs of members change.



Life Domains

People lead whole lives made up of specific, connected, and integrated life domains that are important to a good quality of life. These include daily living, community living, safety and security, healthy lifestyles, social and spirituality, and citizenship and advocacy.



Individual and Family Supports

Supports address all facets of life and adjust as roles and needs of all family members change. Types of support might include discovery and navigation (information, education, skill building); connecting and networking (peer support); and goods and services (daily living and financial supports).



Integrated Delivery of Supports

Individuals and families access an array of integrated supports to achieve the envisioned good life, including those that are publicly or privately funded and based on eligibility; community supports that are available to anyone; relationship-based supports; technology; and that take into account the assets and strengths of the individual and family.



Policy and Systems

Individuals and families are truly involved in policy making so that they influence planning, policy, implementation, evaluation and revision of the practices that affect them. Every program, organization, system and policy maker must always think about a person in the context of family.

To learn more about the Charting the LifeCourse framework, visit lifecoursetools.com.

Connect with us

ARC National
Respite
Network
And Resource Center
arcnrespite.org



Definitions

Activities of Daily Living (ADLs) – everyday tasks related to personal care usually performed for oneself in the course of a normal day, including bathing, dressing, grooming, eating, walking, taking medications, and other personal care activities.

Alzheimer's Disease- Alzheimer's disease is a type of dementia that causes problems with memory, thinking and behavior. Symptoms usually develop slowly and get worse over time, becoming severe enough to interfere with daily tasks.

Anger- a strong feeling of annoyance, displeasure, or hostility.

Anxiety- a feeling of worry, nervousness, or unease, typically about an imminent event or something with an uncertain outcome.

Availability- the quality of being able to be used or obtained.

Behavioral Challenges- is defined as "culturally abnormal behaviour(s) of such intensity, frequency or duration that the physical safety of the person or others is placed in serious jeopardy, or behaviour which is likely to seriously limit or deny access to the use of ordinary community facilities.

Biological Parent- a parent who has conceived (biological mother) or sired (biological father) rather than adopted a child and whose genes are therefore transmitted to the child.

Burnout- exhaustion of physical or emotional strength or motivation usually as a result of prolonged stress or frustration.

Caregiver- a person responsible for the physical and emotional support of someone who cannot care for them self.

Caregiver Assessment – a systematic process of gathering information that describes a caregiving situation and identifies the particular problems, needs, resources and strengths of the family caregiver. It approaches issues from the caregiver's perspective and culture, focuses on what assistance the caregiver may need and the outcomes the family member wants for support, and seeks to maintain the caregiver's own health and well-being.

Caregiver Reassessment – a follow-up interview with the caregiver on a regularly scheduled basis or as needed.

Care Recipient – an adult or child with needs who requires care or supervision to meet the person's basic needs.

Consumer Directed– the caregiver will identify an individual or agency to provide respite.

Dementia- a chronic or persistent disorder of the mental processes caused by brain disease or injury and marked by memory disorders, personality changes, and impaired reasoning.

Depression- feelings of severe despondency and dejection.

Developmental Disability- a diverse group of chronic conditions that are due to mental or physical impairments that arise before adulthood.

Foster Parent- are people who officially take a child into their family for a period of time, without becoming the child's legal parents. The child is referred to as their foster child.

Functional limitation- is a restriction in the ability to perform an action or activity in the manner or within the range considered 'normal' and which is attributable to impairment.

Guilt- the fact of having committed a specified or implied offense or crime, the state of one who has committed an offense especially consciously, feelings of deserving blame especially for imagined offenses or from a sense of inadequacy, a feeling of deserving blame for offenses.

Hobbies- an activity done regularly in one's leisure time for pleasure.

Instrumental Activities of Daily Living (IADLs) – activities related to independent living, such as preparing meals, managing money, shopping for groceries or personal items, performing light or heavy housework, and using a telephone.

Intellectual Disability- a disability characterized by significant limitations both in intellectual functioning (reasoning, learning, problem solving) and in adaptive behavior, which covers a range of everyday social and practical skills. This disability originates before the age of 18.

Irritation- the state of feeling annoyed, impatient, or slightly angry, inflammation or other discomfort in a body part caused by reaction to an irritant substance.

Learning Disability- a condition giving rise to difficulties in acquiring knowledge and skills to the level expected of those of the same age, especially when not associated with a physical handicap.

Legal Guardian- the primary caretaker of a child or minor. This person may be personally selected by the child's biological parents, or appointed by the court. Guardianship arrangements are necessary when a child's biological parents are unable to provide care.

Long-Term Care (LTC) – a combination of medical, nursing, custodial, social, and community services designed to help people who have disabilities or chronic care needs, including dementia. Services may be provided in the person's home, in the community, in assisted living facilities or in nursing homes.

Medicaid- is a health care program that assists low-income families or individuals in paying for doctor visits, hospital stays, long-term medical, custodial care costs and more. Medicaid is a joint program, funded primarily by the federal government and run at the state level, where coverage may vary.

Mental Health- a person's condition with regard to their psychological and emotional well-being.

National Family Caregiver Support Program (NFCSP) – a federal program created by Congress in the 2000 Amendments to the Older Americans Act to recognize the complexities of caring for family members, loved ones and friends. Under the NFCSP, the states use federal funds to offer direct support services to family caregivers of persons age 60 and older, including information to caregivers about available services; assistance to caregivers in gaining access to supportive services; individual counseling, support groups and caregiver training; respite care; and supplemental services (e.g., emergency response systems, home modifications).

Overwhelmed- overcome by force or numbers, completely overcome or overpowered by thought or feeling.

Physical disability- a limitation on a person's physical functioning, mobility, dexterity or stamina.

Power of Attorney- the authority to act for another person in specified or all legal or financial matters.

Respite – a temporary break from providing care to a loved one with a significant disability or chronic illness.

Referral- an act of referring someone or something for consultation, review, or further action.

Relax- make or become less tense or anxious.

Reluctant- unwilling and hesitant; disinclined.

Respite Provider- an individual, agency or facility a caregiver selects in order to receive a break.

Screening – a short rapid review with caregivers that identifies those at risk, leading to an opportunity for a full assessment for those wishing to proceed.

Social Isolation- is a state of complete or near-complete lack of contact between an individual and society.

Social Life- the part of a person's time spent doing enjoyable things with others.

Stress- in a medical or biological context stress is a physical, mental, or emotional factor that causes bodily or mental tension. Stresses can be external (from the environment, psychological, or social situations) or internal (illness, or from a medical procedure).

Veteran- Code of Federal Regulations defines a veteran as “a person who served in the active military, naval, or air service and who was discharged or released under conditions other than dishonorable.”



Additional Resources

AARP

A consumer-oriented site offering caregivers information about general topics in caregiving, including "caring for parents" and "finding help."

Phone: 888-687-2277

Website: www.aarp.org/caregiving

Administration for Community Living National Family Caregiver Support Program (NFCSP)

Offers information about the National Family Caregiver Support Program, including where to turn for support and assistance, and services for family caregivers.

Website: www.acl.gov/programs/support-caregivers/national-family-caregiver-support-program

ARCH National Respite Network

Provides information on respite programs, policy and other initiatives (such as trainings and conferences) around the country. The site also includes a respite locator service to help you find your nearest providers.

Website: archrespite.org

Caregiver Action Network

Consumer-oriented site that supports family caregivers and offers education, information and resources.

Website: caregiveraction.org

**Family Caregiver Alliance
National Center on Caregiving**

Offers comprehensive caregiving information and advice, fact sheets, reports and studies, discussion groups and newsletters for caregivers, practitioners, policymakers and researchers. In addition, a state-by-state resource guide offers a searchable database of publicly-funded caregiver support programs.

Phone: 800-445-8106

Website: www.caregiver.org

**Mather Lifeways
Powerful Tools for Caregivers**

The Mather LifeWays Institute on Aging offers fee-based online and in-person education programs that enhance the knowledge and self-care skills of family caregivers.

Phone: 888-722-6468

Website: www.matherlifewaysinstituteonaging.com

Powerful Tools for Caregivers: www.powerfultoolsforcaregivers.org

National Alliance for Caregiving

Includes information on caregiving research studies and policy analyses and links to the Family Care Resource Connection, which includes reviews and ratings of books, videos, websites, and other resources on family caregiving issues.

Website: www.caregiving.org

National Institute on Aging

Offers free publications on caregiving subjects including doctor/patient communication and a long-distance caregiver guide.

Website: www.nia.nih.gov

Rosalyn Carter Institute for Caregiving

Includes information on programs, education and training, a caregiver community forum, publications and current events in caregiving.

Website: <https://www.rosalynncarter.org/>

Idaho Resources for Family Caregivers

The Alzheimer's Association Greater Idaho Chapter Caregiver Support Groups
208-206-0041 or 1-800-272-3900 (24/7 Helpline)

www.alz.org/Idaho

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Alzheimer's Idaho2

www.alzid.org

Educational Resource for caregivers. They also provide subsidized Respite Program.

AARP

Cathy McDougall 208-855-4003

<http://states.aarp.org/region/idaho/>

Jannus

Legacy Corps for Veterans and Military Families

1607 West Jefferson Street Boise, Idaho 83702

Melissa Radloff

208-333-1363 x 4282

<http://www.jannus.org/program/legacy-corps/>

Legacy Corps is a volunteer-powered program supporting family caregivers. Volunteers provide companionship respite, care giver education, and link to community resources.

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Community Partnerships of Idaho Care Plus

208-629-3610

Email: caregiver@mycpicp.com

Family Caregiver Resources
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Living Independence Network Corporation

Boise 208-336-3335; Caldwell 208-454-5511; or Twin Falls at 208-733-1712.

They provide personal care service, chore service, and in-home respite care.
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LINC Ramp and Rail Loan Program

1878 W Overland Rd

Boise, ID 83705

Contact Todd Wilder at 208-336-3335 ext.17
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Ellett Homes,INC

208-890-8718

Accessible Home Modifications

Free In-Home Consultation
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Cypress

Rebecca Gillet, Physical Therapist and Owner

208-859-5072

www.cypresshometherapy.com

Private Pay Fitness and Wellness Physical Therapy Visits and home safety assessments.
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Safety for Seniors

Bryan C. 208-867-2752

www.safety-for-seniors.com

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Hands of Hope Northwest

1201 South Powerline Road, Nampa, Idaho 83686

208-461-1473

www.HandsOfHopeNW.org

Hours: Monday thru Friday 9 am-2 pm

Tuesdays 6:30 pm -7:30 pm

Hands of Hope Northwest is a faith-based, not-for-profit, corporation that distributes medical equipment to individuals in the Treasure Valley area through the Local Loan Program. This equipment is loaned out free of charge; however, a donation is encouraged.

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Idaho Assistive Technology Project (IATP)

208-885-3557

800-432-8324

<http://www.idahoat.org/>

IATP offers loans for assistive devices, sells new and used assistive devices, and provides training and technical assistance in using the devices.

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Knights of Columbus Risen Christ Council

208-362-4283 or 208-888-3782

Provides equipment on loan and/or for free.

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TRESCO of Idaho

208-866-4303

www.Trescoestateservices.com

Fiduciary services

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Honoring Choices

208-336-5533

info@honoringchoicesidaho.org

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Partnership for Prescription Assistance

888-477-2669

Program connects eligible individuals with discount prescription drugs and offers a single point of access to public and private patient assistance programs.

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Senior Health Insurance Benefit Advisors (SHIBA) Program

800-247-4422

SHIBA.idaho.gov

SHIBA is a statewide health insurance information, counseling and referral program that assists Idaho residents with choices and problems involving Medicare, Medicaid and long-term care.

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Medicaid Aged and Disabled Waiver Program

Region 4 208-334-0940 / Region 3 208-455-7150

<http://healthandwelfare.idaho.gov/Medical/Medicaid/tabid/123/ItemId/3475/Default.aspx>

A Medicaid program that helps Idaho residents who are older, who have a disability, or who suffered a traumatic brain injury remain living at home or in the community by providing services, including:

- Personal care
- In-home care

Care Recipient Eligibility:

Multiple requirements:

- Adult age 18 and over with a disability OR adult who received a traumatic brain injury after the age of 22 years
- Must require skilled nursing facility level of care
- Must be low-income and enrolled in Medicaid

check website for local information

Idaho CareLine: 211

.....

Are you stressed by caregiving?

Powerful Tools for Caregivers



A 6-part workshop series designed to help family caregivers find balance while caring for a loved one.

Learn to:

- * Reduce stress
- * Make tough decisions
- * Navigate family dynamics

Thanks to sponsors and dedicated volunteers, this class is offered FREE of charge!

“After taking this class I am a more confident caregiver! Having tools to resolve problems is a definite advantage in becoming a better caregiver and a happier, wiser, healthier me... a healthier ‘us’!”

The Powerful Tools for Caregivers program will provide you with tools and strategies to better handle the unique caregiver challenges you face.

Classes meet once a week for 6 weeks

Learn to Thrive, not just Survive!

For classes scheduled in your area:
Call (208) 947-4281 or email- ashoup@jannus.org
Visit: <http://www.jannus.org>



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Bureau of Long Term Care and Medicaid Estate Recovery

March 27, 2019



IDAHO DEPARTMENT OF
HEALTH & WELFARE



What is Medicaid?

- Medicaid is federally subsidized, state administered health insurance for certain populations
- In Idaho, Medicaid is available to:
 - Children under age 19
 - Parents or other related adults with eligible children under age 19
 - Pregnant women
 - Women diagnosed with breast or cervical cancer or pre-cancer
 - People age 65 or older
 - People who are blind or disabled (using Social Security criteria)

Medicaid Covers:

Physician
services

Hospital
services

Dental services

Behavioral
health services

Physical,
occupational
and speech
therapies

Medical
transportation

Durable
medical
equipment and
supplies



Medicaid Waivers

- ▶ What is a Medicaid Waiver?
 - ▶ A vehicle for states to test new or different ways to deliver and pay for health care services.
 - ▶ Allows the state to use different standards for eligibility and benefits than the federal guidelines, normally used for targeted populations.
 - ▶ Requires an application to the Centers for Medicare and Medicaid Services and their approval to operate.
- ▶ Copies of Idaho's approved waiver applications are available on the [Health and Welfare website](#)

Idaho's Aged and Disabled Waiver

► Purpose is to provide necessary services and supports to help keep individuals out of facilities and in their communities when possible

- ✓ Increase participants' quality of life
- ✓ Enhance community integration
- ✓ Decrease cost to the State



Aged and Disabled Waiver Services

| | |
|--------------------------|---|
| Adult Day Health | Environmental Accessibility/Adaptations |
| Homemaker Services | Home Delivered Meals |
| Respite | Non-medical Transportation |
| Supported Employment | Personal Emergency Response System |
| Attendant Care | Skilled Nursing Services |
| Chore Services | Specialized Medical Equipment/Supplies |
| Day Habilitation | Consultation |
| Residential Habilitation | Companion Services |
| | Transition Services |
| | Adult Residential Care |

Eligibility Requirements

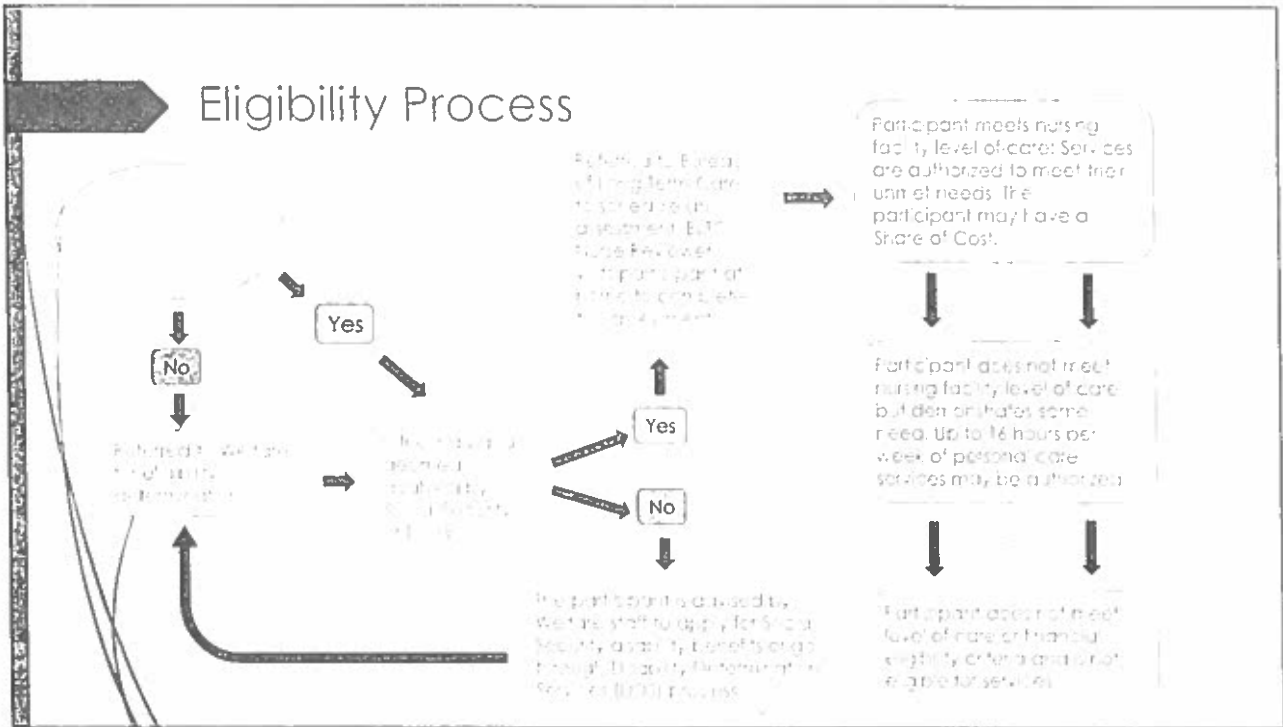
- ✓ 18 years or older
- ✓ Disabling condition
- ✓ Can be safely maintained in their home or community
- ✓ Must meet financial eligibility
- ✓ Meet Nursing Level of Care as determined by the Uniform Assessment Instrument (UAI)
- ✓ Must need and receive a service at least once every 30 days
- ✓ Must be cost effective

Eligibility Process

Step 1: Financial eligibility determination. This step is completed by our partner, the Division of Self-Reliance.

Step 2: Level of care eligibility determination by the Bureau of Long-Term Care. This can take up to two weeks after Step 1.

Step 3: The Bureau of Long-Term Care notifies Self-Reliance of the assessment outcome to finish processing the application.



- ### The Uniform Assessment Instrument (UAI)
- The UAI is the tool used to evaluate level of care
 - Designed to identify individual's unmet needs
 - Determines the number of units and services the individual is eligible to receive
 - Redetermination at least annually, services/hours can change if the person's needs change

Share of Cost

- ▶ Share of Cost is determined during the financial eligibility process conducted by the Department of Self Reliance
 - ▶ (877) 465-1233
- ▶ It is the amount of money a participant must contribute towards the cost of their services
- ▶ In practice – the member must pay their Share of Cost to the service provider each month.

Medicare Medicaid Coordinated Plan (MMCP)

- ▶ Voluntary program available to people who are eligible for Medicare Parts A and B as well as full Medicaid (called "duals")
- ▶ One health plan integrates Medicare and Medicaid benefits for an individual
- ▶ Purpose is to serve this population in a more efficient system
- ▶ Visit <http://mmcp.dhw.idaho.gov> for more information about this program

MMCP and Idaho Medicaid Plus

- ▶ A new program for duals, called Idaho Medicaid Plus (IMPlus) is being implemented.
- ▶ IMPlus is mandatory for duals that are not enrolled in the MMCP and are not in an excluded population.
- ▶ Visit <http://mmcp.dhw.idaho.gov> for more information about this program

Common Misconceptions

- ▶ "My income is too high to get Medicaid."
- ▶ "I had this service in another state, so Idaho Medicaid must cover it too."
- ▶ "If I get on Medicaid, I will lose my house."

Medicaid Estate Recovery

- ▶ Federally required that states recover Medicaid costs from estate proceeds
- ▶ Recovery is deferred when there is a surviving spouse or disabled child
- ▶ Recovered funds allow future Medicaid recipients access

Recovery Process

Step 1: Deceased Medicaid members are identified monthly

Step 2: Contact is made with their authorized rep. Information exchanged.

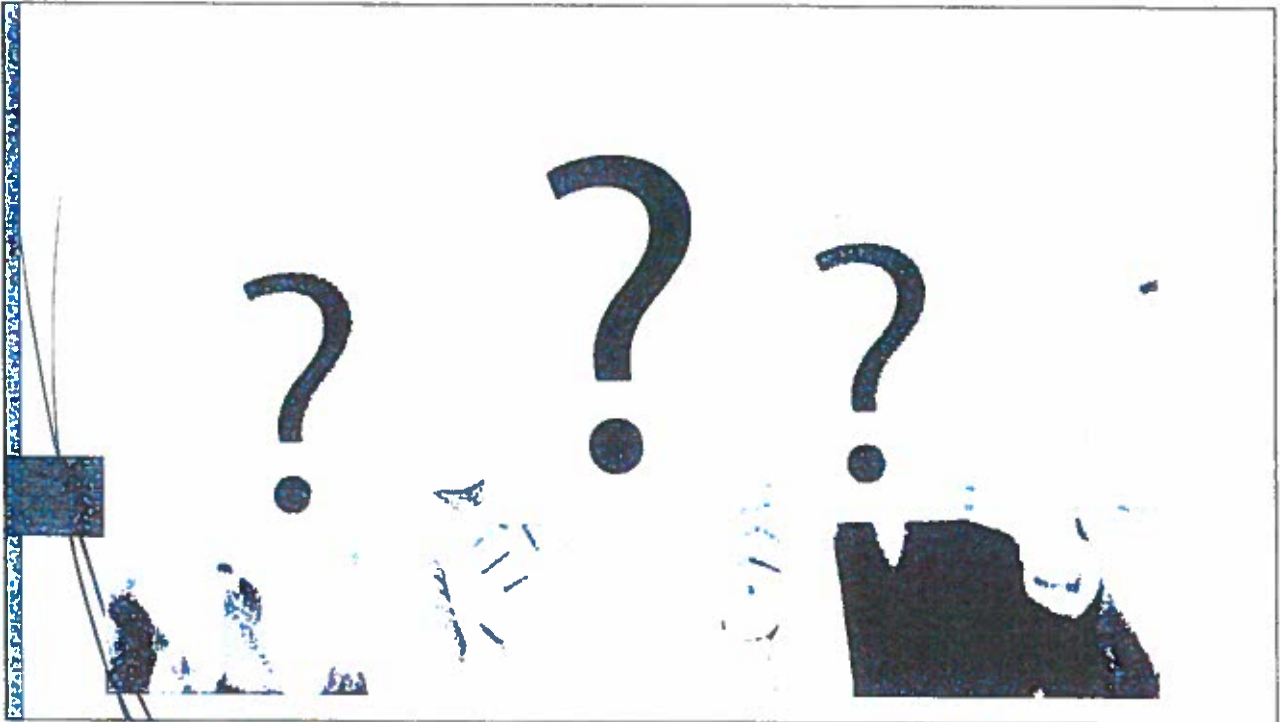
Step 3: A lien is placed in the decedent's name, indicating Medicaid's interest.

Estate Recovery does:

- ✓ Review all assets held by the deceased at the time of death
 - ✓ Real property, cash, insurance policies
- ✓ Establish a case, and contact an authorized representative
 - ✓ Includes a detailed exchange of information
- ✓ Document the total costs paid by Medicaid
 - ✓ Provided through a series of reports generated by MMIS team

Estate Recovery does not:

- ✓ Seize property
 - ✓ Probate is opened by the family or authorized representative
- ✓ Place liens in excess of dollars spent
 - ✓ Medicaid will only recover funds paid out on the member's behalf for medical care
- ✓ Recover when a spouse remains living
 - ✓ There are also provisions for disabled children



Contacts

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