



# Keeping It Professional Training Guide



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# Introduction

Thank you for attending the Keeping it Professional training offered by the Oregon Home Care Commission. Participating in the training shows how committed you are to being the best homecare or personal support worker you can be. The work you do is so valuable and makes a true difference for people who want to live as independently and successfully at home as possible.

Our hope is that you will continue to use this training guide after today. You will find helpful information about being a professional, setting boundaries, communicating effectively with others and managing stress.

## Training objectives

At the end of this training, you will be able to:

- Understand what professionalism is and how it relates to your role as a homecare and personal support worker;
- Learn to set and maintain professional boundaries;
- Identify and apply work-related values, including ethics and confidentiality;
- Communicate effectively with others;
- Understand your roles and responsibilities as a homecare or personal support workers; and
- Identify ways to manage stress.



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# Caregiving is a professional career, not a job

*“We make a living by what we get, but we make a life by what we give.”*

–Sir Winston Churchill

Caregiving is a professional career, not a job. A job is something you do for money. Certainly, earning money is important, but there are many things you could do to earn a paycheck.

There is a reason you decided to dedicate your life to helping others. Have you ever stopped to think about why you chose to be a homecare or personal support worker? You probably have several reasons. It’s helpful to keep them in mind, especially when you are having a stressful day.

## What does it mean to have a career?

A career is a long-term pursuit of a lifelong ambition. It is something you invest in and strive to be the best at by continuing to develop your skills and knowledge base.

Having a career brings a sense of enjoyment, fulfillment, meaning and importance to the work you do. Your career as a homecare or personal support worker is important and meaningful. It allows people to have fuller lives, live at home and stay active in the community. We all want these things for ourselves and the people important to us.

When you have a career, you invest in lifelong learning. Our hope is that you will take all the trainings offered by the Commission. The OHCC Training News lists all the trainings offered throughout the state each month. You can also participate in the various certification programs offered by the Commission, such as Professional Development Certification, Enhanced Homecare Worker, Enhanced Personal Support Worker, Exceptional Personal Support Worker, and Traditional Health Worker.

Having a career also means balancing the time you spend at work with your personal life. There is a saying, “You can’t pour from an empty cup.” This is about taking care of yourself. If you don’t keep your “cup” full, you have nothing left to give or share with others. Empty cups lead to burnout. When you are burned out, you can’t do the best job helping others. When you take the time to fill your cup by doing things you enjoy and recharging, you will be more calm, healthy, productive, focused and compassionate.

There are always signs that alert you it’s time to recharge. You just have to pay attention. The signs can be different for everyone.

## Warning signs of stress

Frequent headaches

Difficulty keeping track of things

Difficulty concentrating

Poor judgment

Racing thoughts

Constant worrying

Depression

Agitation

Moodiness

Irritability

Anger

Feeling overwhelmed

Loneliness and isolation

Feeling on edge

Being snippy or cranky

Aches and pains

Diarrhea or constipation

Nausea

Dizziness

Rapid heartbeat

Frequent colds or flu

Eating more or less

Sleeping too much or too little

Using alcohol, cigarettes or drugs to relax

Biting nails, pacing, fidgeting

Gritting or grinding your teeth

Overreaction to minor things

Constant tiredness, weakness or fatigue

What are the signs that tell you that you need to take a break?

## How to reduce stress

Deep breathing

Focus on what you're thankful for

Remember why you do the work you do

Take a break

Yoga

Meditation

Exercise

Eat a balanced diet

Watch a funny movie

Read

Manage your time

Talk with a friend

Listen to music

Spend time with pets

Have lunch or coffee with a friend

Talk with a counselor or clergy member

Journal

Take a long bath

Work in the garden

Get a massage

Laugh

Is there something on the list that you can commit to trying? Managing your stress is critical as a homecare or personal support worker. Unmanaged stress can have long-term effects on your health – physically, emotionally and mentally.

Please consider taking the Stress Management and Relaxation Techniques (SMART) training offered by the Oregon Home Care Commission.

Finally, having a career means developing values and a sense of purpose. Values are things that you believe are important to how you live and work.

Some work-related values are professionalism, accountability, compassion, competence, consistency, trustworthiness and dependability.



# Work-related values

*Do you want to be known for your actions and attitude?*

**Professionalism describes the qualities, skill, and behaviors in the workplace. It includes:**

- How you present yourself;
- What you say and how you say it;
- How you act;
- How you treat others; and
- Your work ethic

*Professionalism is a state of mind.*

## How you present yourself

**Show-up.** You have heard the saying, “You only get one chance to make a good first impression.” Making a good impression has everything to do with how you present yourself.

When you are a professional, you show up – physically and mentally. It’s important to be present in the moment and give your employer and the work you do your full attention. There is such a thing as “presenteeism.” This is when you physically show up, but your heart and mind aren’t into the work you are doing. You are there without really being there, which is not safe for you or your employer. This is especially true if you help with transferring, medications, driving or supervision.

Being a professional also means showing up on time and ready to work. Come prepared. Your employer relies on you to be there on certain days and times because he or she needs your help. Every minute you are late is a minute longer your employer goes without help. A few minutes may not seem like a long time until you’ve tried holding your breath that long. Imagine if you needed help with getting out of bed in the morning and getting dressed. Ask yourself, “What would I do if I didn’t have someone to help me?” “What would I do if the person I trust to help me doesn’t show up on time?” What would your life look like?

If you accept a job interview, show up. If you are unable to make it for some reason, inform the consumer right away. Being a no-show is a prime example of unprofessionalism. You do not want to have a reputation as being unreliable.

Return phone messages of consumers who are interested in interviewing you, even if you are declining. One of the biggest frustrations we hear from consumers is that workers do not call back or, when they do, they are not available to work. If you aren’t looking to take on more employers, please make sure to change your status in the Registry. You can change your availability anytime.

Your email address and voice mail message can make the difference between getting a job or not. If you are going to use them as part of your career, make sure they are appropriate and professional.

**Look like a professional:** Remember, even though you are working in an informal setting like someone’s home, it’s important to look like a professional. This shows you take your work seriously and take pride in what you do. Just as important is having good personal hygiene and grooming habits, especially since you will physically work closely with your employer.

**Smile:** The work you do is serious, but that doesn’t mean you can’t have fun, too. When you smile, you are more approachable and personable, and interaction with your employer is more comfortable. It’s hard to smile and be negative at the same time.

*A warm smile is the universal language of kindness.*

– William Arthur Ward

## What you say and how you say it

What you intend to say and what someone else hears can be completely different based on word choice, body language and tone of voice.

Be aware of your tone of voice. Some people are naturally loud talkers and are very direct. This can be mistaken as aggression. It's important to let your employer know what your communication style is before starting to work. You may need to adjust the way you communicate if he or she feels uncomfortable.

Pay attention to your body language and that of your employer's. It speaks louder than words. Do your words match your body language? If you say you

are not mad, but your arms are crossed and you are scowling, your body language will speak louder than your words. If you agree to do something but roll your eyes, can your employer trust you to do what you say?

Use People First Language: People are not their diagnoses or disabilities. People First Language puts the person before the disability and describes what a person has, not what a person is. Someone isn't a quadriplegic or "quad." They are someone who has quadriplegia. Someone isn't autistic; they have autism. People First Language is not political correctness. Instead, it demonstrates respect, dignity and the Platinum Rule of "Treat others the way they want to be treated." Using a diagnosis as a defining characteristic reflects prejudice and also robs people of the chance to define themselves.

Words matter and have power. Use them to empower others. Do you want to be known by your name or your diagnosis? "Let me introduce you to my friend Joe" not "Let me introduce you to my friend Joe who has autism."

Here are some examples of People First Language:

Say	Instead of
People with disabilities	The handicapped or disabled
He has a cognitive disability	He's mentally retarded
She has Down Syndrome	She's Down's/a Down's kid
He has a physical disability	He's crippled
Children with disabilities	Normal/healthy/regular children
Brain injury	Brain damaged

For more information, please visit [www.disabilityisnatural.com](http://www.disabilityisnatural.com) to read and download the entire People First Language handout.



**Talk with, not at:** “Talking with” someone is about having a conversation, trying to understand where they are coming from and being open to what another person has to say. It involves active listening. Active listening is not just hearing the words someone is saying, but understanding the message. It requires you to pay attention and stay in the moment instead of thinking about your response before someone has even finished his or her sentence.

“Talking at” someone is speaking to someone without considering what the other person thinks or feels, or how the person will respond. It isn’t about having a

back-and-forth conversation. You have already made up your mind about what you want to say and aren’t open to feedback from the other person. When you “talk at” someone, it is as if you are lecturing that person – that you know what’s best, regardless of what he or she wants or thinks. As a homecare or personal support worker, you will most likely have more experience working with individuals who need help and you may know more about certain medical conditions or disabilities than the worker does. You may find yourself giving advice that wasn’t requested, even if you know it will help the person.

## Exercise:

### Talking with or talking at?

Read each scenario and decide whether the example is “talking with” someone or “talking at” someone.

- 1 “You shouldn’t eat that cake. You know it isn’t healthy for you because you have diabetes. Your blood sugar will go up and you wouldn’t want that. Why don’t you give it to me and I will get rid of it?”
- 2 “I know how you love cake. I just worry because I know it makes your blood sugar go up and I care about you and your health. If you want, I’d be happy to make a dessert from your diabetic cookbook. What do you think?”
- 3 “I’m getting rid of the throw rug in the living room. It’s too dangerous and you’re going to fall. I think I will also rearrange the furniture, too, to clear a pathway. Yeah, I think that is the best thing to do. I have a lot of experience with this.”
- 4 “If you are interested, I have suggestions on how to make your home a little safer so you don’t fall. I would feel horrible if you got hurt. Do you want to talk about any of them?”

## How you act

**Be positive:** Focus on the positive. Focus on your employer’s strengths and what he or she can do. Being around someone who is negative is draining.

**Be an adult:** This means taking responsibility for your actions, words and attitude. It’s also about being accountable, dependable and consistent. Others count on you. Being an adult is accepting feedback and recognizing it’s just part of the job; it isn’t personal. It’s great to be young at heart, but don’t act childish.

**Demonstrate “grace under pressure”:** This means staying cool and calm when you’re under stress and not melting down in front of your employer. Keep things in perspective, breathe and take a quick break if you need one.

What can you do immediately to calm down? Some people count to 10; take several deep breathes; name something they are grateful for; or go somewhere quiet for a few minutes. Others practice mindfulness.

This means being present in the moment and not thinking about the past or worrying about the future. It’s the total opposite of being on autopilot.

**Maintain professional boundaries:** Setting and maintaining professional boundaries is the foundation of professionalism. This will be explored in more depth in the guide.

## How you treat others

Most people have heard about the Golden Rule – treat others as you would like to be treated. Have you heard of the Platinum Rule? Both rules are about respect. When you follow the Platinum Rule, you treat others the way they want to be treated. The Platinum Rule recognizes that everyone is different and how you want to be treated may not be the same as what someone else wants. People have different religions, cultures, values, preferences, personalities and communication styles. This means you need to get to know the person and what matters to him or her.

### What are some ways you can treat others with respect?

## There are many ways to treat others with respect:

- Address your employer by the name he or she prefers. Some people may prefer nicknames while others prefer something more formal like Mr., Mrs., Ms., etc. Ask how someone prefers to be addressed; don't assume. Using terms of endearment like "sweetie," "hun" or "kiddo" may be comforting to some consumers and offensive and disrespectful to others. Keep in mind, this is a professional career. It is doubtful you would call your manager or supervisor "sweetie" or "hun" if you worked in a different setting.
- Treat your employer's home and personal belongings with care. Ask permission before using the telephone or refrigerator for personal use or moving anything, like knick-knacks, throw rugs or furniture. If there are things or rooms off limits, respect that.
- Recognize your employer has the right to make his or her own decisions, even ones you don't agree with or you think are "bad." It isn't your place to lecture or take over because you "know what's best." Don't offer advice or your opinion unless you are asked or you ask permission. Try saying, "I have some ideas if you are interested."
- Do things the way your employer wants them done, not the way you think is best or how you've always done them. This can range from using certain cleaning products to how you help with bathing.

- Be pleasant and polite, even when your employer isn't being pleasant or polite to you. You can let your employer know he or she has hurt your feelings or has overstepped the boundaries you have set, but do so with kindness and remain calm.
- Be mindful of the language you use. This isn't limited to the use of foul or off-color language. It's using age-appropriate language. Although a child may use "diapers," that term is not appropriate to use when working with an adult. Adults typically use incontinent undergarments or use the name of the brand (Depends, Poise pads, etc.). Use words that feel comfortable to your employer. If you don't know what those words are, ask. Some adults may be put off with using the word "potty" while others choose to use that word to describe going to the bathroom. It may be fine to use the word "kiddo" when talking to a small child, but a teenager or young adult may not like that at all. Avoid baby talk, especially when talking to someone who isn't a baby.
- Honor your employer's religious and cultural beliefs and practices. You don't have to agree, but you do need to be respectful and recognize what is important to your employer.

## Your work ethic

Work ethic is about one's attitudes, feelings and beliefs about work.

Having a good work ethic means you:

- Have integrity (doing what is right, even when no one is looking);
- Have an emphasis on quality;
- Have a sense of responsibility and purpose;
- Are disciplined;
- Value what you do;
- Believe in teamwork.



When you have a good work ethic, doing a job “good enough” isn’t good enough for you. You take pride in the work you do and can stand by it. Instead of making excuses, you take responsibility for what you say and do. You don’t place blame or make excuses. If you make a mistake, you find a way to learn from it and improve.

You can have a good work ethic by staying focused, working hard to do the best job you can, and striving to always improve. You come to work on time, every time.

When you believe in teamwork, you recognize that you and your employer are on the same team working toward a common goal of helping your employer accomplish what is important to that person. You may know what is important for your employer, but you need to know what is important to your employer. It may not be the same thing. If you do not know what’s important to your employer, ask.

## Ethics

Ethics apply to every area of your life, not just work. They are your moral principles that affect your actions. More easily put, it is the difference between right and wrong, good and bad. Examples of morals include:

**Not gossiping:** Gossiping is not productive and can harm relationships, especially if you are gossiping with your employer about the consumer’s other employees, family or friends. Don’t gossip with your employer’s other workers about your employer or his or her family or friends. If you are gossiping about others, your employer may think you are talking behind his or her back, too.

**Telling the truth:** It’s better to tell the truth, even if it may be difficult to hear. Withholding information, telling partial truths or lying by omission destroys trust and can even jeopardize the safety and well-being of your employer.

**Keeping your promises:** Your employers depend on you. If you promise to do something, make

sure to follow through. With that said, make sure your promise is reasonable, doable, work-related, ethical and does not jeopardize your employer’s or your health, safety and well-being. “I promise not to tell” or “I promise to keep your secret” violates boundaries and jeopardizes safety, especially if their “secret” involves possible abuse, being taken advantage of or financial exploitation. Remember, legally you are a mandatory reporter. Make sure to know your limits and don’t over-commit yourself.

**Not cheating:** There are different ways of cheating. The first is “cutting corners” while doing tasks for your employer. It’s important to complete tasks the way your employer wants them done, even if you know or prefer a faster way. Your employer is in charge.

The other type of cheating is a very serious crime called Medicaid fraud. , You are committing fraud when you claim hours you did not work, claim miles you did not drive, alter vouchers or timecards or sign your employer’s name. Many homecare workers have been convicted of fraud and have seen jail time as a result. Your employer may ask you to cheat. “Just claim the time and we’ll split the money” or “Go ahead a take the weekend off and claim the hours. You’re a good worker.” This is called “collusion” and both the employers and workers have seen jail time due to fraud. If you are convicted of fraud, you will be placed on the Office of Inspector General’s exclusion list. This means you will not be able to work anywhere that accepts Medicare or Medicaid money.

Please consider taking the **Preventing Fraud and Abuse training** offered by the Commission.

**Not judging:** How do you feel when others judge you? You may not agree with the choices your employers make or how they live their lives. Your role is not to place judgement. Your role is to help people meet the goals they set for themselves, whether you agree or not. Honor your employer’s wishes and preferences.

**Being tolerant of differences:** Set aside your personal differences to work toward a larger goal.

# Setting and keeping professional boundaries



You are a homecare or personal support worker because you are compassionate and enjoy helping people. These are wonderful qualities. Because you care so much about people, you may go above and beyond to help someone. The downside is it can lead to compassion fatigue if you do not take care of yourself and set boundaries. Compassion fatigue is a state of mental, physical and spiritual exhaustion.

Fear and guilt are two main reasons people find it hard to set and keep healthy boundaries. Some may fear rejection or abandonment, so they say yes to things they don't want to do. Some people have a fear of confrontation – not wanting to argue or going along just to make things easier. Some people feel guilty as a result of saying no or hurting someone's feelings. Before you agree to do something, ask yourself if you are saying "yes" out of fear or guilt.

Being aware of your professional and personal boundaries is important for you and your employer. It's best to establish them at the beginning of your working relationship. Boundaries are limits about what you will or won't allow or do. They are meant for your well-being and protection. They help you decide what types of communication, behavior and interactions are appropriate. A lack of boundaries is like leaving the door to your home wide open; anyone, including welcome and un-welcomed guests, can walk in without hesitation.

## Healthy boundaries

There are many ways you can set and maintain healthy professional boundaries:

**Only share information you are comfortable sharing:** You decide what to share about your personal life. If there is information you prefer to keep private, it's OK to say that. It's very important not to overshare. It's fine to share information about yourself as a way of building rapport and a good working relationship. You may find you and your employer have several things in common. Make sure, however, you aren't sharing too much or too often. Ask yourself whether it's appropriate to share the information. You and your employer are not each other's friend, counselor or confidant. Don't share information because you need to talk or to help you feel better. It's natural to care for the people you help. Realize they care about you, too. Sharing too much can be burdensome, especially if you are talking about problems you may be having. Your employer will worry when you share your troubles.

**Refusing to break the law or bend the rules:** As a homecare or personal support worker, it is your responsibility to know what the State rules and policies are. You can lose your ability to work as a homecare or personal support worker if the rules are broken. You may be asked to do things for other people in your employer's home since "you are doing the laundry anyway." Providing services to others in the home you are not authorized to work for is against the rules. It is also against the rules to accept more money from employers or their family members on top of what you are paid as a Medicaid provider. As an example, a daughter may want to give you a couple of more dollars per hour than what you get as a Medicaid provider. A daughter may ask you to work extra hours for mom and pay you under the table. This is definitely against the rules. If in doubt, ask your employer's case manager, personal agent or service coordinator.

**Refusing to betray your moral values:** You need to stay true to yourself. If something doesn't seem right or feel right, it probably isn't. It's OK to say "no," especially if it isn't work-related. Trust your instincts.

**Refusing to allow someone to get too close to you physically or emotionally:** This is especially important in setting and maintaining professional boundaries. You are paid to provide authorized services as a homecare or personal support worker, not to become a friend or confidant. It's important for employers to respect your boundaries, both physically and emotionally.

If you find yourself in a situation that makes you feel uncomfortable or unsafe, respectfully let your employer know. If your employer or someone in his or her home is being inappropriate, ask them to stop and then remove yourself from the situation if you feel unsafe. If your employer is being verbally, physically or sexually abusive, let your employer's case manager, personal agent or service coordinator know so they can address the issue with your employer and develop a plan on how to manage the situation. You have the right to not work for someone who is being inappropriate or abusive. If able, finish your shift if the person cannot be left alone and notify the local office you will no longer be working for the individual.

**Not saving, rescuing or fixing people's problems:** You are not responsible for the choices other people make. Remember, you are paid to provide services on the task list, service plan or job description. You have a specific role as a homecare or personal support worker and it does not include serving as a representative, case manager, counselor or friend. You may be working for your own family member. Even still, people have the right to make their own decisions.

**Letting someone know, respectfully, if he or she has crossed the line, acted inappropriately or been disrespectful.** It's important to set boundaries up front, especially if you are working with someone who pushes boundaries. Always be calm and respectful. If you are not sure how to handle a situation, talk with your employer's case manager, personal agent or service

coordinator. Consider enrolling in the Challenging Behaviors and Working Together trainings.

**Discouraging flirting or suggestive behavior by your employer or his or her family members:** It's OK to let your employer or his or her family members know if their behavior or words make you feel uncomfortable and ask them to stop.

## Unhealthy boundaries

The following examples should alert you that neither you nor your employer are setting and maintaining healthy boundaries. These will ultimately have a negative impact on your working relationship.

**Letting your employer text or call you for non-work-related things, especially when you are off the clock:** This can also include "friending" on Facebook or another form of social media. Respect each other's private lives.

**Hanging out after work:** If you choose to hang out after work, make sure your employer knows you are off the clock and are not there as his or her homecare or personal support worker. If you are working for a family member, let your employer know you have switched roles from worker to family member. You may even want to visually show the change in roles by wearing a smock while working on the clock that you take off when your shift is over.

**Taking over or being overly involved in your employer's life:** Remember your role is providing help with what's on your task list or job description. That's it.

**Making decisions for your employer:** Your role is not to make decisions on behalf of your employer, especially related to services, health, finances or medical care. You take direction from your employer, not the other way around. Although your employer may want you to be present during his or her reassessments, your role is not to make decisions about what is on the service plan or what information your employer should or should not share with the case manager, personal agent or service coordinator. Never speak for your employer.

You should not present yourself as a decision maker when your employer is in the hospital or direct hospital staff to contact you to discuss medically related issues.

Some personal support workers work for their children as a paid support. When you are on the clock, you are working toward a shared goal and focusing on providing support so the consumer can engage in activities of his or her choice. You are not paid to do other household chores or talk to your friends on the phone. You can provide support to your family member/employer with making decisions, but your role is not to make decisions for him or her. You can help them make an informed choice by letting them know all of their options, not just what you think they need.

**Touching your employer without asking, even when helping with personal care:** Inappropriate forms of touching might include hugging, caressing or holding hands. While you may think these gestures show compassion or care, it's possible they make the consumer feel uncomfortable. Always ask if it is OK before you begin helping with personal care.

**Going against your personal values or rights in order to please your employer:** Even if it feels uncomfortable and you are afraid of hurting someone's

feelings, say "no" to doing something you know is not right or goes against your values. As a homecare or personal support worker, you are accountable and responsible for every decision you make.

**Having a romantic relationship with your employer or his or her family members:** This puts everyone in a very vulnerable position. If you find that you both want to be in a relationship, it is consensual and the person is of age, it's best to stop working for that person as a homecare or personal support worker.

**Doing special favors, giving gifts or accepting gifts from your employer:** Are you treating this employer differently than your other employers? Part of being ethical is showing equal courtesy and respect to everyone, not just "favorites." Do not accept money or gifts from employers. Perishable items, such as food or flowers, are generally not a problem as long as they are of a minimal value and are not considered payment for work. But any item could be considered a gift and could result in an investigation. It's best to head off problems before gift-giving occasions. By saying something like, "I know the holidays are coming, but it would be best if we don't exchange gifts" can avoid problems from occurring.



## Other important things to keep in mind

- Make sure you and your employer are clear about what is OK to talk about and what is off limits. This can include things like religion, politics, beliefs, finances, family and how you choose to live your life.
- It's important to set clear boundaries with your employer's family and friends. Your employer may be fortunate to have family and friends who are actively involved. Set clear boundaries with them as well. Let them know your employer is the one who tells you how and when to do something.
- Always be respectful and calm, even when your employer isn't. You're still a professional. You are held to a high standard as a homecare or personal support worker, even if you are a family member. You and your family member may have always communicated in a less than respectful way. As a homecare or personal support worker, however, you are expected to communicate professionally. If not, you can be accused of verbal or emotional abuse and may not be allowed to work as a Medicaid provider.

When setting boundaries, be clear, calm, firm and respectful. You are not being rude or selfish by setting boundaries and there is no need to apologize for doing so. It's for you and your employer's protection. Respecting your employer's boundaries is just as important.

If you aren't sure if something crosses a boundary, ask yourself:

- Is this in my employer's best interest?
- Whose needs are being served?
- Will this have an impact on the services I am providing?

- How would others view this?
- Am I treating this person differently from other consumers?

## Ideas of what to say during difficult situations

"I am paid by the state to do certain tasks and I could lose my provider number if I don't do them or do something different. If you wish to change my assignments, let's talk to the case manager/personal agent."

"I'm concerned that I could be injured doing this activity, and I'm not covered under my Workers Compensation plan if it is not on my list."

"Tell me more about what you want or need done. Maybe I can help you find a solution. Or your case manager might know of other resources. If you know someone else who could do this, would you like my help in asking him or her?"

"I'm not sure that is something I can do/accept under the state rules. Let me talk to someone at the office or brokerage before I say yes."

"I don't want to mix up our friendship with my work relationship, and I'm concerned that if I do what you ask, it would cross the line."

"I don't want to put you in the position of helping me out with something. We might both regret it someday, and I don't want to ruin our working relationship."

"I'm not able to accept this (gift/money), but I'd be happy to help you find a charity if you'd like to donate it."

"Rather than giving me (gift/money), I would appreciate using you or your family as a reference to get other jobs."



## Exercise:

### Does this cross the line?

Consider whether the following scenarios cross the line in terms of professional boundaries.

1. Every Thursday, your employer goes to the neighborhood pub for “open mic” and to hang out with friends. Your job description (or task list) includes helping with transportation and personal care at home and in the community. When you arrive at the pub, your employer asks you to join in with his friends and offers to buy you a snack and a drink.
2. A new action movie has just come out that you have been waiting to see on opening day. You are scheduled to work. Your employer doesn't like going to movie theaters. You convince him to go anyway by promising him popcorn and candy.
3. Your regular work schedule is Monday through Friday from 8 a.m. – noon. Most days of the week, you finish all your tasks by 11:30 a.m. Your employer has told you to claim all the hours on your timesheet since you are such a good worker, so you do.
4. You have been helping people in their own homes for many years. You care about people and want the best for them. You often work with people who don't tend to make the best decisions about their health or the way they live their lives. You believe you know what's best for them. You have found that people tend to be easily overwhelmed when it comes to making decisions about their health, finances and in-home services. You are working for a new employer, Mike, and have asked your employer's case manager to correspond with him only by email and only come to the home when you are there. You go to all of Mike's medical appointments and, when he is in the hospital, you tell the nurses to make sure to call you before any decisions are made about his health.
5. Grocery shopping is one of the tasks you are paid to help your employer do. She really likes to go and it helps her stay independent, but she gets very tired and has to sit down a lot. It takes twice as long to do the grocery shopping when she goes with you. You suggest that you do the grocery shopping without her. When she asks how to pay for the groceries if she isn't there, you suggest having your name added to her checking account.
6. You and your employer, Maggie, have been working together for the past year and have grown very close. In fact, she reminds you of your mother and she thinks of you as a daughter. You've been having some problems at home lately. Maggie is the first person you call when you are having a bad day and need to vent. You've been talking to her a lot at work about your problems and you even call her on days you aren't working. Maggie is getting very concerned.
7. Your employer has been complaining that he hasn't been sleeping well because he has been coughing a lot. He was thinking about calling his doctor. You remembered that you have some prescription-strength cough medicine at home that worked for you when you had a similar cough. You tell him to wait to call his doctor and see if your cough medicine works for him, especially since it will save him money.

## Important things to keep in mind based on the scenarios

- **Never** drink alcohol on the job. It is also not appropriate for the consumer to purchase food or beverages for the worker in any circumstance, even if he or she offers or insists.
- Homecare workers do not have community inclusion as a task, but personal support workers do. So going to a pub could be in the work plan. If the employer needs support in paying his bill, or performing at the “open mic,” for example, then it would be appropriate for the worker to sit near him. The employer should have freedom in developing relationships in the community with his friends, so the worker shouldn’t “hover” or join in as a friend. It’s important to keep a professional relationship.
- Workers should remember they are there to assist and support, not direct. Personal support workers may help consumers reach their goals, which do include navigating their “world,” but can sometimes go too far with instruction. Also, taking the employer along on an activity that is for the worker’s benefit is inappropriate to be used as community inclusion or to charge for that time (E.g., the worker taking the employer to a union meeting or to a social gathering with the worker’s friends).



- **Never** give medical advice. Consumers see the worker as part of the care team and may give more importance to what the worker says than if it came from just a friend. So workers must be careful to not offer an opinion. Also, people on state services often have other medical conditions, are on a variety of medications, etc. All treatment decisions should be left to licensed medical personnel. Workers could be liable for the consequences of a bad recommendation. Workers should not assume they know is the best thing to do. It’s also against the law to let someone else use your medication.

# Confidentiality

Confidentiality means keeping information about your employer absolutely private. You may not share information with anyone, including the person's family and friends, unless you have your employer's permission.

Your employer's personal information may include:

- Name, age, address or physical description;
- If receiving state assistance;
- Type of help needed;
- Any information about finances;
- Medical or health issues;
- Relationships, religion or interests

You may have good intentions for sharing information. For example, you may ask your church congregation or

friends to pray for your employer or you may tell your employer's daughter what's happening in the home if something concerns you. Unless you have permission, this is not OK. Violating confidentiality can result in a negative outcome for all involved:

- Your employer could be embarrassed or humiliated.
- Other people could use information you shared about your employer to harm or take advantage of him or her.
- Your employer could lose trust in you.
- You could lose your job with your employer.
- You could lose your eligibility to work as a provider in the Medicaid program.



## Exercise:

### Does this violate consumer confidentiality?

1. You are at the unemployment office:

“What are the names and addresses of all the people you worked for through the state in the past three months? We need that to process your claim.”
2. Asked by the case manager/personal agent:

“Have there been any changes in Bill’s appearance or activities in the last few months? Tell me what you’ve noticed.”
3. Asked by the parent of your employer’s friend:

“I see that Joe uses an electronic tablet. Did he get that paid for through his Brokerage? What did you say to get that to happen? Our personal agent always turns us down for new things.”
4. A friend of yours at the grocery store:

“Hey, I hear you’re working for Mike Santiago. How is he doing these days? He was my favorite teacher in high school and I hate to think of him going downhill. Can I do anything to help him out?”
5. Your employer’s neighbor:

“You help Mike, don’t you? I am looking to hire someone to help me with housekeeping, bathing, and making meals. Are you available?”
6. While in the community, you take a video and pictures of your employer on your phone and post it to your social media account.

## Important things to keep in mind based on the scenarios

- Staff with the Employment Department may ask you for information about your employers as a homecare or personal support worker. Although they may need the information to process your claim, do not provide employers' names. Instead, direct the Employment Department to the local office and they can verify that you have received payments from the State for helping consumers.
- You can share pertinent information with the case manager, personal agent or service coordinator about your employer's condition and changes in abilities, but it is best for the employer to speak on his or her own behalf. It's best to share only when the employer knows about it, has asked you to do it, or you feel your employer is not following through with sharing the information himself, particularly if there is a safety concern. You may decide to share with the case manager, personal agent or service coordinator without your employer's knowledge if there are employment concerns you are uncomfortable talking to the employer about (e.g., being asked to do something not on your task list, challenging behaviors, safety issues in the home).
- Do not share how an employer obtains services or tools. Each person's plan is different. It is inappropriate to share what is covered or how someone spends their money – whether it is state funds, personal finances, trust funds or a gift.
- Acknowledging you work for a specific employer may indicate that he or she is on state services and/or has personal care needs. Remember, this is private information. If the person is asking because she wants you to work for her, change the subject to your availability and what type of things you can help her do.
- Taking videos and photos of your employer violates confidentiality and can even jeopardize his or her safety.



# Roles and responsibilities

It's important to understand your role and responsibilities as a worker. This ensures you are doing everything you need to do to be a career homecare or personal support worker and to be successful in your position.

Your role is to help those you support to achieve and maintain their well-being and independence through opportunities that protect, empower, respect choice and preserve dignity.

You are responsible to:

**Follow program rules.** Read your enrollment agreement carefully and make sure you ask questions if there is something you don't understand.

**Ask questions to make sure you get all the information you need to do the best job you can.** Before you start working with someone, it's important to make sure you fully understand your job so there are no surprises. It is OK to ask questions.

**Know what is on your task list/job description.** Before you start working for someone, make sure you know what is on the task list or job description. You want to make sure you have enough information and feel comfortable doing the tasks. If you don't, make sure to let your employer and his or her case manager, personal agent or service coordinator know. If it is on your task list or job description, you have accepted the task and you are responsible for providing all the services you are authorized to do.

**Follow your task list/ job description.** Stick to your task list, job description or service plan. Know what you are paid to do and not do. If your employer asks you to do something that is not on your work plan, you are not authorized to do it.

**Keep track of the days and hours you work.** It is your responsibility to track the days and times you are authorized to work and to accurately bill for the time. Consider using a calendar at your employer's home and that you both initial after you work each shift. Remember, claiming hours you didn't work is a crime.



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**Immediately report abuse or suspected abuse of a child, senior, or person with a disability by calling 1-855-503-7233.** As a homecare or personal support worker, you are a mandatory reporter. This means you are legally responsible to report abuse or suspected abuse.

**Be your own advocate.** Being your own advocate means you speak up for what you know is right and what is important to your own health, safety and well-being. You have the right to be treated with dignity and respect, as well as set and maintain boundaries. This is true for your employer as well. Being your own advocate as a homecare or personal support worker is about knowing your limits, saying “no” when you mean “no,” and not doing something you don’t feel comfortable doing. **Do not confuse being an advocate for yourself with doing something that serves your own interests instead of what is best for your consumer.** Examples include asking for your employer’s service hours to be increased even though his or her needs haven’t changed; asking your consumer to change the schedule because it works better for you; or convincing your employer to do an activity that you prefer rather than something that helps them meet your employer’s goals.

**Know your limits.** It is important to know your strengths and know where you need to improve. Before you agree to do to a task, consider whether you have the skills, knowledge, and abilities required to do it safely. Some tasks you help with may be easier than others and do not require a lot of experience, like housekeeping or grocery shopping. Making a mistake while housekeeping is not as critical as making a mistake with someone’s medications or ventilator care. If there are areas you would like to improve, make sure to ask for the training and information you need in order to be successful.

It is also important to know your limits around what you will or will not do. Referring to your task list or job description is a good place to start. They are intended to let you know what you are authorized to do and for whom. If something is not on your task list or in your job description, you are not authorized to do it. For

instance, if providing transportation is not an authorized task, don’t do it. Encourage your employer to talk to his or her case manager, personal agent or service coordinator to see if it can be added to the plan. You are not authorized to help other people in the home. For instance, your employer’s family member may ask you to do a load of their laundry or make them a meal since you are already doing it for your employer.

Know your emotional limits and triggers. If possible, avoid situations that you are difficult for you. Something that causes you a lot of distress may not bother someone else. This could include certain personalities, how someone communicates, the physical environment or someone’s specific condition. For instance, an employer may have a terminal illness that reminds you of when a loved one passed away, and you find yourself frequently crying and feeling down at work.

**Say no.** Saying “no” is not an act of defiance. It isn’t something you have to apologize for saying, especially if what you are asked to do violates your principles, ethics, or the law. “No” is a complete sentence. If you say “no,” do so calmly and respectfully.

**Don’t do a task that makes you feel uncomfortable.** As an example, your employer could ask you to help with insulin injections. If you haven’t received “nurse delegation,” you could be fined for practicing nursing without a license. Another example is you may be asked by your employer to crush medication, but the bottle clearly reads not to crush and it would be unsafe to do so. Respectfully decline and encourage your employer to speak with his/her physician or pharmacist to talk about options. Another example is being asked to throw used needles in the garbage can. This is illegal. They must be put in a sharps container, which is a red container designed for needles and other sharp objects. Respectfully let your employer know this is not safe and you are not willing to do it, but you can help him or her get in touch with the garbage company or pharmacy to get a container. Your employer may ask you to lift him or her instead of using the equipment needed for a safe transfer. This puts both you and the consumer at risk.



**Ask for help if you don't know what to do.** If you don't know what to do or how to do it, ask. Start with your employer, who is responsible for training you on how he or she would like things done. Ask for direction and additional training if you need it. It's better to ask ahead of time before doing something that can potentially harm yourself and your employer because you weren't sure what to do. Talk with your employer's case manager, personal agent or service coordinator to help you with problem solving, especially if you think durable medical equipment or a nursing referral is needed.

**Communicate your concerns.** Start by talking with your employer. Use statements, such as "I've noticed a change in your ability to stay alert when you don't take those pills." Use suggestions, such as "This is the kind of thing you doctor might want to know. It might be a good idea to give him a quick call." Try avoiding statements, such as "You should call or you have to call" because it can put your employer on the defensive. Follow up with your employer in a day

or two to see if your employer spoke with someone. If you are still concerned, say something like, "Your well-being is very important to me and I'm worried. Is there a way I can help?" You can let your employer know you are concerned and offer to help identify solutions but, ultimately, it's up to your employer.

Keep in mind, unless you have permission from your employer, you cannot release information to anyone. This includes your employer's family members or physician. You can contact your employer's case manager, personal agent or service coordinator to request follow-up. Case managers and personal agents usually have employers sign a release of information about whom the case manager can talk to about the employer.

If there is a medical emergency, you can call 911. You are also a mandatory reporter, so if your concern is about abuse or neglect, you must report it.

Give your employer advance notice if you can't work or will be late. This is not just a common courtesy, it is critical. Your employer may need help at specific times and relies on you to be there. Call soon enough so your employer can make other arrangements for help.

**Arrange schedule changes or absences with your employer.** Your employer ultimately has to approve schedule changes or absences. This includes switching shifts with a co-worker. Just like in other workplace settings, your employer is your boss.

**Report work related injuries right away to the Workers' Compensation coordinator with the Oregon Home Care Commission.**

Call 1-888-365-0001.

**Update your information in the Registry every 30 days so that you are available for referral.** If you do not want to be on the referral list because you are not looking for work, change your status to "Not Currently Looking." Don't put that you are "Available for Referral" on the Registry when you really aren't. You can change your status anytime. **If consumers leave you a message, return their call right away, even if you aren't accepting more work.**



# Handling money, personal property or gifts

Any time you are involved with money, make sure you document everything. You never want to put yourself in a position where you can be accused of wrongdoing, especially when you are just trying to help. Keep boundaries in mind when it comes to money, property or belongings. If it involves your employer, best practice is not to involve yourself. This can even include buying something from your employer that he or she is selling. You never want to put yourself in a situation where you can be accused of financial misconduct or financial abuse. These are serious allegations that can result in your being unable to work as a Medicaid provider.



## Important things to remember

- Always document on the Cash Record Form any time you shop or handle any money for your employer.
- Make sure to get receipts and review them with your employer after you go shopping.
- If your employer asks you to help with finances or money management, ask your employer's case manager, personal agent or service coordinator to see if there is someone who can provide assistance.
- If possible, ask your employer to go with you to the grocery store to pay for groceries or even consider a grocery delivery service.
- If your employer uses an Oregon Trail card to purchase groceries and asks you to help, you can request a card in your name on their account. If you use your employer's card, it is seen as fraud.
- Do not accept money or gifts from employers.
- Do not manage an employer's bank accounts.
- Do not deposit or withdraw cash unless your employer is with you at all times during the transaction.
- Avoid offering financial advice.
- Don't buy anything from your employer or sell anything to your employer.
- Never sign your employer's name.
- Do not make loans to or on behalf of your employer.
- Do not act as your employer's representative payee, power of attorney or conservator.

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# Progress notes

Personal support workers are required to submit progress notes with their timesheets. Notes should:

- Be objective and factual;
- Be free of judgement or your opinion;
- Clearly explain how you helped your employer meet his or her goals as outlined in the ISP, service agreement or job description.

You can find helpful information and examples on the Personal Support Worker Resources website at: [www.oregon.gov/DHS/SENIORS-DISABILITIES/DD/PROVIDERS-PARTNERS/Pages/psw-resources.aspx](http://www.oregon.gov/DHS/SENIORS-DISABILITIES/DD/PROVIDERS-PARTNERS/Pages/psw-resources.aspx).

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# Conclusion

*“If you find it in your heart to care for somebody else, you will have succeeded.”*

–Maya Angelou

Everyone at the Oregon Home Care Commission wants you be successful. We are grateful you have decided to be a professional homecare and personal support worker. You may want to read this guide from time to time as a refresher. Please consider attending all Home Care Commission-sponsored trainings.



This document can be provided upon request in an alternate format for individuals with disabilities or in a language other than English for people with limited English skills. To request this publication in another format or language, contact the Oregon Home Care Commission at 877-624-6080.