

Personal Assistant:
Your Toolkit



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Introduction to Purple

Purple is a provider for Direct Payment holders and we provide a Personal Assistant (PA) employment support service. Purple also provide a payroll service and Employment Advice and Guidance (EAG), including support with recruitment and retention of PAs.

Purple is the successor organisation to **ecd**p (Essex Coalition of Disabled People). Purple is a new organisation, with a new corporate team, and fresh vision: to change the conversation on disability from one of disadvantage, to one of value. Purple provides new and innovative support services to disabled people as well as an offer to businesses to support them to become disability confident. You can find out more about Purple here: www.wearepurple.org.uk.

Purple can support Personal Assistants (PA's) with:

- Advice and Guidance around being a PA
- Purple Match – Sending alerts to PA's who have joined Purple Match, with any new PA positions that have become available.
- Payroll service – Only If your employer has chosen to use Purple as a payroll service.

As well as delivering the service via more traditional means, Purple are working to provide a range of self-serve and digital options, including a portal where Customers will be able to submit your timesheets and invoices.

Our Employment Advice and Guidance Service

We have produced a toolkit to help you on your journey as a PA. The toolkit provides you with information and acts as a reference document. We have tried to make the toolkit as practical as possible and not use any jargon. The aim is to provide you with all the information you need as a PA whether the Customer support is funded through a Direct Payment (DP), a Personal Health Budget (PHB) or private funds.

This toolkit is not about replacing the service we provide – but hopefully complementing it, giving you the confidence to make the most of your role as a PA. This toolkit also aims to support you in your role as a PA and provide you with information and guidance and the tools to enhance your role. If you have any questions, please contact the EAG Team on 01245 392300

Compliments and Complaints

At Purple, we are always keen to improve the service we provide to our Customers. Should you have any feedback, positive or negative, we would like to hear from you – please contact our customer services team on 01245 392300. For more serious matters, we also have a formal Complaints and Compliments Policy and Procedures in place this is available on our website – <https://wearepurple.org.uk/direct-payment-support/>

What is a Direct Payment?

A direct payment is a sum of money awarded by the local authority or continuing health care (NHS) to a person who has been assessed as needing help from social services or the NHS, and who would prefer to arrange their own care, therefore giving them choice, independence and control, instead of receiving support services managed by and provided from the local authority or NHS.

Different types of Direct Payments

Individual Adult Direct Payments – enables the Direct payment user to employ PA's to provide them with the support they require at home giving the option to choose a PA or a Care Agency who they feel may be suitable to meet their needs. This is opposed to having care provided by an individual or company not chosen by the Direct Payment user.

Individual Children's Direct Payments - This enables the family to employ a PA to provide children with the possibility of expanding their world and providing parents with free time to spend with other children within the family and empower the family to be creative in finding ways to meet the needs of the disabled child.

Carers Direct Payments – This is money given someone who is providing unpaid support to the cared for person, this could be a Husband, Wife, family member, caring for a loved one full time. A carers direct payment would enable this unpaid person to employ PA's to provide support to the cared for person so that the unpaid person can have some time and freedom to carry out activities of their choice, giving them a break from their caring role.

Direct Payments to provide respite - this enables families and individual Direct Payment users to have time to have a break from their normal routine but with the support they require to meet their needs. Respite can either be provided at home using PA's or a Care Agency or a direct payment user may choose to go and stay in a residential placement of their choice.

What is a Personal Assistant (PA)?

A PA works directly with one or more individuals, to support them with various aspects of their daily life so that they can live it in a way they choose. They're usually employed directly by a person who needs care and support, and who manages and pays for this through a Direct Payment, Personal Health Budget or with their own money. This person is their employer (and are often referred to as a customer). They can also be employed by a family member or representative, when the person they're supporting doesn't have the physical or mental capacity to be the employer.

The Role of a Personal Assistant (PA) can be quite varied, it is important to be motivated, with a positive character, respectful and have good listening skills.

A PA can make a huge contribution to the health and wellbeing of disabled people living in the community by:

- supporting an individual employer at their place of work or education
- to maintain relationships with family and friends, including supporting them with childcare
- to meet new people and develop new friendships
- to get about in the community, by providing transport, driving their car or using public transport

- to maintain hobbies and interests, like going to the cinema, gigs, swimming or going on holiday
- by providing personal care, including support to dress, wash and bathe
- to communicate their wants and needs
- by carrying out household tasks like cooking, cleaning, meal preparation, shopping, organising paperwork, and, in some cases, pet care
- by going with them to their hospital and other appointments
- to recover their mental health by helping to manage their anxiety about going out
- to become healthier after a physical illness, for example, through a better diet or more exercise
- to develop a new skill or get a job.

Not all Personal Assistants will be employed to carry out all these tasks – it may be that your employer wants support with just one of these tasks. Quite often the role can be about companionship and having a shared interest in things like music, politics or sport.

Being a PA can be an extremely rewarding role for the following Reasons

- Job Satisfaction
- Flexible working hours
- Varied roles depending on employer
- Good rates of pay and conditions
- Enhancing the lives of others

Do you have the key skills to become a PA?

- good listening skills
- good interpersonal skills
- the ability to be personal yet professional
- good written and verbal communication skills
- the ability to treat people with dignity
- helping people to live their life in the way that they choose
- supporting others to make a real change to their life
- comfortable working on your own and as part of a team
- the ability to develop a strong, trusting relationship

What is the role of a PA?

The role of a personal assistant is extremely varied and no two jobs will ever be the same. This is because the individual employer can choose exactly how they want you to support them. As a personal assistant you may be supporting an individual employer:

- at their place of work or education
- to maintain relationships with family and friends, including supporting them with childcare to meet new people and develop new friendships
- to get about in the community, by providing transport, driving their car or using public transport helping people to live their life in the way that they choose

- to maintain hobbies and interests, like going to the cinema, gigs, swimming or going on holiday comfortable working on your own and as part of a team
- by providing personal care, including support to dress, wash and bathe
- to communicate their wants and needs
- by carrying out household tasks like cooking, cleaning, meal preparation, shopping, organising paperwork, and, in some cases, pet care
- by going with them to their hospital and other appointments
- to recover their mental health by helping to manage their anxiety about going out
- to become healthier after a physical illness, for example, through a better diet or more exercise
- to develop a new skill or get a job.

Some personal assistants may carry out, with adequate training, certain health care related tasks. Not all personal assistants will be employed to carry out all of these tasks – it may be that your employer wants support with just one of these tasks. Quite often the role can be about companionship and having a shared interest in things like music, politics or sport.

Support that personal assistants provided their employer with:

Source: Skills for Care survey, 2020

Personal care - 68%, Household duties – 67%, Mobility/moving and assisting - 65%, Socialising with friends or family - 61%, Taking medicines - 55%, Eating and drinking - 53%, Other - 26%, Communication - 52%, Mental health - 31%, Supporting with behaviours which challenge - 28% Intellectual disability - 23%, Particular health needs – 18%

Who can be a PA?

When employing a personal assistant, individual employers often look for someone who is a good personal fit. It's not always about previous experience and qualifications – what's really important is that you have the right values and skills to do the job.

Anyone can be a personal assistant as long as they have key values:

- a 'no assumptions' attitude
- responsible and reliable
- respectful
- encouraging and enabling
- understanding and empathetic
- flexible
- committed to equality and diversity
- understand the challenges faced by disabled people
- willingness to learn
- Enjoy working with individuals and can support that person to live their life in the way that they choose.
- Make a difference and support others to make a real change to their life
- Feel confident working on your own or with other Personal Assistants
- Have the ability to build a strong trusting relationship with others
- Understand that you are the employee and take direction from your employer

How do I find a Job as a PA?

Purple not only advertise for PA positions but we also have a PA register for you to join where we can send you alerts when a new positions become available.

You can find current positions being advertised on our website Where you will also find the link to join the PA register.

Understanding the role - It is important that you understand the role before you apply as being a PA can involve different tasks. The individual employer will have an idea of the type of person they're looking for and an outline of what they want them to do. This will usually be set out in a job description.

Before applying for a job, read the advert and job description carefully so that you're clear about the tasks you're going to be asked to do. It's important to make sure you can do them all, because, for example, there would be no point in applying for a job that involves going swimming twice a week if you don't like water.

Your employer's needs could change over time or even day to day, so it's important to review the job description regularly to make sure that everything works well between you and your employer. As a personal assistant it's important to be flexible, however if you feel you're asked to do anything outside of what you expect, it's vital to have a conversation with your employer to clear up any issues and continue a good working relationship.

Applying for the job - When applying for the job, you will be asked to provide a CV (curriculum vitae - a written overview of your skills, experience and qualifications), so that the individual employer can find out more about you and your experience. If all goes well, you should be invited to an interview, so that they can meet you and get to know you better. The interview may be very informal and could be held at a different location to where you'll be actually working. During the interview remember to be yourself, talk about relevant experience and qualities and be prepared to ask questions. The National Careers Service has interview hints and tips on their website. After the interview you should be contacted to let you know if you were successful or not. If you haven't heard anything after a few weeks, contact the person who interviewed you. If you weren't successful, you may want to ask for feedback to help you with future interviews. If you're successful, you should then agree a start date, and you may be provided with an employment contract, so that you can be sure of what the job involves.

Checks and references - It's strongly recommended that employers carry out recruitment checks on potential personal assistants before offering a contract. So if you're offered the job, your future employer will likely want to carry out some checks. These may include references, Disclosure and Barring Service (DBS) (formerly known as CRB) and right to work checks. You should bear this in mind when applying for jobs and be prepared to give names of former employers and/or character references. You may also need to provide forms of identification as specified by the Disclosure and Barring Service or the Home Office.

Probationary Period

This is a two-way trial period that gives both you and your new employer a chance to get to know each other, and to make sure that you're suited to the job without committing yourself completely.

Your new employer should set the probationary period, for example three months, and may want to meet with you during that time so you can both talk about what's working well or not going so well.

They may also use this an opportunity to talk about any training that you need.

Induction

Induction is an introduction to everything related to the job you'll be doing and the environment in which you'll be working. It will usually be carried out by your employer and could be as simple as turning up on your first day and being guided through what to do and what's expected of you. It's about getting to know each other and developing your working relationship.

An induction will help you settle into your role quickly and can also be the start of your ongoing learning and development.

Your induction will be determined by the tasks you'll be expected to do, your working environment and your employer

Contract of Employment

Your employer should provide you with an employment contract. An employment contract is important because it's an agreement between you and your employer, and sets out your employment conditions, rights, responsibilities, duties and things like holidays, notice period, how to deal with a grievance, disciplinary procedures and sick pay. If your employer doesn't provide you with a contract, you should ask them for one. Purple's 'Having a personal assistant' toolkit shows you the information that your employer should provide, and there's a template contract of employment within this toolkit for your employer to use. The contract can be a useful tool for sorting out any disagreements or disputes, as it's a record of what you and your employer have agreed and can be used to clear up any misunderstandings.

Managing your working relationship

As a personal assistant you'll have a unique relationship with your employer. You're supporting them to do the things they're not able to do and although this can feel like a personal relationship, it's not. Remember you're the employee and you need to remain independent and professional. It's important to understand the impact that certain circumstances may have on your employer, for example, if you don't or can't turn up to work. There are times when being a personal assistant could be personally difficult or emotional, particularly if it involves working with a person at the end of their life. It may feel like you're supporting your employer's family as well. As such, there may, from time to time, be problems with the relationship between you and your employer. Any problems should be addressed properly and as laid out within the terms of your employment contract. You should discuss how issues can be addressed early on in your relationship with your employer.

Performance appraisal or supervision

Your employer may want to meet with you regularly (for example, once a month) to talk about how you're doing in your job. It's a two-way discussion and gives your employer a chance to assess whether you're working in a way they want, to give constructive feedback and it gives you both time to address any problems and find solutions. It may also include discussions around your learning and development. Your employer should keep a record of your discussions.

Health and safety

Because your employer's home will be your place of work, it's their responsibility to ensure you have a safe place to work, and they may carry out a risk assessment. You should speak with your employer about any risks or hazards that you've noticed. It's also your responsibility to make your employer aware of anything that may impact on your health and safety, for example, pregnancy in a job that requires heavy lifting. Your employer should keep a record of your discussion, especially

in relation to risks and hazards. It's good to keep an accident/incident book, so that anything out of the ordinary can be noted down. Your employer would also need to provide you with any training you may need, your employer can access funding for training via skills for care.

Lone working

Being a personal assistant may mean you work alone with your employer, which is often referred to as 'lone working'. It's important to be aware of your safety and that of your employer.

It's advisable for your employer (or someone supporting them) to carry out a lone working risk assessment to identify any risks, and ensure that actions are put in place to minimise/mitigate these risks. You should make sure that somebody knows when and where you're working at all times, and that you have an emergency contact.

Safeguarding

Abuse is a violation of a person's human and civil rights by any other person and is never acceptable. If you suspect abuse of any kind you should tell someone immediately.

This may be: A single or repeated act, a physical, verbal, psychological, sexual, institutional, discriminatory or financial, or an act of neglect or failure to act.

Some examples may include: Lack of personal care, being stopped to attend a medical appointment, injuries, threatening to get access to your money or Will, being kept from your usual network of family and friends etc.

If you have questions about safeguarding or feel that you or someone else is being abused, you can speak to any of the following people;

- The Police on 101 (or 999 in an emergency)
- The Local Authority Safeguarding Team
- A trusted family or friend
- Your family Doctor
- A local support organisation

Please see further details in our helpful links section.

The most important thing to remember is to talk to someone about your concerns – you can always contact Purple

Confidentiality

Confidentiality is important for both you and your employer. Your employer will hold confidential information about you and you'll have access to personal information about our employer.

You should discuss, with your employer, who you can share information with, for example, their doctor, and under what circumstances. No information should be shared with anyone against your employer's wishes. This includes sharing personal information about your employer on social media, such as Facebook or Twitter. However, in extreme circumstances, for example a medical emergency, or if you feel there's a safeguarding issue, then you may have to share personal information without your employer's consent. Confidential information should always be kept securely so that other people aren't able to access it.

Core Training suggested

- Safeguarding for adults and Children – This Training will provide Carers with the skills to identify if abuse is taking place and how to report any suspected abuse or concerns.
- Manual Handling – This training will provide Carers with the skills and the knowledge of equipment to know how to safely move or lift an individual.
- Health and Safety – This training will provide Carers with an understanding around how to maintain a safe work environment, to reduce negligence, accidents and incidents and to ensure the safety of the employer and any visitors.
- First Aid – This Training will provide the Carer with an understanding of the role of a first Aider and provide key skills that can be applied in various emergencies, such as minor injury, choking, unresponsive person breathing or not breathing normally.

Training requirements would be dependent on the role of the PA, however, your employer can apply for funding to enable you to undertake any training required.

Training courses can also be an excellent way of meeting people who do a similar job to yourself. It's also an opportunity to seek advice from the person carrying out the training. Speak to your employer or local support organisation about training.

Free online Safeguarding Training

Safeguarding Adults - <https://www.essexsab.org.uk/>

Safeguarding Children - <http://www.escb.co.uk>

DBS Check

A DBS is the Disclosure and Barring Service which helps employers make safer recruitment decisions. There is a barred list for both adults' and children's and makes considered decisions as to whether an individual should be included on one or both lists and barred from engaging in regulated activity.

It is crucial to have a DBS when working with vulnerable adults and is mandatory when working with Children.

Purple can support you with the DBS process and so please speak to your employer.

Working hours, time and breaks

PA's are entitled to:

- A minimum of 11 consecutive hours in a row rest in any 24-hour period
- A minimum of a 20-minute break if they are working longer than 6 hours
- A minimum of 1 day off each week, which is 1 day off out of every 7

PA's should not work more than 48 hours each week, however, if you are required to work more than 48 hrs per week, you would need to sign a disclaimer stating that they are happy to work more than this in extreme circumstances but working more than 48 hours each week should not be the 'norm'.

Top Tip

See the ACAS website for more information and to download a useful booklet on working hours.

Rate of pay

It is up to your employer to decide how much your pay will be, and Purple can support your employer in making this decision, using a wage calculator to ensure the employer budgets accordingly to allow for other associated costs when employing PA's.

Your employer may decide on an initial rate of pay and increase the rate on successful completion of a probationary period.

Sickness pay

Any Employee who is unable to work four or more days in a row (including non-working days) due to physical or mental illness or disablement, and have told the employer that they are sick within the terms of their contract, may be entitled to SSP.

From April 2021, you must be earning an average of £120.00 per week before tax to be eligible for SSP. If you are eligible for SSP, this is £95.85 a week, for up to 28 weeks.

Linked periods of sickness - <https://www.gov.uk/statutory-sick-pay/eligibility>

If you have regular periods of sickness, they may count as 'linked'. An Employee is no longer eligible for SSP if they have a continuous series of linked periods that lasts more than 3 years.

To be linked, the periods must:

- last 4 or more days each
- be 8 weeks or less apart

Holiday pay

You are legally entitled to a minimum of 5.6 weeks of annual leave per year pro rata (this is inclusive of Bank Holidays). If you work part-time or flexible hours, it may be easier to calculate your holiday allowance in hours. For example, if you work 10 hours per week, you are entitled to 56 hours of annual leave in total (including the Bank Holidays). If your employer uses Payment Services from Purple, their Payment Services Account Manager can support the Employer if you have any questions.

PAs should be advised at the start of their employment that they need to take their annual leave, or they will lose it at the end of the leave year.

Top Tip

See the GOV.UK website for a holiday entitlement calculation tool.

Maternity leave

If you have been employed for at least 26 weeks and become pregnant, it is likely that you will be entitled to maternity pay. In order to receive maternity pay, you will need to provide your employer with a MATB1 form.

Employees can take up to 52 weeks for Statutory Maternity Pay (SMP), however only 39 weeks are payable. For the first six weeks, it is paid at 90 percent of the average weekly earnings. The following 33 weeks will be paid at the SMP rate or 90 per cent of the average weekly earnings, whichever is the lower. The SMP rate from April 2021 is £151.20 per week.

Paternity leave

If your partner is having a baby, you are entitled to two weeks paid leave. This must be taken in one go, cannot start before the child is born and you should be given at least 28 days of notice of their intent to take paternity leave.

Statutory Paternity Pay (SPP) for eligible Employees is either £151.20 a week or 90% of their average weekly earnings (whichever is lower). Tax and National Insurance need to be deducted.

Adoption pay

Statutory Adoption Pay (SAP) for Employees is:

- 90% of their gross average weekly earnings for the first 6 weeks
- £151.20 a week or 90% of their average weekly earnings (whichever is lower) for the next 33 weeks

Tax and National Insurance need to be deducted.

Redundancy pay

Employees will normally be entitled to statutory redundancy pay if they have been working for an Employer for two years or more.

Employees will receive:

- half a week's pay for each full year they were under 22
- one week's pay for each full year they were 22 or older, but under 41
- one and half week's pay for each full year they were 41 or older

Length of service is capped at 20 years and the weekly pay is capped at £544.

Pensions

By law all Employers must provide a Pension Scheme for their Employees. There are specific rules for different types of workers but if your Employee is over 22 and earns above £10,000 each year you will need to have a Pension Scheme and make contributions towards your Employee's pension. Employees can opt out, but this must be in writing. Employees earning less than this amount have a right to join a scheme if they request it. You can get further information on pensions and your obligations from the Pension Regulator's website – <https://www.thepensionsregulator.gov.uk/en/employers>.

Self-employed Personal Assistants

If you are self-employed, the HMRC advise that employment status is established by the particular terms and conditions under which a person works. A PA could be self-employed if they look after their Customer in the PAs own home, they have more than one Customer, they have a business structure in place and are responsible for the success or failure of that business. However, where the PA provides the care in the Customer's own home they are likely to be an employee of the Customer.

Use the link below to find out if you should be classed as employed or self-employed PA for tax purposes - <https://www.gov.uk/guidance/check-employment-status-for-tax>.

If you meet the status of a self-employed PA and are registered with the HMRC, The person you are providing support to is NOT your Employer therefore you are contracted to provide a service. It is your responsibility to:

- Have your own Public Liability Insurance
- Have a current DBS/fund your own DBS
- Supply your own equipment that they require to complete their work, such as gloves and aprons
- Making their own Tax and NI contributions to the HMRC
- Undertaking their own training
- Agreeing/negotiating their hourly or weekly rates with the person they are providing support to.
- If they are unable to work, they should supply a replacement person, although you do not have to accept this person
- Do not get holiday pay or statutory sick pay
- Should supply a Self-employed Registration Number
- Should submit invoices in a suitable format, subject to the current HMRC rules, for self-employed persons

Top Tip

See the GOV.UK website for additional information –

<https://www.gov.uk/employment-status/selfemployed-contractor>

Find out a person's employment status –

<https://www.gov.uk/government/organisations/hm-revenue-customs/contact/status-customer-service-team>

Helpful tools and useful links

Holiday entitlement calculator

<https://www.gov.uk/holiday-entitlement-rights>

DBS

<https://www.gov.uk/dbs-check-applicant-criminal-record>

PPE Hub

<https://www.gov.uk/government/collections/coronavirus-covid-19-personal-protective-equipment-ppe>

HMRC

<https://www.gov.uk/government/organisations/hm-revenue-customs>

National Career Service

<https://nationalcareers.service.gov.uk/careers-advice/interview-advice>

Skills for Care – Working as a PA

<https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Resources/Working-as-a-PA/1.-What-is-a-PA/Being-a-personal-assistant/Being-a-personal-assistant.pdf>

The Care Certificate

<https://www.skillsforcare.org.uk/Learning-development/inducting-staff/care-certificate/Care-Certificate.aspx>

ACAS (Advisory, Conciliation and Arbitration Service)

Provides free and impartial information and advice to Employers and Employees on all aspects of workplace relations and employment law – online helpline.

www.acas.org.uk Telephone: 0300 123 1100 Relay UK: 18001 0300 123 1100

Citizens Advice Bureau (CAB)

UK network of independent charities that give free, confidential information and advice to assist people with money, legal, consumer and other problems – ‘find your local CAB’ search.

www.citizensadvice.org.uk

Crimestoppers

Independent charity helping law enforcement to locate criminals and help solve crimes – facility to report crimes anonymously.

www.crimestoppers-uk.org Telephone: 0800 555111

GOV.UK

The place to find government services and information.

www.gov.uk

HMRC

UK's tax, payments and customs authority – online tools available to help Employees.

www.hmrc.gov.uk Telephone: 0300 200 3300

Skills for Care

Practical tools and support to help adult Social Care organisations and individual Employers in England.

www.skillsforcare.org.uk Telephone: 0113 241 1275 Email: information.team@skillsforcare.org.uk

Stop Hate UK

UK's leading organisation working to challenge all forms of Hate Crime and discrimination.

www.stophateuk.org Telephone: 0800 138 1625

Holiday entitlement calculator

<https://www.gov.uk/holiday-entitlement-rights>

DBS

<https://www.gov.uk/dbs-check-applicant-criminal-record>

PPE Hub

<https://www.gov.uk/government/collections/coronavirus-covid-19-personal-protective-equipment-ppe>

HMRC

<https://www.gov.uk/government/organisations/hm-revenue-customs>

National Career Service

<https://nationalcareers.service.gov.uk/careers-advice/interview-advice>

Skills for Care – Working as a PA

<https://www.skillsforcare.org.uk/Employing-your-own-care-and-support/Resources/Working-as-a-PA/1.-What-is-a-PA/Being-a-personal-assistant/Being-a-personal-assistant.pdf>

The Care Certificate

<https://www.skillsforcare.org.uk/Learning-development/inducting-staff/care-certificate/Care-Certificate.aspx>