



## **Recruiting Personal Assistants, guidance and responsibilities**

### ***Service Agreement with Phoenix (SW) Ltd***

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Since 2009, Phoenix has been supporting older and disabled people to establish and manage their own support arrangements so that they can make the most of living independently in their own homes.

Most often, we do this by supporting people with the recruitment and employment of their own Personal Assistants (PAs) or carers. We provide support in the following ways:

- We can help you find and engage the right staff and make sure that they are properly checked and have the right experience
- On your behalf we can manage everything relating to your duties as an employer such as:
  - Payments and Invoice Settlement
  - Payroll & Tax
  - Auto-enrolment Pensions
  - Employer's Liability Insurance
  - Staff Contracts
- We can make sure your staff have the right training and equipment to be able to do their job properly
- We can support you to effectively manage your staff, maintain a stable and well functioning team with good communication with family and professionals
- We will help you to ensure that cover is found for any absences from your team that result from sickness or holiday
- We can help you ensure that all payments are made, accurately and on time, to staff and HMRC
- We can liaise with the Local Authority and the Social Work Department, providing them with all the information they require about how your support arrangements are going.

Funding for this support can be agreed by Bath & NE Somerset Council, or if you are funding this support yourself, then you can make arrangements with Phoenix directly.

Or costs are illustrated on the next page. You can choose to either purchase a bundle of services which we call Support Refresh, or you can choose to selectively purchase whichever service you require from a menu of options.

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	<b>Selective Purchase</b> No service bundling	<b>Support Refresh</b> Services bundled for a weekly fee*
<b>Payroll</b>	£25/Month	Included
Receipt checking and digital storage of timesheets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monthly processing of payroll	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Issuing payslips to all staff	£5/payslip	£4/payslip
Monthly returns to HMRC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Statutory payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Annual returns to HMRC and staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pension management with NEST	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Assistance	Not Available	<input checked="" type="checkbox"/>
BANES Audit Support	Not Available	<input checked="" type="checkbox"/>
<b>Staffing and Recruitment</b>		
Additional permanent Recruitment	£200	<input checked="" type="checkbox"/>
Short term cover recruitment	£100	<input checked="" type="checkbox"/>
Support managing staff	£25/hr	<input checked="" type="checkbox"/>
Help with rostering	£25/hr	<input checked="" type="checkbox"/>
Moderate online staff group	Not Available	<input checked="" type="checkbox"/>
Attendance at meetings	Not Available	<input checked="" type="checkbox"/>
Home visits as required	£25/hr	<input checked="" type="checkbox"/>
3 <sup>rd</sup> Party purchasing (PPE, Training, DBS)	20% plus cost	at cost
Out of hours helpline	Not Available	<input checked="" type="checkbox"/>
Careline contact	Not Available	<input checked="" type="checkbox"/>
Compliance tracking and reminders	£100/year	<input checked="" type="checkbox"/>
Care Certificate (Online)	£50	£20
Additional Training (Online)	50/module	20/module
Additional DBS Checks	20% plus cost	at cost
<b>Initial Set Up Costs</b>	<b><i>For additional work required to recruit and settle in a new team</i></b>	
Initial DBS Checks	£65/check	£59.60/check
Initial Advertising and Recruitment	£200	£50-£150
Establishing PAYE Scheme	£60	£50
Establishing PENSION (NEST)	£60	£50
Employers Liability Insurance	£114	£95
<i>Pricing of Support Refresh**</i>	<i>Dependent upon Package Size: £0-£199=£7.5/wk £200-£399=£12.5/wk £400+£17.5/wk</i>	
VAT	<i>All prices quoted exclude VAT</i>	

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### ***Additional Recruitment and Equipment***

Support from Phoenix will often include an initial cost covering start-up expenditure which includes advertising, recruitment, setting up a payroll and first year of employer's liability insurance. Subsequent costs, such as payments to PAs, annual insurance renewal and disposables (e.g. gloves/aprons/hand sanitiser) will be charged to your account.

Once a care arrangement has been set up, it is expected to be Self-Managing and not requiring the active involvement of Phoenix on a day to day basis. However Phoenix is available weekdays plus an out of hours service to respond to any queries or problems.

It is useful to contrast a self managed care arrangement to Care Agency delivered support . Care agencies employ their own staff who they send out to see their clients. Staff are employees of the agency and guided by their policies and rules. This means that the care agency takes much of the responsibility for managing the care delivery arrangements out of the hands of the clients and those who care for them.

### **What does this mean for you as someone engaging the services of a Personal Assistant (PA)**

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A personal assistant is engaged directly by the person they are supporting (or the family member or friend who is supporting them). The reason people choose this arrangement is because they often find it more satisfying for both PAs and for the person being supported. The reasons for this are:

- The person receiving support has more control over how they receive and arrange their support.
- The person receiving support can make decisions about what they would like their PA to do on a day to day basis without having to go through an Agency
- The person receiving support gets to see the same PA regularly, rather than having many different people providing support.
- The Personal Assistant (PA) benefits because shifts are often longer (never less than one hour) meaning that they can provide more holistic support rather than being overly task oriented.
- The PA will find that pay tends to be higher, because there is no agency taking a proportion of the money.
- The PA finds that they can choose to work with far fewer clients than is often the case with agencies, and consequently they can really get to know the person that they are working for and establish a really positive relationship.

### **Additional Responsibilities for Personal Assistants**

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Because PAs are not working for an Agency, but working directly for the person they are supporting, there are some important extra responsibilities for both the PA and for the employer.

For the PA, extra responsibilities are as follows:

- PAs must communicate effectively with everyone on their team. We strongly recommend that you ask Phoenix to set up a 'what's app' messaging group for you and

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your PAs, encourage them to share mobile phone numbers and to set up a communication book that all PAs can write in.

- Your PAs will see a lot of you and they are instructed that if they become aware of any worries or concerns about you or any of their team members, then they must take action. They will notify you and Social Services on 01225 396000 about any issues. This is called Safeguarding and is a process to make sure that you are kept safe.
- PAs are much more reliant on the other people in their team. If they need cover, the other people on the team may be able to cover for them so it is vital that they take the initiative to contact them first. They should also discuss their absence with you and give you as much notice as possible. If it still looks like you are going to be left without cover, you or your PAs should talk to Phoenix.

### **Additional Responsibilities for Person Engaging PAs**

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For the person employing their own PAs, there are also some extra responsibilities which Phoenix will guide and assist you in meeting.

- You must ensure that you have arrangements in place to meet your responsibilities regarding tax, insurance and pensions.
- You should ensure that your employees with a safe and secure environment within which they can effectively support you
- You need to ensure that you treat your staff respectfully and fairly. If you are not happy with your PA it is within your rights to address these issue, but you should do it in the proper fashion.
- You should be aware of your PAs training and support needs.
- You should agree a contract engaging your PA within the first three months of their employment
- PAs should be provided with at least two week's notice if their services are no longer to be required

For the vast majority of people who choose to employ their own personal assistant, the benefits of this personal and flexible approach to care vastly outweigh the additional responsibilities. However each person needs to carefully consider their own circumstances before making this decision.

You'll find more useful information about having your own Personal Assistants in the ***Employment Handbook*** which you may already have been sent or which is available on our Website in the downloads section, here: [www.phoenixsw.co.uk/downloads](http://www.phoenixsw.co.uk/downloads).

As a person engaging Personal Assistants, you are free to agree whatever arrangement you wish with your PAs. However our experience suggests that agreeing the following standard terms with your PAs help things run smoothly and safely

#### ***Cancelled Shifts***

It is understood that shifts may be unavoidably cancelled from time to time by the client. In order that cancellations do not create unsustainable income fluctuations for the Personal Assistant, the following applies:

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- If the shift is cancelled with less than 24 hours notice, or ended prematurely by the client, the shift will be paid in full as a cancellation payment.
- If the shift is cancelled with more than 24 hours notice, a retainer rate of half what would be expected will be paid.

### ***First Aid***

We encourage all clients to ensure that their PAs have up-to-date first aid training, and that there is a first aid box in the home. If training is required or you do not have a first aid box, please tell Phoenix and we will arrange for this to be provided

### ***Training***

Phoenix can arrange for your PAs, whether that be first aid, moving & handling or something more specific to your needs. We endeavour to find the best value provider, and the cost of the training will be charged to your account.

### ***Holidays***

All employed staff are entitled to 5.6 weeks holiday per year. However many staff choose to be paid out for their holiday, rather than take it as leave. Bank holidays are included in annual leave everyone but as they are often days that are difficult to cover (like Christmas Day & New Years Day) we do suggest they are paid out at double time.

## This agreement

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Once you have read this information sheet and feel confident that you understand it, we would be grateful if you could sign it and return a copy to Phoenix. This will constitute your agreement to receive support from Phoenix to assist you with the management of your support arrangements.

The support you will receive from Phoenix is as follows:

Payroll only	£25/month	
Support Refresh (inc Payroll)		
Level 1 (£0-£199/wk)	£7.5/week	
Level 2 (£200-£399/wk)	£12.5/week	
Level 3 (£400+/wk)	£17.5/week	

*Signed (Client):*

*Signed (Phoenix):*

*Print Name:*

*Print Name:*

*Date:*

*Date:*

*Please note: This agreement can be amended or cancelled with the provision of one month's notice.*

**Phoenix (SW) Ltd**

Registered address

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Bath BA1 7AL

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