

Guide to Employing Your Own Personal Assistant (PA)

Hiring a Personal Assistant (PA) can be a highly rewarding step in managing your personal or professional life more efficiently. This guide will take you through each stage of the process, from deciding who you need to ensuring you fulfil all your responsibilities as an employer.

Deciding Who You Need

The first step in employing a Personal Assistant is identifying your needs. Consider the following:

Type of assistance: Will your Personal Assistant assist with personal care, administrative tasks, household duties or a bit of everything?

Skill set: Do you require a Personal Assistant with specific skills such as first aid, or care certifications?

Hours and availability: Will your Personal Assistant need to work full-time, part-time, or on a flexible schedule?

Personal qualities: You may wish to consider the type of person you would feel comfortable with—trustworthiness, discretion, communication skills, and adaptability are common traits to look for.

Writing a Job Description

A well-written job description is essential for attracting the right candidates. You may wish to consider including:

Title and role summary: Start with a clear job title and a brief summary of the position.

Responsibilities: List the specific tasks your Personal Assistant will handle. Be as detailed as possible to give candidates a clear understanding of the role.

Required qualifications and skills: Include necessary experience, certifications (e.g., first aid), and personal attributes you expect (e.g., organised, punctual).

Hours and location: Specify whether the role is full-time, part-time, or flexible, and where the Personal Assistant will be based primarily.

Pay and benefits: Indicate the hourly or annual salary and any additional benefits, such as paid holidays and / or incentive schemes.

For detailed information on potential incentive and reward schemes for your Personal Assistant, please refer to the 'Incentives for Personal Assistants' information sheet.

Your insurance provider's legal helpline may offer a job description template and, depending on the provider, may assist you in completing it. For more detailed information on the available insurance providers, please refer to the Insurance information sheet.

Finding a Personal Assistant

I Want to Employ Somebody I Know

Advantages: Employing someone you know can offer trust and familiarity. However, clear professional boundaries should be maintained.

Challenges: Careful consideration is needed around how personal relationships might affect the working dynamic. Ensure the individual you know is fully capable of handling the tasks at hand and that the job description matches their skill set.

Advertising – Writing Job Advertisements

Where to advertise: Please consider using Hampshire County Council's PA finder ([Home Page | Hampshire \(hampshirepafinder.org.uk\)](http://Home Page | Hampshire (hampshirepafinder.org.uk))) which acts as a job board, provides additional information and is free of charge. You may wish to consider social media platforms (e.g. Facebook, Next Door) and universities or newsagents to advertise the role. There might be a charge on some of these alternatives.

Writing a job advertisement: Keep the job advertisement clear and concise. Include all the key elements from the job description, such as qualifications, tasks, location, and pay. Make sure the job advertisement reflects the role accurately this will mean you will attract the right candidates.

The Direct Payment Support Service has some job advertisement templates available, please contact us if you'd like these to be made available to you. Our email address is dpsupportservice@hants.gov.uk and our telephone number is 0370 779 1300.

How to Shortlist

Review applications: Compare each applicant's qualifications and experience against your job description.

Look for key indicators: Pay attention to cover letters, CVs, and any relevant experience. Please consider the quality of references and past employment history.

Narrowing down: Identify applicants who meet most of your criteria and aim to interview the top contenders.

The Direct Payment Support Service has some reference request templates available, these templates vary depending on if the applicant will be working with an adult or a child. Please refer to the reference request information sheet.

Making the Job Offer

Offer letter: Once you have selected your ideal candidate, issue a formal job offer. The offer should include details such as the start date, pay, hours, and job responsibilities.

Trial period: Include a clause about the trial period (e.g., 3 months) to assess whether the candidate is the right fit.

Your insurance provider's legal helpline may offer a job offer template and, depending on the provider, may assist you in completing it. For more detailed information on the available insurance providers, please refer to the Insurance information sheet.

Using A Personal Assistant Who is Self-Employed

Contracting a self-employed Personal Assistant: If your Personal Assistant is self-employed, they will need to handle their own taxes and insurance. Ensure they provide documentation proving their self-employed status.

Insurance: Make sure the self-employed Personal Assistant has the necessary liability insurance, as they will not be covered by your employer's insurance.

Being a Good Employer

Employment Paperwork – Inducting Your New Member of Staff

Contract of employment: Issue a formal contract outlining job responsibilities, working hours, pay, and conditions of employment. You are required to provide a contract of employment only to individuals you hire as employees. If your Personal Assistant is self-employed, a contract of employment is not necessary.

Your insurance provider's legal helpline offer a contract of employment template and, depending on the provider, may assist you in completing it. For more detailed information on the available insurance providers, please refer to the Insurance information sheet.

Induction: Familiarise your Personal Assistant with their duties and any specific needs or preferences you may have. Provide essential documents like health and safety policies.

Trial Period

Purpose: A trial period allows both you and the PA to evaluate the working relationship.

Evaluation: At the end of the trial period, assess performance and decide whether to make the position permanent or address any areas of improvement.

Pension Information

Automatic enrolment: If your Personal Assistant works for you regularly and earns above a certain threshold (£520 per month), you are legally required to enrol them in a pension scheme. Your payroll provider will complete auto enrolment and will advise the amount to pay your pension provider via the Virtual Wallet, who will make any payments on your behalf.

Compliance: Your chosen payroll provider will ensure you comply with pension auto-enrolment regulations, please consult with your payroll provider if necessary.

For more detailed information on the available payroll providers, please refer to the Payroll Providers information sheet.

Equality – Avoiding Discrimination

Fair treatment: Please ensure that your recruitment process is non-discriminatory. Avoid any biases based on age, gender, race, disability, or other protected characteristics.

Legal compliance: Familiarise yourself with laws related to equal employment opportunities and ensure your employment practices meet these standards.

Training

Ongoing training: Provide any necessary training your Personal Assistant may need to perform their duties effectively, such as first aid or specific care skills.

Some insurance providers provide free e learning within their policies, please enquire about e learning training with your insurance provider.

You may also wish to review the Skills For Care website,

<https://www.skillsforcare.org.uk/Home.aspx>

Compliance training: Ensure your PA is aware of health and safety regulations, data protection, and any other legal requirements.

Working Hours and Paid Holiday

Legal entitlement: If you employ a Personal Assistant, it is your responsibility to ensure your Personal Assistant receives their legal entitlement to paid holidays, typically 5.6 weeks per year for full-time employees.

The legal helpline of your insurance provider can ensure and / or your payroll provider can support with the workings

Working hours: Clearly outline expectations for working hours, and make sure they are fair and compliant with employment law.

Please contact the legal helpline of your insurance provider, if you require clarification and / or support around the working hours of your Personal Assistant.

How to Construct a Rota

Clear scheduling: Construct a rota that clearly outlines shift patterns, working hours, and if you choose the expected responsibilities of a particular shift.

Flexibility: Ensure the rota meets both your needs and those of your Personal Assistant, and allow for adjustments when needed.

National Minimum Wage

Compliance: Ensure your Personal Assistant is paid at least the National Minimum Wage, which varies based on age and employment status.

Updates: Regularly check for updates to minimum wage laws to ensure compliance. Please review (<https://www.gov.uk/national-minimum-wage-rates>) for the latest legislation and / or contact your payroll provider.

How Do I Get the Most from My Personal Assistant?

Open communication: Foster an environment where your PA feels comfortable communicating with you about their role.

Feedback: Provide regular feedback and support to help your PA grow in their role. Encourage initiative and reward good performance.

What to Do If Things Are Not Working Out

Addressing issues: If your Personal Assistant is not meeting expectations, address the issue directly. Provide constructive feedback and the opportunity for improvement.

Legal advice: If the situation does not improve, please discuss the situation with the legal helpline from follow proper procedures to terminate the contract, ensuring legal and ethical guidelines are followed.

Staying Safe

Background Checks (Including the Right to Work in the UK)

Legal right to work: Ensure your Personal Assistant has the legal right to work in your country. This may require checking passports or work visas. The legal helpline our insurance provider

Criminal background checks: For some roles, particularly those involving vulnerable individuals, a Disclosure and Barring Service (DBS) check may be required.

Health and Safety

Workplace safety: Ensure your home or workplace is compliant with health and safety regulations. This includes providing appropriate training for manual handling or other tasks that carry a risk.

Data Privacy Notice

Data protection: Provide your Personal Assistant with a data privacy notice outlining how personal information will be handled and stored in compliance with GDPR or other applicable laws.

References

Previous employment: Always request and check references to verify your PA's employment history and suitability for the role.

When is a DBS Check Required?

Vulnerable individuals: A DBS check is required if your PA will be working with children, elderly people, or others considered vulnerable.

Where to Interview a Personal Assistant?

Neutral setting: Choose a professional, neutral location such as a café, co-working space, or a room in your home or office for interviews.

Privacy: Ensure the interview setting allows for confidentiality and a professional conversation.

Backup Plans

Contingency: Have a plan in place for times when your PA is sick or unavailable. This could include hiring temporary cover or making alternative arrangements.

Document Checks

What Documents You Need to See

Proof of identity: Passport or birth certificate.

Right to work: Work visas or residency permits if applicable.

Qualifications: Relevant certificates or diplomas.

DBS check: If required for the role.

References: From previous employers or personal contacts.

Insurance

Ensure you have the appropriate insurance in place, such as employer's liability insurance, to protect both you and your PA in case of accidents or other issues. Refer to an insurance advice sheet for specific coverage requirements.

The Direct Payment Support Service hope you have found this information sheet useful.

The Direct Payment Support Service is available Monday to Friday from 9am until 5pm using the telephone number and email address below and on the first page of the information sheet. Any emails that are received will receive a reply within three working days.

The Direct Payment Support Service contact details: -

Tel: 0370 779 1300

Email: dpsupportservice@hants.gov.uk

The Direct Payment Support Service has further information sheets on various topics, including:

- Introduction to Direct Payments
- Information on Advocacy
- Acting as an Authorised / Nominated person
- Introduction to PPL Virtual Wallet
- Information on Insurance providers
- Information on Payroll providers
- Introduction to employing a Personal Assistant
- Guide to employing your own Personal Assistant
 - Including interview question templates and job advertisement templates
- Ending a Direct Payment