

***ALTERNATIVE COMPETENCY  
DEMONSTRATION  
FOR THE  
PERSONAL CARE AIDE***

**NEW YORK STATE DEPARTMENT OF HEALTH  
Division of Home and Community Based Services  
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## INTRODUCTION

The Alternative Competency Demonstration (ACD) has been designed to standardize the process used throughout New York State to exempt qualified individuals from required basic training for the Personal Care Aide. This assessment process will assure that all those who have completed a Department approved Personal Care Aide basic training course utilizing the Home Care Curriculum (HCC) and Department of Health (DOH) approved textbooks; and those who have completed the ACD meet the same criteria. **This ACD is available for use only by agencies with Department-approved Personal Care Aide Training Programs.**

Candidates who fail to successfully complete the ACD must successfully complete a Department-approved Personal Care Aide basic training course (which must cover the Home Care Curriculum (HCC) (April 2006, January 2007)) prior to placement on a Personal Care Services case. Candidates successfully completing the ACD will be considered to have met the Department's basic training course standards for a Personal Care Aide. Successful candidates will be exempt from further training for this level of work unless the agency with whom they applied has content or modules in its training program beyond that required by the Department. In such instances the provider agency will be responsible for developing an assessment tool or providing training for that content. The provider agency remains responsible for providing the aide with orientation to the agency and to the job prior to case assignment.

This document contains confidential material. Personal Care Aide Training Program staff are advised to maintain strict control over all copies of this document and to restrict access to this document to only those individuals who are administering the exam.

## QUALIFICATIONS OF CANDIDATES

In addition to the minimum qualifications for personal care aides as specified in 18 NYCRR 505.14 (d), individuals who are assessed with the ACD must also have related experience or training.

Minimum Standards:

### Related Experience

Related experience is defined as experience in an institutional or home setting which involves the performance of hands-on skills included in the required basic training program. Experience obtained through employment as a nurse's aide in a nursing home or hospital or as a home health aide is acceptable. Non-paid experience obtained through care of an elderly relative or child in the home is also acceptable.

Qualifying experience should, at a minimum, be of three months duration and have been obtained within three years preceding competency testing.

### Related Training

Related training is defined as training received through other kinds of formal training programs involving instruction in hands-on skills included in the required basic training program. Students who are enrolled in a registered professional nurse or licensed practical nurse program and have had direct patient care experience may be tested.

## DOCUMENTING THE CANDIDATE'S QUALIFYING TRAINING OR EXPERIENCE

The employing agency is responsible for obtaining documentation to support related experience or training prior to an individual's participation in competency testing. If documentation cannot be obtained, the individual must successfully complete a basic training program approved by the NYS Department of Health.

Related experience or training must be documented in each individual's personnel record. Related experience may be documented by written references or letters from a former or current employer or from a person, such as a physician, who can reasonably evaluate the individual's performance. Character references only, are unacceptable. Telephone references may be obtained by the employing agency but must be documented in writing by the agency and include an evaluation of the individual's performance from the person or persons contacted. Documentation of related training may be a certificate, a letter notifying the individual of successful completion of the training, a license, or an outline of the training program attended with written reference from the instructor.

## THE ALTERNATIVE COMPETENCY DEMONSTRATION PROCESS

### Overview

The Alternative Competency Demonstration (ACD) encompasses the evaluation of the candidate's attitudes, knowledge base and specific skills performance. Each of these three areas is assessed by a different set of criteria and standards which are briefly described below. Each evaluation component is weighted equally and all three areas must be successfully completed by the candidate in accordance with the established pass/fail standard.

It is suggested that one person conduct all three parts of the ACD. In this way the test administrator can observe the candidate under different situations and will be able to comment on the candidate under a variety of conditions. In some instances it may not be practical to have one person conduct all three parts of the assessment. When this is the case, it is recommended that the individuals conducting the three ACD components meet to mutually complete the summary form.

Because attitude affects all areas of an aide's job, and because it may be very difficult to make up deficits in this area through training, it is recommended that the interview attitude evaluation be given first. If the candidate does not successfully pass the interview component, he or she may **not** be permitted to take any other part of the ACD.

It is recommended that the written exam be given next, to be followed by the performance demonstrations. This seems the best utilization of the test administrator's time since the candidate will have had to successfully complete the attitudinal and knowledge evaluations before attempting the most time consuming portion of the evaluation process, the Performance Demonstrations.

The competency testing instruments may be translated into languages other than English or may be administered by an interpreter. This option may be appropriate when individuals have limited reading, writing and oral communication skills in English. Translation of testing instruments or use of interpreters should be determined by the contractual agreements between the testing agency, provider agency and/or local social services district.

#### I. Attitude Evaluation: The Interview

The attitude of the candidate toward his or her work, toward the clients with whom he or she will be working and personal qualities will be evaluated through an interview utilizing case vignettes as the testing materials. Additional observations of the candidate's attitudes may also be noted during the written test and during the demonstration of the skills related to personal care and body mechanics.

## II. Knowledge Evaluation: The Written Exam

Knowledge of home care tasks and responsibilities will be evaluated through a written test which will cover theory and its application to all areas required in a Personal Care Aide basic training course, as contained in the Home Care Curriculum. The candidates will be demonstrating not only knowledge of personal care service concepts but also the ability to apply that knowledge to typical situations in which they may work.

## III. Skills Evaluation: The Performance Demonstrations

The skills related to hands-on personal care tasks, such as application of proper body mechanics when transferring a client or assisting a client with bathing will be assessed through demonstrations performed by the assessment candidate.

## THE INTERVIEW

### Introduction

The interview, which evaluates the attitude and personal qualities of the candidate, is a very important part of the Alternative Competency Demonstration (ACD). Candidates who do not pass the interview component of the assessment process are not to proceed on to the skills and knowledge components.

The interviewer first questions the candidate regarding prior training or related work experiences. Example questions are included in Appendix A, page 15. These questions should draw from the candidate's attitude about work itself, about working with people and especially attitudes about working with the elderly and handicapped.

The interviewer is to use a series of vignettes as discussion starters to bring out the candidates' attitudes and reactions to specific problem areas and situations which they might encounter. The vignettes which are located in Appendix A on pages 19-27 depict the type of situations Personal Care Aides may find when they are on the job. The resulting focused discussion gives the interviewer an opportunity to observe the attitudes and emotional maturity of the candidate.

Additional opportunities for observation of the candidate's attitude and maturity will occur during administration of the written test and the skills demonstrations. The test administrators are urged to add their observations to the Interview Assessment Form (pages 16 and 17) in order to get a more accurate profile of the candidate.

### Interview Environment

The interview should be conducted by a professional with experience in home care. It should be done individually, one candidate at a time, in an office or other quiet place which provides privacy.

### Time Allotment

Approximately 30 minutes

### Scoring

The interview is scored on the Interview Assessment Form (Appendix A, pages 16 and 17). This form consists of eleven observations which are scored pass/fail. If the candidate fails any of the observations, comments must be made on the Assessment Form to support the observation. If the candidate receives more than two to three fails, the interviewer should assess whether the comments justify failing the candidate over-all. Four checks in the fail column automatically mean an overall fail. Since this form is kept as a permanent record for each candidate who passes the interview, a general overall observation must be made on the Interview Assessment Form (page 17, Section C) to support the decision that the candidate has good potential as an aide.

## Procedure

1. Refer to Appendix A, pages 16 and 17 for a copy of the Interview Assessment Form, case vignettes, and answer keys. Complete the top section of the Interview Assessment Form.
2. Set form aside and complete after the interview is over.
3. Begin the interview by discussing applicant's prior work experiences, either paid or volunteer. See Appendix A, page 18 for suggested questions.
4. Pick at least 3 appropriate vignettes from the 9 provided (Appendix A, pages 19–27). Read them aloud one at a time or ask the candidate to read them silently. Ask the candidate to discuss each vignette and give the best answer or an original one if he or she prefers. Encourage open discussion and possible solutions not mentioned in the vignettes. Answer keys, which identify unacceptable choices to the responses listed, follow each vignette.
5. Remind the candidate that there is no one correct response though some are better than others. The ones provided in the vignettes are meant as a starting point for discussion only.
6. When the candidate is finished with the vignettes, end the interview and complete the Interview Assessment Form. Space is provided in Section C, page 17 of the Interview Assessment Form for the interviewer to note comments in support of a pass/fail grade.
7. If the candidate has successfully passed the interview component, he/she may proceed to the written exam. If the interviewer feels that the candidate has potential but should be observed in additional settings, the candidate can also continue on to the written test. If the candidate failed the interview component, complete the Interview Assessment Form and the Summary Evaluation Form (Appendix D, page 79) and notify the candidate.

## THE WRITTEN EXAM

### Introduction

This component of the ACD includes a written exam consisting of 199 questions. The questions evaluate the content included in the Home Care Curriculum (HCC). The exam questions should be obtained from the bank of test questions provided by the publisher of DOH approved textbooks. The number of questions based on each HCC module should be consistent with the evaluations given in the Basic Training course.

If possible, the test administrator should go over any missed questions on the assessment candidate's scored test so that the test can be used as a learning experience.

### Testing Environment

The test should be given in a quiet room with adequate space and light and it should be administered by a professional. The test administrator may clarify questions for the candidate but may not interpret them or give leading information.

### Time Allotment

Approximately one and a half to two hours.

### Scoring

The pass/fail standard each Home Care Curriculum Module is 80%. The test should be scored prior to the administration of the performance demonstrations and following the interview.

### Procedure

1. The test directions are located in Appendix B.
2. Provide the candidate with a suitable pen or pencil.
3. Instruct the candidate by reading aloud the test directions. The applicant may read the same directions silently. The test administrator should ascertain that every candidate understands how to answer the questions before beginning the test. A follow-up check should be made during the testing period to make sure that the directions are being followed and candidates should be encouraged to ask the test administrator for help if they don't understand the procedure.

4. Inform the candidate that this test is not timed but that it usually takes about one and a half to two hours to complete. If a candidate requests additional time it should be granted. Candidates should finish the test, regardless of the amount of time it takes.
5. Collect the completed test(s) and score immediately.
6. If the candidate has successfully completed the knowledge test component, he/she may proceed to the skills performance demonstration. If the candidate failed the knowledge test, complete the Summary Evaluation Form (Appendix D, pg. 119), and inform the candidate of his/her scores.
7. If the candidate passed, review the questions missed, identify the correct answer and explain why that answer is correct.\*

\*optional

## THE PERFORMANCE DEMONSTRATIONS

### Introduction

The successful performance of the skills related to personal care and body mechanics are an important part of the knowledge of the Personal Care Aide. While these skills are not used with every client, the worker must be able to perform them safely when required. The personal care skills must be demonstrated on another person, rather than on a manikin and should be completed in their entirety, not merely described.

Dialogue carried out between the candidate and the test administrator during the demonstration is encouraged to put the candidate at ease. However, it should not distract the candidate or be used to prompt the candidate in the performance of the skill.

### Testing Environment

The demonstration of the personal care and body mechanics skills must be done in a laboratory setting which includes the following equipment: a hospital bed, a wheelchair, bed linens, a bed pan, towels, wash cloths, basin, toothbrush, tooth paste, rinse cup, soap, paper towels, large and small pillows and blankets. Review each procedure to determine the complete list of equipment needed to demonstrate that skill. The supervision and scoring should be done by a registered nurse with experience in home care.

### Time Allotment

Approximately one hour.

### Scoring

It is recommended that the trainee pass the twelve required procedures plus at least two other optional procedures of the trainer's choosing, listed in Appendix C, page 30. The optional procedures should be related to the typical caseload or other needs of the agency.

### Procedure

1. Explain to the candidate the twelve skills they must demonstrate and the two other skills selected by the test administrator.
2. Explain to the candidate that any questions about the demonstration must be asked before beginning the procedure and the candidates should not ask any questions related to the procedure once the demonstration has begun.
3. Each candidate will work with a partner (preferably another candidate) who will act as a "client" or "patient." Each candidate will take turns performing the demonstrations while the test administrator observes.

4. In addition to observing the performance of the skills, the test administrator should observe the interaction between the candidate and the “client” or “patient.” Any attitudinal clues thus observed should be recorded. For example, does the candidate explain to the “client” what is being done while each procedure is demonstrated?
5. Each of the procedures in Module XII has a checklist for evaluation purposes.

## SUMMARIZING AND DOCUMENTING THE EVALUATION RESULTS

Each of the three sections of ACD, (the interview, the written exam, and the performance demonstrations) is weighted equally. The first step of the ACD process is to administer the interview component. If during the interview process an applicant fails to demonstrate qualities needed to relate to the sick and the elderly, and the maturity to carry out the responsibilities that are part of the job of a Personal Care Aide, the candidate is not eligible to proceed with the two remaining ACD components and a “Fail” score should be indicated. Demonstration of appropriate qualities and attitudes needed in working with the sick and elderly should be indicated by a “Pass” score.

The pass/fail standard each Home Care Curriculum Module is 80%.

The candidate must pass the twelve required procedures plus at least two other optional procedures of the trainer’s choosing, listed in Appendix C. page 30. Asterisks on the summary chart on page 31 and on the individual procedures that follow indicate the twelve required procedures.

When the assessment process is complete, fill in the Summary Evaluation Form found in Appendix D, page 79, and place it in the individual’s permanent personnel file.

APPENDIX A  
THE INTERVIEW

INTERVIEW ASSESSMENT FORM

Name of Candidate: \_\_\_\_\_

Employing Agency Name: \_\_\_\_\_

Interviewer's Name and Title: \_\_\_\_\_

Date: \_\_\_\_\_

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I. INTERVIEW

A. Prior Training and Work Experience: (paid/unpaid and/or related training in the home health care field or related fields).

Does applicant appear to be:	pass	fail
1. mature in judgment	_____	_____
2. interested in the elderly	_____	_____
3. accepting of the disabled	_____	_____
4. patient and supportive with others	_____	_____

B. General Attitudes: (after discussing at least 3 of the vignettes with the assessment candidate, complete the following checklist).

Does applicant appear to:		
1. be able to show empathy to others	_____	_____
2. show consideration for others in unpleasant situations	_____	_____
3. verbalize supportive responses	_____	_____
4. avoid derogatory or negative responses	_____	_____
5. show respect for others' cultural biases	_____	_____
6. show understanding of and patience with other family member's problems	_____	_____
7. be able to deal with anger constructively	_____	_____

C. Comments: (supporting your assessment of the personal qualifications of the candidate).

- Comments about previous work:

- Comments on general attitude:

II. WRITTEN TEST (To be completed following administration of written tests to support final pass/fail grade).

- Observations made during written test which provide additional insight related to personal attitudes or qualifications.

III. DEMONSTRATIONS (To be completed following performance demonstrations to support final pass/fail grade.)

- Observations made during demonstrations which support previous observations or provide additional insight into the personal qualifications of candidate.

Candidates Attitudinal Evaluation (Pass/Fail) \_\_\_\_\_

## INTERVIEW

### Open-ended Questions – examples

1. What kind of work did you do in your last job?
2. What kind of training did you receive?
3. What did you like best about your previous job/training?
4. What did you like least about your previous job/training?
5. Did you have any hands-on experience with patients?
6. What kind of patients/clients did you work with in your previous place of employment?
7. How long did you work for “X” agency or for “X” person? Why did you leave?
8. What kind of contacts have you had with elderly and disabled adults and/or children?
9. Have you worked with the elderly? disabled? with children?
10. What kinds of tasks have you performed for patients? Clients?
11. What kind of patients/clients do you like working with the best?
12. Have you prepared meals for patients? clients? If so, tell what kinds of foods you prepared.

### **VIGNETTE #1**

Mrs. Brown is an elderly lady who has lived alone for many years. She has a small apartment that is now very cluttered with many things that she has collected. The apartment is also very dirty.

Mrs. Brown has many health problems. She has a heart condition, a bladder problem and cataracts. The bladder problem causes her to smell of urine all the time.

Mrs. Brown knows that her home is dirty and she is embarrassed about it. However, she does not realize that she has a bladder problem. Also, because of her poor eye sight, she does not know that she often wears soiled clothing.

#### **What should you do?**

1. Tell Mrs. Brown that her apartment is very messy and you are going to begin by throwing out all the old papers and magazines.
2. Tell her all the things you are assigned to do for her.
3. Sit down and get acquainted.
4. Ask her if she has any problems that you can help her with.

### **ANSWER KEY FOR VIGNETTE #1**

THE ONLY UNACCEPTABLE ANSWER IS #1.

The candidate's response should indicate:

1. Ability to show a positive desire to be a helper.
2. Ability to show acceptance and empathy.
3. Interest in developing a good relationship.

## **VIGNETTE #2**

Mr. Dumont is getting a Home Care Worker for his wife who is recovering from a stroke. For several weeks, he has taken care of his wife and their home alone; however, he is no longer able to do the work on his own.

On your first visit, Mr. Dumont greets you warmly and takes you to his wife's room to introduce you. Mrs. Dumont is very surprised to see you and is unhappy with your presence. She protests saying that they do not need any help.

### **What should you do?**

1. Call up the agency and tell them the problem.
2. Reassure Mr. Dumont secretly that you will work in other parts of the house so that Mrs. Dumont will not see you.
3. Explain to Mrs. Dumont that you are there to make things easier for both of them.
4. Leave, since it is obvious that Mrs. Dumont does not want you there.

## **ANSWER KEY FOR VIGNETTE #2**

THE ONLY UNACCEPTABLE ANSWERS ARE #2 AND #4.

The candidate's response should indicate:

1. Ability to manage a difficult situation tactfully.
2. Ability to use the agency as a resource.
3. Ability to make compromises in order to ease a situation.

### **VIGNETTE #3**

Mr. Thomas was 55 when he had a massive heart attack. He had to sell his business and he and his wife moved to an apartment. Soon the men he knew through his business stopped coming by to see him and he dropped out of all of the old activities.

Mr. Thomas' life now revolves around eating and sleeping and he worries about every ache and pain.

Recently, Mrs. Thomas had a stroke. She now worries that she can no longer take care of Mr. Thomas.

You have been assigned to take care of both of them. You find that Mr. Thomas is short of patience and gets angry often. One day as you are finishing lunch preparation, he loses his temper and yells at you because lunch is late.

What should you do?

1. Ignore him.
2. Tell Mr. Thomas "I don't have to take this. If you don't stop, I'll leave."
3. Accept the anger as a result of his problems and not take it personally.
4. Tell him you're doing the best you can.

### **ANSWER KEY FOR VIGNETTE #3**

THE ONLY UNACCEPTABLE ANSWERS ARE #1 & #2.

The candidate's response should indicate:

1. Ability to acknowledge anger and not take it personally.
2. Unwillingness to be condescending and negative.
3. Ability to keep cool in the face of someone else's anger.

#### **VIGNETTE #4**

You are assigned to work with Mrs. Baker who lives with her daughter. Her daughter works during the day and you take care of Mrs. Baker while she is gone.

Frequently relatives and the daughter's friends come in the evening after you have left. They eat the food you have purchased for Mrs. Baker, leave dirty dishes, and mess up the living room which is also used by Mrs. Baker.

You also find that the daughter puts her dirty laundry into the hamper with Mrs. Baker's laundry which you must wash.

#### **What should you do?**

1. Do the extra dishes and laundry whenever you have the time to do it.
2. Do the dishes, laundry and clean up the mess once, then ask the agency to explain to the daughter what your responsibilities are.
3. Ask the agency to tell Mrs. Baker's daughter what your responsibilities are.
4. Refuse to do anything but those jobs assigned to you and tell the daughter that she is not to eat food which is not hers-nor mess up the living area which belongs to Mrs. Baker.

#### **ANSWER KEY FOR VIGNETTE #4**

THE ONLY UNACCEPTABLE ANSWERS ARE #1 AND #4.

The candidate's response should indicate:

1. Ability to be assertive in an acceptable manner.
2. Ability to use the agency as a resource.
3. Ability to avoid taking such situations personally.

### **VIGNETTE #5**

Mr. Cohen suffers from high blood pressure. Recently, he lost his wife through a heart attack and he is depressed. He depended on Mrs. Cohen to take care of his needs. She cared for the house and prepared all the food. Because Mr. Cohen is Jewish and observes the Jewish dietary laws, his food preparation must be kosher. Mrs. Cohen always kept a kosher kitchen.

You are now responsible for shopping for and preparing Mr. Cohen's food. Although you have cared for people with high blood pressure before, you have not worked for a family that keeps a kosher kitchen.

It is a cold day and you warm the milk that Mr. Cohen drinks in the middle of the afternoon.

When Mr. Cohen realizes that you have used a pan that is for meat, not for dairy foods, he is furious with you because the pan will now have to be thrown out.

**What should you do?**

1. Apologize to him and explain that you have not worked in a kosher kitchen before.
2. Refuse to go back to the job since it is obvious that Mr. Cohen is going to be difficult to work with.
3. Ask the agency for information about cooking in a kosher kitchen.
4. Scrub the pan thoroughly and put it back into the cupboard since it is a good pan and should not be thrown away.

### **ANSWER KEY FOR VIGNETE #5**

THE ONLY UNACCEPTABLE ANSWERS ARE #2 AND #4.

The candidate's response should indicate:

1. Sensitivity to cultural and religious beliefs.
2. Ability to manage a difficult situation.
3. Ability to use the agency as a resource.

### **VIGNETTE #6**

The Jones family is made up of the mother and her four children ages 2, 4, 8 and 10. Mrs. Jones has been ill with complications following major surgery and is unable to care for the children and the house by herself. She is divorced and was working full-time when she first became ill.

Between the demands of her job, her children, her illness and her surgery, the house is a mess and she has become short tempered and irritable with her children.

By the end of the first two weeks, the house is clean and neat and the children are enjoying the attention you have given to them. However, Mrs. Jones is getting irritable because the children look to you for help rather than to her.

#### **What should you do?**

1. Tell Mrs. Jones that she shouldn't be upset because she needs to rest and recuperate.
2. Stop giving the children the attention you were giving.
3. Tell the children that they should go to their mother with their questions.
4. Gradually let the mother take more responsibility for the housekeeping and care of the children.

### **ANSWER KEY FOR VIGNETTE #6**

THE ONLY UNACCEPTABLE ANSWER IS #1.

The candidate's response should indicate:

1. Knowledge that the aide should not try to replace the role of the mother.
2. Attitude of tolerance toward housekeeping standards of others.
3. Ability to assist in teaching more constructive behavior such as how to organize work and how to handle children.

### VIGNETTE #7

Kim is a 10 year old child who is severely retarded. She is unable to do anything for herself including going to the bathroom. You must dress her, change her diapers, feed her and keep her company while her mother is at work.

Except for taking a nap in the afternoon, she is awake during the rest of the time you are there. One day she dirties her diaper half way through lunch. After you change her she wants to be held and play with instead of finishing lunch.

What should you do?

1. Scold Kim for messing in her pants.
2. Hold Kim and coax her to eat more of her lunch.
3. Tell Kim a story about a girl eating her lunch.
4. Hold Kim and play with her.

### ANSWER KEY TO VIGNETTE #7

THE ONLY UNACCEPTABLE ANSWER IS #1.

The candidate's responses should indicate:

1. Attitude of caring toward severely retarded children.
2. Ability to empathize with a retarded child.
3. Ability to see the child as a human being with feelings and the right to be treated as one.
4. Resourcefulness of candidate to find a suitable activity for the child, e.g., read simple stories, ask the agency what she could do, and ask the mother what works for her.

### **VIGNETTE #8**

Mrs. Smith is an elderly woman who became blind as a result of diabetes. Until she became blind she lived alone, took care of her apartment and did her own cooking. Now she must have help for it is very difficult for her to do everything by herself.

You are the first aide she has had. You have tried to be patient but she gets angry easily and has even thrown pillows from the sofa at you. After working with her for two weeks, you find it very difficult to put up with her crying and complaining.

What should you do?

1. Tell her “Please help me to help you. I want to help.”
2. Call the agency and ask to be replaced.
3. Call the agency and ask for help.
4. Yell back at her when she yells at you.

### **ANSWER KEY TO VIGNETTE #8**

THE ONLY UNACCEPTABLE ANSWERS ARE #2 AND #4.

The candidate’s responses should indicate:

1. Tolerance of a disabled person.
2. Ability to understand the anger of a client.
3. Ability to deal with the anger of a client.

### **VIGNETTE #9**

Mr. Martin is an 80 year old retired railroad worker. He is a bachelor and after he retired he became lonely. He began spending a lot of time in bars with the railroad men he knew. Eventually, because of the heavy drinking and lack of good nutrition, his blood circulation became poor, he contracted gangrene in one foot and had to have his foot amputated. He is now a bitter, angry man who resents needing help and not being able to spend his time in his favorite bars.

You have been assigned to assist Mr. Martin with meal preparation as well as other tasks. He refuses to eat the food you prepare, saying that it tastes like garbage. He prefers doughnuts and chocolate cake. He refuses to let you bathe him often enough or completely and he appears messy and smells dirty. He begins to drink heavily and asks you to sit and drink with him.

What should you do?

1. Give up trying to prepare nourishing meals and give him what he wants.
2. Tell him that if he takes a bath you will let him have one drink in the afternoon.
3. Call your supervisor and ask for help.
4. Encourage Mr. Martin to talk about his days as a railroad man.

### **ANSWER KEY TO VIGNETTE #9**

THE UNACCEPTABLE ANSWERS ARE #1 AND #2.

The candidate's response should indicate:

1. Ability to deal with a stubborn patient who will not follow the Care Plan.
2. Accepting attitude toward drinking by the client.
3. Ability to deal with an angry client.
4. Ability to deal with manipulative client.

APPENDIX B  
THE WRITTEN EXAM

## TEST DIRECTIONS

The test administrator will read the following directions aloud while the candidate follows.

### Instructions

This written test is made up of 199 questions. The test takes about one and a half to two hours to complete. While you may complete the test before the time is up, additional time is allowed if you have not finished by that time.

There is no penalty for guessing and you are encouraged to answer all questions even if you are not sure of the answer.

If you have any questions, please let the test administrator know and the test administrator can make sure you understand the instructions.

The term “Home Care Worker” is used throughout the test to describe the job you are being tested for.

Do you have any questions about what you are supposed to do?

If you have no (more) questions, you may begin.

APPENDIX C  
THE PERFORMANCE DEMONSTRATIONS

PROCEDURE CHECKLIST:	PAGES
* XII-1, Proper Handwashing	1
XII-2, Proper Body Mechanics	2
XII-3, Tub or Shower Bath	3
XII-4, Turning the Client in Bed	4
* XII-5, Bed Bath	5
XII-6, Shampoo in Bed	6
XII-7, Back Rub	7
XII-8, Nail Care	8
XII-9, Shaving the Client	9
* XII-10, Mouth Hygiene and Care	10
XII-11, Assisting with Eating	12
XII-12, Assisting With Dressing	13
XII-13, Assisting with the Use of Elastic Support Stockings	14
* XII-14, Helping the Client to Walk	15
XII-15, Making an Unoccupied Bed	16
* XII-16, Making an Occupied Bed	17
* XII-17, Use of a Bedpan	19
XII-18, Use of Urinal	20
XII-19, Assisting with the Use of the Condom Catheter	21
XII-20, Assisting with Cleaning the Skin and Catheter Tubing	22
XII-21, Assisting with the Emptying of the Urinary Drainage Bag	23
XII-22, Positioning the Client in Bed	24
XII-23, Transfer to the Sitting Position	26
XII-24, Helping the Client to Sit at the Side of the Bed	27
XII-25, Helping a Client to Stand	28
* XII-26, Transfer to Wheelchair, Chair or Commode	29
XII-27, Positioning Client in Chair or Wheelchair	30
XII-28, Transfer from Wheelchair to Toilet	31
XII-29, Transfer from Wheelchair to Shower and Assisting with Shower	32
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\* required procedures

## ***Required and Optional Procedures:***

Each of the procedures in Module XII has a checklist for evaluation purposes. As a practical matter it may not be possible to evaluate the trainee on every procedure. However, there are certain basic procedures the trainee should be required to demonstrate. It is recommended that the trainee pass twelve required procedures plus at least two other optional procedures of the trainer's choosing. These optional procedures should be related to the typical caseload or other needs of the agency. Asterisks on the summary chart on page 31 and on the individual procedures that follow indicate the twelve required procedures.

### **Checklist for Procedure XII -1**

#### **\*PROPER HANDWASHING**

1. Gathers equipment: soap, paper towels.
2. Gathers towel if no paper towels are available.
3. Rolls up sleeves and removes watch and jewelry.
4. Wets hands under warm, running water.
5. Applies a generous amount of soap and lathers hands well.
6. Washes entire surface of hands, between the fingers, around and under the fingernails, up to above the wrist, according to current CDC guidelines.
7. Rinses hands thoroughly under warm, running water with hands lower than wrist.
8. Dries hands using a clean cloth or paper towel.
9. Turns off the tap with paper towel.

Using Alcohol-based hand cleaners in situations where there is no running water or hands are not visibly soiled.

1. Applies product to one hand (amount determined by product instructions).
2. Rubs hands together, covering all surfaces of hands and fingers until hands are dry.

**Checklist for Procedure XII-2**  
**PROPER BODY MECHANICS**

1. Uses firm base of support.
2. Keeps back straight.
3. Faces in direction of movement.
4. Places one foot ahead of the other.
5. Keeps objects being lifted close to body.
6. Uses weight of his/her body when pushing or pulling.
7. Bends at knees and hips.
8. Turns with feet, does not twist at waist.

**Checklist for Procedure XII-3  
TUB OR SHOWER BATH**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment
4. Ensures warmth in bathroom.
5. Removes loose rugs from floor, if necessary.
6. Checks for safety devices.
7. Places rubber mats and chairs appropriately.
8. Tests water temperature.
9. Washes hands, as necessary.
10. Puts on gloves, as necessary.
11. Assists client into tub or shower appropriately.
12. Assists client to wash, if necessary.
13. Shampoos hair, if necessary.
14. Assists with drying, if necessary.
15. Assists client out of tub or shower.
16. Drains and cleans tub/shower area.
17. Washes hands.
18. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-4**  
**TURNING THE CLIENT IN BED**

1. Explains procedure to client.
2. Washes hands.
3. Puts on gloves, as necessary.
4. Moves client to appropriate side of bed.
5. Places arms of client correctly.
6. Places legs correctly.
7. Supports legs correctly.
8. Rolls client appropriately from opposite side of bed while ensuring the client's safety.
9. Adjusts pillow for head correctly.
10. Ensures client's comfort.
11. Washes hands.
12. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-5**  
**\*BED BATH**

1. Explains procedure to client.
2. Washes hands
3. Assembles equipment.
4. Provides for privacy and warmth.
5. Puts on gloves, as necessary.
6. Prepares bedding for bath, protecting bed with towels, as necessary.
7. Tests temperature of water.
8. Forms mitt with washcloth.
9. Washes and dries from head to toe; cleanest to least clean.
10. Washes and dries one part at a time.
11. Keeps exposure to a minimum.
12. Soaks and dries hands and feet appropriately.
13. Allows client to participate as much as possible.
14. Changes water when needed.
15. Washes genitals and buttocks last.
16. Applies lotion, if ordered.
17. Assists with dressing.
18. Allows client to rest.
19. Cleans area and equipment.
20. Washes hands.
21. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-6  
SHAMPOO IN BED**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment. Asks client which products to use to prevent allergies or reactions.
4. Makes trough, a hollowed-out depression that allows the water to flow and helps keep the bed dry.
5. Checks room temperature.
6. Places towel appropriately.
7. Places trough appropriately.
8. Puts on gloves
9. Wets hair and works up a good lather, working from front to back. Protect eyes and ears.
10. Rinses thoroughly.
11. Dries hair.
12. Cleans area and equipment
13. Washes hands.
14. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-7  
BACK RUB**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Removes client's clothing.
5. Positions client on stomach or side.
6. Positions self appropriately.
7. Warms lubricant before applying.
8. Lubricates hands.
9. Rubs back with appropriate pressure.
10. Rubs back rhythmically.
11. Rubs back in correct direction.
12. Observes and massages bony or reddened areas.
13. Times procedure according to client's wishes.
14. Removes excess lotion.
15. Assists client with dressing.
16. Returns equipment.
17. Washes hands.
18. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-8  
NAIL CARE**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.

**FINGERNAILS**

1. Soaks client's hands in tepid water.
2. Dries carefully.
3. Pushes cuticles back.
4. Cleans under nails.
5. Files nails, if necessary.
6. Massages hands with lotion.
7. Observes for irritation.
8. Washes hands.
9. Observes, records and reports any changes in condition or behavior.

**TOENAILS**

1. Observes client's feet
2. Soaks feet first if only foot care is being given. (Check Care Plan)
3. Cleans under nails
4. Uses emery board to smooth nails.
5. Washes hands.
6. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-9  
SHAVING THE CLIENT**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Places towel under client's chin.
6. Washes client's face; leaving it wet.
7. Rubs shaving cream into client's beard.
8. Pulls skin tightly in the area to be shaved.
9. Shaves, using gentle, short strokes in the same direction.
10. Rinses razor often.
11. Rinses face.
12. Pats face dry.
13. Applies after-shave lotion.
14. Washes hands.
15. Observe, record and report any skin irritations, redness, scaling, etc. to the supervisor.

**Electric Razor Procedure:**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Washes face with soap and water and dries.
6. Shaves with electric razor.
7. Applies after-shave lotion if client desires.
8. Washes hands.
9. Observe, record and report any skin irritations, redness, scaling, etc. to the supervisor

**Checklist for Procedure XII-10**  
**\*MOUTH HYGIENE AND CARE**

**CLIENTS WHO CAN BRUSH OWN TEETH**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Provides rinse water.
6. Gives client tissue/towel for wiping.
7. Observes client to ensure proper tooth care.
8. Observes, records and reports any changes in condition or behavior.

**CLIENTS UNABLE TO BRUSH OWN TEETH**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Places client upright or on side.
6. Places towel under head.
7. Places basin at side of head.
8. Brushes teeth gently with up and down circular strokes.
9. Helps client rinse mouth.
10. Ensures mouth and neck are dry.
11. Helps make client comfortable.

12. Cleans and stores supplies.
13. Washes hands.
14. Observes, records and reports any changes in condition or behavior.

## **DENTURE CARE**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Receives dentures from client in tissue or breaks suction and removes dentures with a tissue.
6. Places dentures in a water-filled container.
7. Carries dentures to sink.
8. Cushions sink with washcloth and adds water.
9. Cleans dentures appropriately.
10. Assists client in rinsing mouth.
11. Applies denture cream or adhesive as needed.
12. Inserts dentures in client's mouth or stores dentures in water without adhesive.
13. Wipes client's mouth.
14. Washes hands.
15. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-11**  
**ASSISTING WITH EATING**

1. Explains the procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts gloves on, as necessary.
5. Arranges food attractively on the plate.
6. Allows the client to choose foods to be eaten.
7. Encourages the client to do as much as capable. Assists only when it is necessary.
8. Cuts food into small pieces if the client is unable.
9. Uses forks and spoons gently.
10. Wipes the client's mouth, if needed.
11. Uses straws or a training cup for liquids.
12. (For visually impaired) Explains where food is located on plate, and what is on eating utensil.
13. Feeds to the strong side (in case of a facial weakness or paralysis on one side).
14. Washes hands.
15. Observes, records and reports any changes in condition or behavior.

## **Checklist for Procedure XII-12**

### **ASSISTING WITH DRESSING**

1. Explains procedure to client.
2. Washes hands.
3. Assembles clothes in the order they are to be put on.
4. Puts on gloves, as necessary.
5. Encourages and allows the client to do as much self-dressing as possible.
6. Assists when the client asks or shows signs of fatigue, frustration, or inability to perform the task.
7. Washes hands.
8. Observes, records and reports any changes in condition or behavior.

### **FOR CLIENTS WHO ARE PARTIALLY PARALYZED, WEAK, OR FRAIL**

1. Explains procedure to client.
2. Washes hands.
3. Assembles clothing in the order they are to be put on.
4. Puts on gloves, as necessary.
5. Moves client to center of bed.
6. Removes night clothing, if necessary.
7. Covers client with a sheet.
8. Uncovers upper body first.
9. Assists with shirt.
10. Uncovers lower body.
11. Assists with underpants or shorts and remainder of clothes.
12. Assists with socks and shoes as needed.
13. Washes hands.
14. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-13**  
**ASSISTING WITH THE USE OF ELASTIC SUPPORT STOCKINGS**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. If client has been up and around have client lie down with legs elevated for 15 minutes before applying stockings.
6. Makes sure legs are clean and dry. The legs may be lightly powdered or, if the skin is dry, lotion may be used.
7. Puts on stockings as Care Plan directs: smoothly with no wrinkles.
8. Makes sure heel of foot is in heel of stocking.
9. If stockings have no toe opening, pulls on the tip of stocking to relieve pressure.
10. Removes at least once a day or as frequently as directed by the Care Plan. Bathe the skin underneath, dry, and reapply.
11. Observes for changes in skin color, skin temperature, swelling, or sores on legs.
12. Washes hands.
13. Records use, changes in skin color, skin temperature, swelling, or sores on legs, and client complaints.
14. Reports any changes in skin color, skin temperature, swelling, or sores on legs, and client complaints.

**Checklist for Procedure XII-14**  
**\*HELPING THE CLIENT TO WALK**

1. Explains procedure to client.
2. Reassures client.
3. Instructs client regarding shoes to wear.
4. Assists client in practicing standing and shifting weight.
5. Walks slowly, taking small steps.
6. Walks with client on client's weak side using correct positioning.
7. Walks for short distances.
8. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-15  
MAKING AN UNOCCUPIED BED**

1. Washes hands.
2. Assembles equipment.
3. Puts on gloves, as necessary.
4. Removes and folds bedding to be re-used.
5. Smooths mattress pad.
6. Places bottom sheet in correct position.
7. Tucks in top.
8. Meters corner.
9. Tucks in side.
10. Positions top covers correctly.
11. Tucks in at bottom.
12. Meters corner.
13. Goes to opposite side of bed.
14. Repeats steps 4 to 10, pulling and smoothing sheets.
15. Adds spread, and tucks in at bottom.
16. Turns soiled pillowcase inside out.
17. Opens clean pillowcase.
18. Grasps clean pillowcase in center of bottom seams.
19. Folds pillowcase over hand.
20. Grasps end of pillow through pillowcase in the center.
21. Pulls clean case over pillow with other hand.
22. Removes soiled linen.
23. Washes hands.

**Checklist for Procedure XII-16**  
**\*MAKING AN OCCUPIED BED**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Removes and neatly folds bedspread.
6. Loosens bedding on one side.
7. Loosens top sheet at foot.
8. Slides top sheet under blanket, leaving blanket on client.
9. Removes all pillows except one under client's head.
10. Turns client onto side.
11. Folds/rolls bottom sheet(s) up to and under client's head, back, and legs.
12. Smooths mattress.
13. Positions clean bottom sheet.
14. Folds clean bottom sheet next to and under soiled sheets.
15. Tucks in bottom sheet at head.
16. Mitters corner at head.
17. Tucks in bottom sheet along side.
18. Positions draw sheet, folds under soiled bottom sheet, and tucks in along side.
19. Turns client to clean side of bed.
20. Goes to opposite side of bed.
21. Loosens and removes bedding.
22. Places soiled linen appropriately.

23. Smooths mattress pad.
24. Pulls clean linen through and straightens.
25. Tucks in at head, corner, and sides.
26. Removes soiled pillowcases appropriately.
27. Puts on clean pillowcases correctly.
28. Removes soiled linen.
29. Washes hands.
30. Observes, records and reports any changes in condition or behavior.

## **Checklist for Procedure XII-17**

### **\*USE OF A BEDPAN**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Warms and powders bedpan.
6. Places protector pad near client's hips.
7. Places bedpan on bed near client's hips.
8. Maintains client's privacy.
9. Assists client in lifting hips or assist client to roll if unable to lift hips.
10. Places bedpan under hips.
11. Assists client to sit, if possible.
12. Provides toilet paper and call signal.
13. Assists verbally or manually with wiping, if necessary.
14. Assists client in raising hips.
15. Removes bed pan carefully.
16. Assists client to wash hands.
17. Adjusts bed cover.
18. Removes bedpan to bathroom.
19. Observes, measures (if indicated), and disposes of contents.
20. Cleans bedpan.
21. Washes hands.
22. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-18**  
**USE OF URINAL**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Maintains client's privacy.
6. Places bed protector under client's hips.
7. Gives client urinal.
8. Places urinal to collect urine.
9. Provides toilet paper and signal bell.
10. Assists with hand washing, as necessary.
11. Empties urinal.
12. Cleans urinal.
13. Washes hands.
14. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-19**  
**ASSISTING WITH THE USE OF THE CONDOM CATHETER**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves.
5. Maintains client's privacy.
6. Exposes genital area only.
7. Washes and dries penis carefully.
8. Observes skin of penis for sores.
9. Attaches condom to tubing, if necessary.
10. Rolls condom catheter onto penis as directed on the Care Plan or by supervising nurse.
11. Checks that tubing is one to two inches below tip of penis.
12. Checks that tip of condom is not twisted
13. Washes hands.
14. Records the application of condom catheter and presence of sores or raw areas.
15. Reports presence of any sores or raw areas on or around penis.

**Checklist for Procedure XII-20**  
**ASSISTING WITH CLEANING THE SKIN AND CATHETER TUBING**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves.
5. Maintains client's privacy.
6. Places client on his/her back so that the catheter and urinary opening are exposed.
7. Puts towel or disposable bed protector under client.
8. Washes the genital gently with soap and water. Does not pull on the catheter, but holds with one hand while wiping it with the other. Gently pushes back foreskin on uncircumcised male before cleaning.
9. Observes area around the catheter for sores, crusting, leakage, or bleeding.
10. Dries area with a towel.
11. Cleans the catheter tubing as directed by the Care Plan starting with the tubing nearest to the client.
12. Positions the client so that the catheter and tubing do not pull and are free from kinks or pulling.
13. Tapes tubing to the client as directed in the Care Plan.
14. Disposes of dirty water into the toilet.
15. Discards any disposable equipment.
16. Removes the bed protector or towel.
17. Cleans and stores re-usable equipment.
18. Washes hands.
19. Records time catheter care was done.
20. Observes, records and reports any changes in condition or behavior.

### **Checklist for Procedure XII-21**

#### **ASSISTING WITH THE EMPTYING OF THE URINARY DRAINAGE BAG**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves.
5. Puts measuring pitcher below the drainage bag.
6. Observes condition of tubing: clear or has particles in it.
7. Takes the drainage tube on the bag out of its holder.
8. Unclamps and opens the drainage tube on the bag being careful not to touch the end of the tube.
9. Drains urine from the bag into a container.
10. Cleans the end of the drainage tube as directed by the Care Plan.
11. Clamps the drainage tube and puts it back into its holder being careful not to touch the end with hand or anything else.
12. Measures the amount of urine, if directed by the Care Plan.
13. Observes the color, odor of the urine, whether mucus or blood was present in the urine, and condition of the drainage bag.
14. Empties urine into the toilet.
15. Rinses pitcher with cool water. Cleans with soap and brush.
16. Stores clean pitcher.
17. Washes hands.
18. Records amount of urine (if directed by the Care Plan) and observations.
19. Reports cloudy, strong smelling, or bloody urine. Reports if there is only a small amount or no urine in the drainage bag when it is scheduled to be drained.

**Checklist for Procedure XII-22  
POSITIONING THE CLIENT IN BED**

**CLIENT ON BACK**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Centers client safely in bed.
6. Turns client safely on back.
7. Aligns client's body.
8. Places pillows or folded towels appropriately:
  - under head;
  - under small of back;
  - alongside hips.
9. Positions arms appropriately.
10. Supports and covers feet appropriately.
11. Makes client comfortable and safe.
12. Washes hands.
13. Observes records and reports any changes in condition or behavior.

**CLIENT ON SIDE**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Centers client safely in bed.

6. Turns client onto side.
7. Aligns client's body.
8. Places pillows or folded towels/blankets appropriately:
  - under head and neck;
  - at back;
  - under top leg and foot;
  - under top arm.
9. Positions hips and legs appropriately.
10. Positions shoulders and arms appropriately.
11. Covers client, making comfortable and safe.
12. Washes hands.
13. Records and reports appropriately.

#### **CLIENT ON ABDOMEN**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Moves client to side of bed.
6. Turns client onto abdomen.
7. Aligns head and turns to side.
8. Place pillow under client's head.
9. Place arms appropriately.
10. Supports lower legs and feet.
11. Covers client appropriately.
12. Washes hands.
13. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-23**  
**TRANSFER TO THE SITTING POSITION IN BED**

1. Explains procedure to client.
2. Washes hands.
3. Puts on gloves, as necessary.
4. Faces head of bed, outer foot forward.
5. Raises head of bed or locks arms with client.
6. Has client bend knees.
7. Pulls client to sitting position by rocking.
8. Places pillows behind head.
9. Checks client for dizziness, weakness, etc.
10. Washes hands.
11. Observes, records and reports any changes in condition or behavior.

### **Checklist for Procedure XII-24**

#### **HELPING THE CLIENT TO SIT AT THE SIDE OF THE BED**

1. Explains procedure to client.
2. Washes hands
3. Puts on gloves, as necessary.
4. Rolls the client on side facing self. Bends client's knees.
5. Reaches one arm over to hold him/her in back of knees.
6. Places other arm under the neck and shoulder area.
7. Positions feet with a wide base of support.
8. On the count of "three" shifts weight to back leg. While doing this, swings the client's legs over the edge of the bed while pulling his/her shoulders to a sitting position.
9. Remains in front of the client with both hands on him/her until is sure the client is able to safely sit alone.
10. Washes hands.
11. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-25**  
**HELPING A CLIENT TO STAND**

1. Explains procedure to client (client is sitting at edge of bed).
2. If necessary, puts bed in lowest position.
3. Washes hands.
4. Puts on gloves, as necessary.
5. Places one foot forward between client's feet. If the client has a weak knee, braces knee against his/hers.
6. Tells client to put strongest foot under him/her self.
7. Bends knee and leans onto forward foot. Places both arms around the client's waist. Holds client closely.
8. Tells client to push down on bed with arms and lean forward. On the count of "one – two – three", assists client to stand. Assists client by rocking weight to back foot and lifting as reaches three. Supports client until is sure he/she is able to safely stand alone.
9. Washes hands.
10. Observes, records and reports any changes in condition or behavior.

### **Checklist for Procedure XII-26**

#### **\*TRANSFER TO WHEELCHAIR, CHAIR, OR COMMUNE**

1. Explains procedure to client.
2. Washes hands.
3. Puts on gloves, as necessary.
4. Angles wheelchair next to bed.
5. Locks brakes.
6. Places safety belt on client, if needed.
7. Dangles client's legs over side of bed.
8. Stands client up.
9. Rotates client until back is facing wheelchair.
10. Backs up client until client feels the chair with the back of legs.
11. Maintains good body mechanics.
12. Lowers client into wheelchair.
13. Adjusts footrests.
14. Releases brakes.
15. Covers client as needed.
16. Washes hands.
17. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-27**

**POSITIONING CLIENT IN CHAIR OR WHEELCHAIR**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Places client's hips back in chair.
6. Places feet appropriately.
7. Checks for position of male genitals.
8. Places pillows appropriately.
9. Supports arms.
10. Makes client comfortable and safe.
11. Washes hands.
12. Observes, records and reports any changes in condition or behavior.

## **Checklist for Procedure XII-28**

### **TRANSFER FROM WHEELCHAIR TO TOILET**

1. Explains procedures to client
2. Washes hands.
3. Puts on gloves, as necessary.
4. Checks bathroom for supports and grab bars.
5. Places wheelchair, facing toilet.
6. Locks wheels.
7. Raises footrests.
8. Assists client to stand.
9. Rotates client until back is toward toilet.
10. Arranges clothing.
11. Assists client to sit on toilet.
12. Allows privacy.
13. Assists in cleaning client after toileting.
14. Washes hands.
15. Reverses steps six to nine.
16. Assists client to wash hands.
17. Washes hands.
18. Observes, records and reports any changes in condition or behavior.

### **Checklist for Procedure XII-29**

#### **TRANSFER FROM WHEELCHAIR TO SHOWER AND ASSISTING WITH SHOWER**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment
4. Puts on gloves, as necessary.
5. Positions wheelchair at appropriate angle to shower.
6. Places towel on shower chair/stool.
7. Locks wheels.
8. Raises footrests.
9. Stands client up appropriately.
10. Pivots client so back is toward shower chair.
11. Assists client to sit in shower chair.
12. Places toilet articles within client's reach.
13. Allows client privacy.
14. Ensures that soap is rinsed off client.
15. Assists in drying client.
16. Gets clean clothing ready.
17. Reverses steps seven to nine.
18. Covers client to avoid chilling.
19. Washes hands.
20. Observes, records and reports any changes in condition or behavior.

### **Checklist for Procedure XII-30**

#### **TRANSFER FROM WHEELCHAIR TO STOOL OR CHAIR IN TUB**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Places not-slip mat in tub.
6. Places covered chair/stool in tub.
7. Fills tub with water.
8. Positions chair parallel to tub.
9. Provides for privacy.
10. Assists in removing clothing.
11. Assists client in sliding to edge of tub.
12. Pushes wheelchair out of the way.
13. Assists client onto chair in tub.
14. Assists with bathing and drying upper body.
15. Reverses steps ten to twelve.
16. Dries lower body.
17. Assists with dressing and grooming.
18. Makes client comfortable and safe.
19. Cleans area.
20. Washes hands.
21. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-31  
WEIGHING A CLIENT**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Checks that the needle of the scale is at “0”. If not, re-adjust.
6. Helps client onto scale.
7. Provides support while client steadies self.
8. Notes weight after dial stops moving.
9. Observes for any problems the client has during this procedure, such as inability to stand on scale.
10. Helps client off the scale.
11. Records the weight.
12. Reports any changes in any condition or behavior (such as a gain or loss of more than five pounds or client concerns about weight).
13. Stores the equipment in a safe place.

**Checklist for Procedure XII-32**  
**MEASURING INTAKE**

1. Explains to client the need to keep track of intake. Gets client's cooperation by asking client to tell when they have had something to drink and to report how much they have had.
2. Washes hands.
3. Assembles equipment.
4. Serves liquids in containers (bowls, glasses, or cups), measured ahead of time.
5. Measures serving containers ahead of time:
6. Assembles equipment (measuring cup, bowl, cup and/or glasses that will be used each time client drinks or eats something; paper; and pencil).
  - a. Fills first serving container with water.
  - b. Pours water into measuring cup.
  - c. Writes down this amount on paper.
  - d. Discards water.
  - e. Repeats steps b, c, d, and e for each serving container.
  - f. Keeps this list for use each time client's intake is measured.
7. Writes down types and amounts of liquids served to client.
8. When client is finished, removes serving containers.
9. Measures each type of liquid that is left.
10. Subtracts leftover amount from amount served to client. Adds all of these together. Writes this down.
11. Cleans measuring and serving equipment.
12. Stores measuring and serving equipment.
13. Washes hands.
14. Records total amount of intake for a particular time.
15. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-33**  
**MEASURING URINARY OUTPUT**

1. Explains to client the need to measure urinary output. Asks client to use bedpan, urinal, or commode when has the urge to pass urine. Gets client's cooperation by asking client to report when has to pass urine. (This will not be necessary if client has urinary drainage bag.)
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as needed.
5. Pours or drains urine from bedpan, urinal, commode, or urinary drainage bag into measuring pitcher that is on flat surface.
6. Records amount that is in pitcher or urinary drainage bag.
7. Discards urine unless a specimen is needed.
8. Cleans re-usable equipment.
9. Stores re-usable equipment.
10. Washes hands.
11. Observes records and reports any changes in condition or behavior, such as strong smelling urine, cloudy urine, blood in the urine, very small amount of urine, or if client has pain or difficulty when passing urine.

### **Checklist for Procedure XII-34**

#### **ASSISTING WITH CHANGING A CLEAN DRESSING (using Standard Precautions)**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Provides privacy.
5. Assists client to comfortable position.
6. Provides good lighting.
7. Removes clothing over dressing, if necessary.
8. Places waste bag near client for disposal of dressing/waste products.
9. Puts on gloves.
10. Removes wrappings from new dressing.
11. Cuts tape.
12. Removes and discards old dressing and used gloves.
13. Washes hands.
14. Puts on new gloves.
15. Cleans skin around wound according to directions on Care Plan.
16. Hands requested items to client.
17. Applies new dressing to wound.
18. Tapes new dressing in place.
19. Removes and discards waste bag.
20. Washes hands.
21. Stores unused supplies.
22. Observes, records and reports any changes in condition or behavior, such as changes in the appearance of the wound.

**Checklist for Procedure XII-35  
HANDLING THE INFANT**

**PICKING UP AN INFANT**

1. Washes hands.
2. Puts on gloves, as needed.
3. Puts one hand under buttocks.
4. Puts other hand under head, neck, and shoulders.
5. Raises baby appropriately.

**SHIFTING BABY TO “FOOTBALL” HOLD**

1. Supports baby’s head, neck, and buttocks.
2. Swing baby to the side so that infant rests on hip while the hand and arm cradle the infant, providing support.
3. Washes hands.
4. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-36  
INFANT BATH**

1. Washes hands.
2. Assembles equipment.
3. Ensures proper temperature of room.
4. Prepares changing area.
5. Prepares bath water at correct temperature.
6. Puts on gloves, as needed.
7. Brings baby to bath area.
8. Undresses and covers baby.
9. Lowers baby into water.
10. Shampoos, rinses, and dries head.
11. Washes body, going from head to foot.
12. Washes genitals correctly.
13. Dries baby.
14. Applies lotion as directed on Care Plan.
15. Diapers and dresses baby.
16. Gives nail care, if needed.
17. Washes hands.
18. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-37**  
**ASSISTING WITH THE USE OF THE HYDRAULIC LIFT**

1. Explains procedure to client.
2. Washes hands
3. Assembles equipment.
4. Puts on gloves, as needed.
5. Checks whether valves are working on lift.
6. Clears the floor around the area you are working.
7. Opens legs of lift stand to widest position.
8. Brings wheelchair or chair close to bed. Locks wheels of wheelchair and bed (if hospital bed).
9. If possible, raises or lowers height of bed to accommodate height of lift.
10. If available, raises side rails on far side of bed.
11. Rolls one edge of the sling up to one-half of width.
12. Places sling on bed on the far side of the client. Sling should be midway between head and thigh of client.
13. Rolls the client toward self and moves sling so it covers one-half of client's back.
14. Rolls client back onto the sling and over on other side (over the hump of the sling).
15. Keeping the client rolled away from self, unrolls the sling, making sure it is flat and unwrinkled.
16. Rolls client onto back and adjusts sling so that it is midway between client's head and thigh.
17. Raises the lift (closes valve and pumps up the lift arm).
18. Steadies the swinging bar as it is positioned over the client.
19. Lowers arm and attaches the chains or hangers to the sling (longer chain to the thigh part of the sling and shorter chain to the head area), being sure the chain or hangers are away from the client's body.

20. Tells client when starting to pump up the lift.
21. After lifting the client a few inches and before moving the lift away, checks all connections to make sure they are fastened tightly and working properly.
22. Pumps up the lift until the client is in a half-sitting position.
23. Lifts client's feet and removes from bed.
24. Moves to the handles or bar of the lift for steering.
25. Gently and slowly moves the base of the lift out from under the bed, and slowly turns it toward the wheelchair or chair.
26. Positions the lift so client is over the wheelchair or chair.
27. Lowers the client to the seat by slowly opening the valve until client is just above the seat.
28. Holds the sling near the head and puts knees against the client's knees. Supports the client's upper body against self. Uses knees to push gently on the client's knees. Then, releases the valve so that the client sits in the wheelchair or chair.
29. Removes the S-shaped hooks while holding onto the bar.
30. Closes the valve and pumps the lift up out of client's way.
31. Moves lift away.
32. Washes hands.
33. Observes, records and reports any changes in condition and behavior or problems with equipment.

**Checklist for Procedure XII-38**  
**SLIDE BOARD TRANSFER PROCEDURE**

1. Explains procedure to client.
2. Washes hands.
3. Assembles equipment.
4. Puts on gloves, as necessary.
5. Places wheelchair or chair at a 45 degree angle to the bed or alternate chair.
6. If wheelchair, locks brakes and removes armrest if able.
7. If client is without clothing, the board should be covered with a pillowcase.
8. Places slide board like a bridge between bed and wheelchair, chair to chair, etc.
9. Has client lean away from slide board.
10. Places slide board under buttocks, transferring towards the client's strong side if possible.
11. Ensures that the slide board is securely placed before client begins transfer.
12. Directs client to place hands on the slide board at each side adjacent to thighs.
13. Directs client to take a series of small push-ups across the board until client reaches the other side of the board.
14. Assists client, as necessary, with each push-up.
15. Uses gait belt, as necessary.
16. Cleans and stores slide board when transfer is complete.
17. Washes hands.
18. Observes, records and reports any changes in condition or behavior.

**Checklist for Procedure XII-39**  
**\*CHECKING THE RIGHT PERSON**

1. Washes hands.
2. Reads the container label.
3. Checks the name on the label to make sure it is the same as the client's name.
4. Checks the name on the label against the name on the Care Plan.
5. If they are the same, gives container to client and/or assists with administration as ordered on the Care Plan.
6. If they are not the same, contacts supervisor for further instructions:
7. Explains to client the reason for this.
8. Records and reports any problems about the medication in question.

**Checklist for Procedure XII-40**  
**\*CHECKING THE RIGHT MEDICATION**

1. Washes hands.
2. Reads the container label.
3. Checks the expiration date.
4. Checks the name of the medication on the label to make sure it is the same as the medication name on the Care Plan.
5. If they are the same, gives container to client and/or assists with administration as ordered by the Care Plan.
6. If they are not the same, contacts the supervisor for further instructions:
7. explains to client the reason for this.
8. Records and reports any problems about the medication in question.

**Checklist for Procedure XII-41**  
**\*CHECKING THE RIGHT DOSE**

1. Washes hands.
2. Reads the container label.
3. Checks the dose on the label against the dose for that medication on the Care Plan.
4. If they are the same, gives container to client and/or assists with administration as ordered by the Care Plan.
5. If they are not the same, contacts the supervisor for further instructions:
  - explains to the client the reason for this.
6. Records and reports any problems about the medication in question.

**Checklist for Procedure XII-42**  
**\*CHECKING THE RIGHT TIME**

1. Washes hands.
2. Reads the container label.
3. Checks the time for taking the medication against the time specified in the Care Plan.
4. If they are the same, gives container to client and/or assists with administration as ordered by the Care Plan.
5. If they are not the same, gives container to client and/or assists with administration as ordered by the Care Plan.
6. Explains to the client the reason for this.
7. Records and reports any problems about the medication in question.

**Checklist for Procedure XII-43**  
**\*CHECKING THE RIGHT ROUTE**

1. Washes hands.
2. Reads the container label to determine if it lists any information regarding the route by which the medication should be given.
3. Checks the Care Plan to determine the route that is specified for the medication.
4. If available, checks to make sure the route specified on the label matches the route specified on the Care Plan.
5. Gives the container to the client and/or assists with administration as order in the Care Plan if:
  6. the route is specified in the Care Plan; or
    - a. the route specified in the Care Plan and on the label match.
    - b. If they are not the same or there is no information, contact the supervisor for further instructions:
      - Explains to the client the reason for this.
7. Records and reports any problems about the medication in question.

APPENDIX D  
SUMMARY FORM

**SUMMARY EVALUATION FORM**

Name of Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Score on the Interview (Pass/Fail) \_\_\_\_\_

Final Score on Written Exam \_\_\_\_\_

Performance Demonstrations (Pass/Fail) \_\_\_\_\_

\_\_\_\_\_. Successfully completed all components of ACD and is eligible for a certificate as a Personal Care Aide.

\_\_\_\_\_. Did not successfully complete the required components of ACD and may not be employed as a Personal Care Aide until successful completion of a Department approved Personal Care Aide training course.

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Comments on the performance of the applicant related to the recommendations for certification, or referral to full basic training.

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Testing Agency

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Test Administrator