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**CALLING ALL CAREGIVERS SUMMIT**  
**February 8-14, 2021**

To all Caregivers,

First and foremost, I hope that you and your loved ones are staying safe and healthy. Also, I want to thank you for participating in the Calling All Caregivers Summit. It is a privilege for me to be part of the Summit.

**THINKING OF HIRING A PRIVATE CAREGIVER? BEST PRACTICES  
TO FOLLOW**

- I. Practices to Consider When Hiring a Private Caregiver.
  - a. Develop a Plan;
  - b. Get the Family to Buy In;
  - c. Employee or Independent Contractor;
  - d. Selection of Candidates;
  - e. Documentation as part of the Hiring Process;
  - f. Background Checks;
  - g. Put the Terms in Writing;
  - h. Documentation; and
  - i. Managing the Employment/Contractor Relationship.
  
- II. Develop a Plan.
  - a. Objective plan based on facts not emotions;
  - b. Objective information includes:
    1. Information from healthcare providers;
    2. A Home Health Care Assessment;
    3. Friends and family members;
    4. Ask all of the above for recommendations; and

5. Use this information not only to develop a plan but also a job description for the Caregiver.

### III. Get the Family to Buy In.

- a. Getting Family Members On Board is Essential;
- b. Hold Family Meeting(s);
- c. Who has or will have power of attorney, healthcare power of attorney and the living will;
- d. Prevent misunderstandings about bequests and inheritance; and
- e. The plan if the recipient can no longer be safely cared for in the home.

### IV. Employee or Independent Contractor.

#### a. Employee:

1. You control the terms, conditions, and direction of the work;
2. As the employer, you will be subject to the laws and regulations governing employment;
3. You would be responsible for withholding payroll taxes and other withholdings and submitting those amounts;
4. Unemployment compensation insurance;
5. Workers' Compensation;
6. Record keeping requirements.

#### b. Independent Contractor.

1. The more control you retain over the direction of the work, the less likely the Caregiver is an independent contractor;
2. Caregiver is responsible for taxes and withholdings;
3. Caregiver is responsible for unemployment insurance and Workers' Compensation;
4. Governed by contract law and wage and hour regulations, laws, and decisions;
5. Record keeping requirements.

### V. Selecting a Caregiver.

- a. Draft a detailed job description;

- b. Job Application: short, thorough and to the point;
- c. Background checks;
- d. Reference checks;
- e. Proof of credentials and resumes;
- f. Interviewing candidate and taking objective notes; and
- g. Reviewing and selecting a Caregiver from the candidates:  
Articulate why you chose this candidate.

VI. Documentation.

- a. Signed application and resume;
- b. Background check;
- c. Reference checks;
- d. Signed employment agreement;
- e. Form I-9;
- f. Form W-4;
- g. Ohio New Hire Form (on line);
- h. Emergency contact information;
- i. Payroll/Direct deposit information; and
- j. Maintain accurate records of hours worked and paid.

VII. The Employment Agreement.

- a. It is a contract so put it in writing;
- b. Tailor it to your particular situation. Do not just pull a contract off the internet.

Let me know if you have questions. Thank you again for your participation in the Summit and all that you do as a Caregiver.

*Paul J. Corrado*