

Elder Companion: Lesson 1—Roles and Responsibilities¹

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The [Elder Companion training program](#) is designed to train persons interested in becoming employed by local service providers as sitter/companions for the elderly. The objective of the program is to help participants develop the necessary skills to provide high-quality care including assistance with daily living activities (DLAs), home management services and companionship for the elderly adult.

This training course is preparatory to studying to become a certified nursing assistant (CNA).

For an overview of the training course, see [FCS5246/FY586](#).

In the Elder Companion training program, the following topics are addressed:

- Lesson 1 Roles and Responsibilities
- Lesson 2 Aging
- Lesson 3 Communication
- Lesson 4 Nutrition
- Lesson 5 Home Maintenance and Safety
- Lesson 6 Stress Management
- Lesson 7 Time Management
- Lesson 8 Leisure Activities
- Lesson 9 Getting a Job

In addition to the nine topics which are taught as Lessons 1 through 9 in a classroom setting, training program participants will be required to make a field observation at an elder care facility. An Agent's guide and observation form are provided in Attachment 1. (See training course overview [FCS5246/FY586](#).)

Agent's Teaching Guide

Roles and Responsibilities of an Elder Companion

Part 1: Overview of Training

Part 2: Job Responsibilities

Time: 3 to 3 ½ Hours

Instructors: County Faculty and/or Person from Hiring Agency

Equipment/Supplies: Video of *Driving Miss Daisy* (available on YouTube), flip chart and paper and/or whiteboard, markers, PC/laptop, overhead projector (or alternative method to display slides), PowerPoint slides created from Handouts C through J; notebook with dividers for each participant to keep materials presented and discussed in each class

Handouts

Part 1

- Handout A: Registration
- Handout B: Elder Agreement

Part 2

- Handout C: Roles and Responsibilities of an Elder Companion
- Handout D: Client's Bill of Rights
- Handout E: Personal Appearances Guidelines
- Handout F: Personal Qualities of Elder Companion
- Handout G: General Guidelines for Elder Companion
- Handout H: Ethics
- Handout I: General Do's and Don'ts for the Elder Companion
- Handout J: Do's and Don'ts for Specific Situations
- Handout K: Emergency Addresses and Phone Numbers
- Handout L: Daily Log of Companion activities

Objectives (Expected Outcomes)

After this session, participants will be able to:

- Describe the role of homemaker/companion when providing care and assistance to an elderly person.
- Identify clients' rights, and
- Identify general and personal expectations of companions.

Part 1: Overview of Training Lesson Plan

Introduction and Overview

- Introduce yourself.
- Conduct get-acquainted/bonding exercise.
- Give program overview:

The Elder Companion course is designed to improve your knowledge and skills in caring for older persons in their home. This program is for individuals interested in increasing their employment opportunities in this area.

The thirty-seven hour training covers roles and responsibilities, communication, the aging process, nutrition, home maintenance, time and stress management, and field observation.

Discuss overall objectives of Elder Companion Training for each participant to

- Successfully complete the thirty-seven hours of the Elder Companion training course.
- Receive a Certificate of Completion.
- Increase knowledge and skills in caring for older persons.
- Learn about employment opportunities.
- Have the opportunity for name and phone number to be given to persons wishing to employ an elder companion.
- Increase knowledge of community resources to support elder care.
- Understand that the Florida Cooperative Extension Service provides training but has no legal obligation for performance and actions by home care companions.

Discuss format of classes

- Presenters
- Hours and locations of classes
- Breaks and lunch
- Knowledge and skills test—a score of 80 is passing
- Pass out the notebook for participants to keep their materials in.
- Have participants complete and collect the following:
 - Registration (Handout A).
 - Elder Companion Agreement (Handout B).

Registration Form Handout A

Please fill in the following information about yourself:

Name: _____

Phone: _____

Address: _____

Age (check one):

18–35____, 36–55____, over 55____

Sex: Male____ Female____

Education (check one):

8th grade or less ____

9th–11th grade ____

high school graduate____

some college ____

college graduate____

other_____

Employment (check all that apply). Are you now

____Employed as home companion full time

____Employed as home companion part time

____Employed in another job (specify)_____

____Not employed

____Caring for family member/friend

____Concerned about future care of a family member/friend

____Interested in future employment as home companion

____Volunteering as a home companion

____Other (specify)_____

Contact in case of emergency while attending Elder Companion training:

Name: _____

Phone: _____

Address: _____

Agreement Handout B

As a condition of my participation in the Elder Companion Program, I waive any liability against the Cooperative Extension Service and their respective officers, employees, agents, and volunteers and agree to hold harmless for injury or damage to person or property that might arise in conjunction with any services I might perform as an Elder Care Companion.

I acknowledge that this educational program does not qualify me as a home health aide or as a practical, professional or licensed nurse, or as any type of medical practitioner, nor will I hold myself out to the public as a medical professional or paraprofessional.

I also acknowledge that I have been advised to consult my own legal and liability insurance counsel, realizing that the above mentioned parties are not, either individually or collectively, responsible in any way for my proper or

improper use or misuse of any idea, concept, technique, or method that is taught, shown, explained, demonstrated, or otherwise presented in the training clinic.

Participant

Witness

Date

Part 2: Roles and Responsibilities of an Elder Companion Lesson Plan

Introduction:

We are going to start our training by learning about the roles and responsibilities of an Elder Companion.

DO

Solicit response from participants by saying ... “There is an increasing need for companions for elderly citizens. Why do you think this might be so?” Tell the class, “I’ll write down your answers on this whiteboard/flip chart.” Allow time for them to answer. Some possible replies: people are living longer; people are being discharged earlier from hospitals; increased cost of nursing home care; family members need to work outside the home; changing society; people may not live near family members.

After the list is generated ask the class to close their eyes. Say, “Imagine that you are elderly and that someone has to come into your home to take care of you. What feelings do you have about this? What would be important to you as an elderly person at home?” Write down on whiteboard/flip chart what participants say. Allow time for them to answer. Some examples: security; safety; privacy; trustworthiness; honesty; friendliness; caring attitude; competence; someone who lets me participate in decision making; respect for me; someone to listen, talk with; someone who knows I’m still in charge, it is my home.

Next, tell the class, “When a person is elderly, there is a possibility that someone could take advantage of them. Because of this, laws have been set up to protect clients, sometimes called a ‘client’s bill of rights.’” Use Handout B, *Client’s Bill of Rights*, and compare with the list the participants have created. NOTE: Stress the items in the list that refer to confidentiality. Tell the class that if the home care organization has developed a privacy notification in compliance with the Health Insurance Portability Act (HIPAA) that they should obtain a copy for their client.

Say to the class, “These things we have talked about. Let us see how it might be to step into a client’s shoes and remember how we would feel in the same situation.”

Have the class view clips from the *Driving Miss Daisy* movie showing activities of a companion. Before viewing, tell the class you’d like them to write down any of the jobs/activities they see a companion doing. After the video, solicit from participants what they wrote down. Write these on the whiteboard/flip chart. Show PowerPoint slide created from Handout D, *Roles and Responsibilities of an Elder Companion* and distribute the handout to summarize the discussion.

Show slides from Handouts E through H and distribute the handouts to the class. Discuss the importance of *personal appearance* (Handout E); *personal qualities* (Handout F); *general guidelines* (Handout G); and *ethics* (Handout H).

Show the slide created from Handout I, *General Do’s and Don’ts for the Elder Companion*. Distribute the handout and discuss the general guidelines with the class.

Along with the general roles and responsibilities there are some specific “Do’s and Don’ts” for elder companions. Show the transparency created from Handout J, *Do’s and Don’ts for Specific Situations*. It is important to review them completely with the students. Some role playing of various situations could be helpful. The discussion about giving medications may need additional review.

Have the participants brainstorm “emergency” situations that might arise with an elderly person. Use a flip chart to list. Divide the group into small groups to discuss possible responses to each of the situations. Have groups share with the entire group and determine an appropriate response. Give each person a copy of Handout K, *Emergency Addresses and Phone Numbers*.

Distribute Handout L, *Daily Log of Companion Activities*, and discuss how to use it.

Ask “What sorts of things will you need to learn in this program so that you can be a companion?” Write down all the responses on the whiteboard/flip chart. Overview the various sections of the curriculum. Assure the class that they will be learning these things.

Client’s Bill of Rights Handout C

1. The right to receive considerate and respectful care in the home.
2. The right to be fully informed in advance and in writing about the care to be provided.
3. The right to refuse care and services.
4. The right to receive information about the home care organization’s policies and procedures.
5. The right to request a change of caregiver.
6. The right to confidentiality of client records and information.
7. The right to privacy.
8. The right to be fully informed regarding costs orally and in writing, before care begins.

- The right to be informed orally and in writing concerning any changes in care.
- The right to be informed of the process for voicing grievances about service.
- The right to know that the organization providing care maintains liability insurance coverage.
- The right to be informed of the availability of the State Home Health Agency hot line.
- The right to be informed of these rights, in writing, before care begins.

Roles and Responsibilities of an Elder Companion Handout D

- The roles and responsibilities of a companion include:
- Providing care and help the client determines is needed.
- Carrying out tasks to maintain a good quality of home life, such as routine home management, food shopping and preparation, and ongoing companionship.
- Maintaining the self-respect and dignity of the client being helped, encouraging the client to make his/her own decisions, and keeping personal matters confidential.
- Being alert to any physical, mental, and/or emotional changes in the client.
- Sharing observations of any such changes with appropriate persons (e.g., client's family members, or other person in charge).

There is a wide range of situations in which the companion is likely to be involved. Each will involve different mixes of tasks and skills.

Personal Appearance Guidelines Handout E

- Take a bath or shower every day.
- Use an unscented deodorant.
- Give attention to oral hygiene (brush teeth) every day.
- Keep hair clean and in a manageable style.
- Wear clean, washable clothes every day. Do not wear short, tight clothing.
- Wear comfortable low-heeled shoes with non-skid soles and heels. Rubber soles are best.
- Limit jewelry—a watch and/or wedding band are always acceptable.
- Keep nails short and clean. Avoid fingernail polish.
- Wear conservative make-up.
- Keep in good health by eating a balanced diet and getting adequate sleep.

Personal Qualities of Elder Companions Handout F

Ethical

- Trustworthy
- Honest
- Believes work is important
- Dependable, accurate in work performed
- Efficient

Sensitive

- Respects feelings of others
- Polite
- Shows empathy and patience
- Kind
- Listens

Exhibits Personal Control

- Keeps temper under control
- Keeps personal life out of work situations

Learner

- Wants to improve skills
- Likes learning new things

Cooperative

- Enjoys working with people
- Gets along well with people
- Cheerful and pleasant

General Guidelines for an Elder Companion Handout G

- Be accurate.
- Carefully follow the instructions of your supervisor/family member in charge.
- If you do not understand instructions, ask your supervisor/family member in charge to explain.
- Report accidents or errors immediately to your supervisor/family member in charge.
- Keep information about your client to yourself, unless it is something that will affect the client's health. Follow the policies set forth in the home care organization's "Notice of Privacy Practices."
- Avoid wasting supplies and equipment.
- Give the client your full attention.
- Organize your time so you can get the job done in a timely manner.
- Report all complaints, no matter how small, to your supervisor/family member in charge.
- Perform all your duties in the spirit of cooperation.

Ethics Handout H

Ethics is a code of rules to govern behavior. A companion must be a person of high integrity. As an ethical companion, you must:

- Do your job correctly and to the best of your ability.
- Be honest with your clients and their families.
- Respect the rights of clients and their families.
- Refrain from talking about your own problems with clients.
- Keep all information about your client private. This is called "confidentiality."
- Never drink alcohol, use illegal drugs or smoke cigarettes when working.
- Always respect the cultural and religious practices of the client and family.

- Always show respect for the privacy and modesty of the client. The client must always be protected from embarrassment.
- Never accept tips or gifts from the client.

General Do's and Don'ts for the Elder Companion Handout I

DO:

- interact with the elder through conversation
- household cleaning and maintenance as agreed
- prepare food and grocery shop as instructed
- promote leisure activities such as reading and playing games
- be attentive to changes in the elder
- encourage physical activities as able
- offer an arm to steady the elder
- call 911 in an emergency

DO NOT:

- administer medication
- put food in the person's mouth
- bathe the person
- dress the person
- lift the person from bed to wheelchair
- change bandages

Do's and Don'ts for Specific Situations Handout J

Personal Care

- You can help a person put on or take off a sweater.
- You can help a person wash their hands.
- You cannot help a person take a bath.

Meal Time

- You can put food on the table.
- You can help the person pick up/hold a utensil.
- You cannot transfer the food from the plate to the client's mouth.

Giving Medications

- You can remind when medicine is to be taken.
- You can put the medicine on the tray or table.
- You can take the cap off.
- You cannot count out the medicine or hold it for the person.

Emergency Addresses and Phone Numbers Handout K

Police, Fire, Ambulance: Dial 911

Elder Helpline: 1-800-963-5337

My name and location is:

Name:

Address:

City:

State:

Zip:

Day Telephone:

Night Telephone:

Person(s) to notify in case of an emergency:

Name:

Address:

City:

State:

Zip:

Day Telephone:

Night Telephone:

Person(s) to notify in case of an emergency:

Name:

Address:

City:

State:

Zip:

Day Telephone:

Night Telephone:

Family Physician:

Name:

Address:

City:

State:

Zip:

Day Telephone:

Night Telephone:

