
INTERVIEWING A CAREGIVER

Caregivers are responsible for the care and well-being of others. When interviewing, look for someone who demonstrates empathy, patience and kindness — as well as those who have experience caring for people who are vulnerable and need help navigating the activities of daily living.

_____		_____	
Full name (first, middle, last)		Date interviewed	
_____		_____	
Address		Phone no.	
_____		_____	
City	State	Zip code	

Email address			
_____		Can we contact your last employer?	Yes
Name of previous employer			No
_____		_____	
Previous employer's phone no.		Previous employer's email address	

Background

How long have you been doing this type of work, and how many people have you cared for?

Tell me about your past work experience. Where was your last job? How long were you there? Why did you leave?

Release from liability: Any selections the individual or family makes in terms of care are the sole responsibility of the decision maker. The Financial Advisor, Legg Mason, and The Center for Innovative Care in Aging at the Johns Hopkins University School of Nursing are held harmless and released from any liability that may occur from selecting a caregiver, care center, community or facility.

Background (Continued)

What type of people do you usually care for? What type of assistance have your clients typically needed?

Have you ever cared for someone with the following (list conditions related to you or your loved one's needs, such as memory problems, wheelchair-bound, etc.)?

What languages are you fluent in (aside from English)?

What is your educational background?

What is your training background?

What specific certifications do you have, if any?

Do you have any CPR or first-aid training?

If I paid for it, would you be willing to undergo additional training? (Note: If the caregiver works for an agency, you may need to go through the agency to get an answer for this question.)

Have you had to handle an emergency while caring for a client? Please describe what happened and what you did to handle the situation.

If the answer to this question prompts any hesitancy or concerns on your part, please refer to the "What if ..." scenarios at the end of this worksheet

Hours/Schedule

We are hoping to have someone at the home from _____ to _____ each day. Are you available to work those hours?

If there is an issue, can you work longer hours (when asked)?

Would you be willing to stay overnight if there is an emergency at work or a need for me to travel for business? How much advance notice would you need?

Hours/Schedule (Continued)

Do you have other responsibilities aside from this job, including care for your own family?

What are your expectations for vacation time, and are you willing to help find coverage for the days that you need to take off?

When would you be able to start work?

After a trial period of _____ [insert time period — typically 2–4 weeks], would you be willing to commit to a _____ [insert time period — typically 6–12 months] working engagement?

Transportation

How do you typically get to work?

How far do you live from here?

Do you have a driver’s license, car insurance and a clean driving record?

Do have access to a car or public transportation? (If you do not live near public transportation, determine if the caregiver needs to be dropped off or picked up.)

Would you be comfortable driving one of our cars if need be, or using your own car to run errands, if we request that?

Core job responsibilities

Attached is a list of job responsibilities. Can you handle the duties required for this position?

Do you have any physical or medical conditions that may prevent you from performing these duties?

Do you have experience cooking for others? What type of food do you cook? Would you be able to accommodate dietary restrictions or allergies?

Attitude and trustworthiness

What attracted you to this profession?

How would you describe yourself?

How would your friends or family members describe you?

Are you willing to sign an agreement that you will not have guests come into our home unless I have given prior approval?

Other

Do I have your permission to run a background check? (Would be applicable if an agency did not provide a background check, or you are doing your own sourcing.)

Do you smoke? (Regardless of the answer, you should indicate that any smoking must be done outside in a designated area.)



What if ...

Sample scenarios to use, as needed. These are meant to determine how a caregiver would handle certain situations and provide insight into the caregiver's decision-making process. You would begin each scenario with the statement, "What would you do if ..."

- 1 My mother falls, seems confused, doesn't recognize you and won't let you help her.
- 2 My father is running a fever and is acting lethargic.
- 3 My grandmother falls to the floor clutching her chest.
- 4 You have just returned from picking up a prescription for my father. The pill is a different color (and different strength) than his usual medication.
- 5 My aunt is sleeping when a knock comes to the door. The woman says she's a friend of my aunt's, but you don't recognize her face or her name.

Sources referenced:

Care.com: <http://www.care.com/senior-care-senior-caregiver-interview-tips-p1145-q7744646.html>

AssistGuide Information Services: <http://www.agis.com/Document/38/professional-caregiver-interview-form.aspx>

All investments involve risk, including loss of principal.

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Maryland Financial Group, a registered investment advisor. Maryland Financial Group and IntegriGen Wealth Management are separate entities from LPL Financial. IntegriGen Wealth Management and LPL Financial are not affiliated with Legg Mason, Inc.

Legg Mason, Inc., its affiliates, and its employees are not in the business of providing tax or legal advice to taxpayers. These materials and any tax-related statements are not intended or written to be used, and cannot be used or relied upon, by any such taxpayer for the purpose of avoiding tax penalties or complying with any applicable tax laws or regulations. Tax-related statements, if any, may have been written in connection with the "promotion or marketing" of the transaction(s) or matter(s) addressed by these materials, to the extent allowed by applicable law. Any such taxpayer should seek advice based on the taxpayer's particular circumstances from an independent tax advisor.

© 2016 Legg Mason Investor Services, LLC. Member FINRA, SIPC. Legg Mason Investor Services, LLC is a subsidiary of Legg Mason, Inc. 676620 TAPX325509-W5 12/16