

Whether you are hiring through an agency or paying a family member directly, write the terms down before the first shift. Most of what goes wrong later is something both sides assumed and neither said.

This is a worksheet for getting to terms, not a contract. If money is changing hands, particularly with a family member, have someone qualified review the arrangement for tax and employment implications before it starts.

TALK TO AN ATTORNEY ABOUT THIS

Paying a family member for care creates a legal relationship, not just an arrangement. Depending on how it is structured it can create employer obligations, payroll and tax reporting duties, and, if Medicaid is ever applied for, a transfer that looks like a gift unless a written personal care agreement exists first. Have an elder law attorney draft or review the agreement before the first payment. This worksheet gets you to the terms. It is not the agreement.

Term	What we agreed
Who is providing care	
Days and hours	
Rate, and how overtime works	
How and when payment happens	
What the job includes	
What the job does not include	
Notice required to cancel a shift	
What happens if they cannot come	
Who they call in an emergency	
What gets written down after each shift	
How we raise a problem	
When we revisit these terms	