



Developed by home52, a subsidiary of Council on Aging

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Glossary

home52: A wholly owned, nonprofit subsidiary of Council on Aging. home52 programs and services align with Council on Aging’s mission to help individuals remain independent in their homes and communities.

Consumer Directed Care: Consumer Directed Care (CDC) is an option in the Elderly Services Program (ESP) that allows an ESP client (or their authorized representative) to become an “employer” and hire their own “employees” to provide in-home care. It is an alternative to using a traditional home care agency.

AddnAide: An app developed by home52 and powered by Council on Aging for finding and hiring in-home help. AddnAide is only available to clients enrolled in the Elderly Services Program (ESP) and is a Consumer Directed Care (CDC) tool.

Care Manager: Each Elderly Services Program (ESP) client is assigned a care manager who meets with them on a regular basis to determine their care needs. Care Managers authorize the ESP services each client receives, including the amount of care that can be provided (hours per month).

Employer or Employer of Record: The person legally employing the aide. This may be the person receiving care (ESP client) OR someone authorized to do so on their behalf. ESP clients who wish to designate an Employer of Record will complete an authorization form during their enrollment into the Consumer Directed Care Program.

Client: The person receiving care (ESP client).

Observer: The person a client designates to view appointments, timesheets, care team information and potential aide matches in AddnAide. Note: An Observer cannot make any decisions or changes on behalf of a client but can provide feedback to ESP clients or their Employer of Record regarding potential aide matches, care schedules, etc.

Aide: The person employed by a client to provide care. It’s important to understand that many people who register as an aide in the AddnAide app might not consider themselves to be a home health aide. They may view themselves as a caregiver or home helper. There are many terms that could be used to describe the person you hire to help meet your care needs. For the purposes of AddnAide and this manual, we will use the term Aide.

Palco, Inc.: The financial management services provider that will manage all financial and payroll responsibilities that go along with being an employer. On the client’s behalf and through AddnAide, Palco will manage all payroll, taxes and IRS reporting associated with the services an aide provides.



**DO YOU NEED EXTRA HELP WITH ADDNAIDE EMAILS OR ACCOUNT SET UP?
WE'VE GOT YOU COVERED!**

- Contact AddnAide customer support at support.addnaide@home52.org or 1-855-460-7268.
- Click the blue question mark icon on the Register page (and throughout AddnAide) to submit a help request (a response may take up to 24 hours).
- Check out this technology resource from Senior Planet developed by AARP: <https://seniorplanet.org/category/technology>.

SECTION



Accept Your Invitation to AddnAide

SECTION 1

Accept Your Invitation to AddnAide

Welcome to AddnAide!

As a client enrolled in the Elderly Services Program (ESP), you have the option to find and hire your own in-home help through ESP's Consumer Directed Care (CDC) service. To make it easier for clients to find in-home help, Council on Aging and its subsidiary, home52, created AddnAide.

AddnAide is an online tool for finding and hiring in-home help (an aide) using a computer or mobile device. In Consumer Directed Care and in AddnAide, you (or someone you designate) act as the employer for your aide. Your aide is not an employee of Council on Aging, home52, the Elderly Services Program, or AddnAide. Any aide you hire through AddnAide is your employee. Council on Aging has partnered with a financial management services provider, Palco, Inc., to manage all financial and payroll responsibilities that go along with being an employer. On your behalf and through AddnAide, Palco will manage all payroll, taxes and IRS reporting associated with the services your aide provides. More on this later!

This guide will help you learn how to use AddnAide to find and hire the in-home help you need.

Your ESP care manager has partially filled out your AddnAide profile with some of your personal information, your care plan and how many hours of care you are eligible to receive each month. **It's now up to you to finish your profile and find a match!**

There are a few important steps you must take right away:

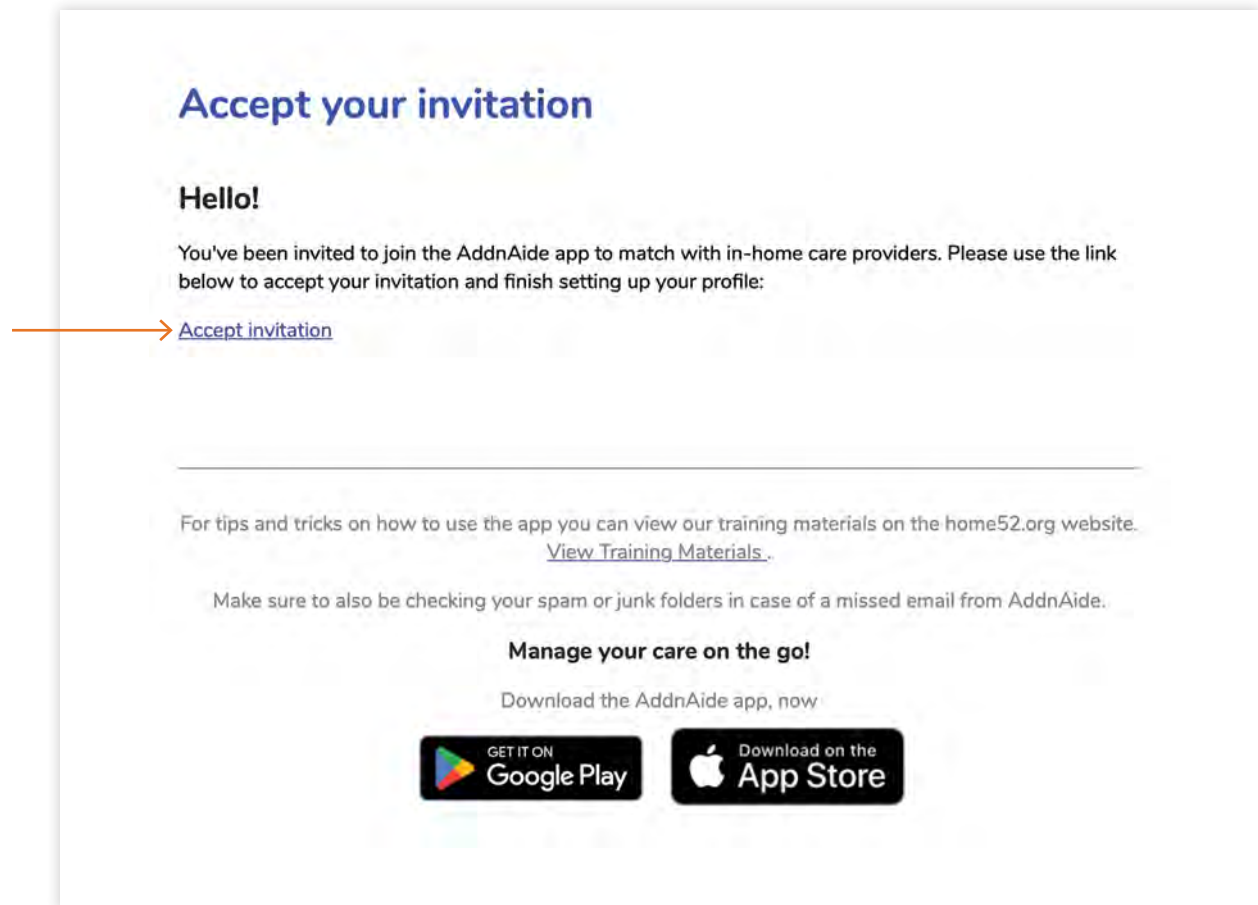
1. Gather the information you need to complete your profile, including:
 - a. A pen for writing down your password and taking notes.
 - b. The days and times each week you'd prefer to receive care.
 - c. The name and email of the person you permit to review your aide matches and conversations (an Observer). This is optional.

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NOTES

2. Check your email for a message from donotreply@addnaide.home52.org titled **Set up your AddnAide Account**. If it doesn't appear in your inbox, check your spam or junk mail folder.

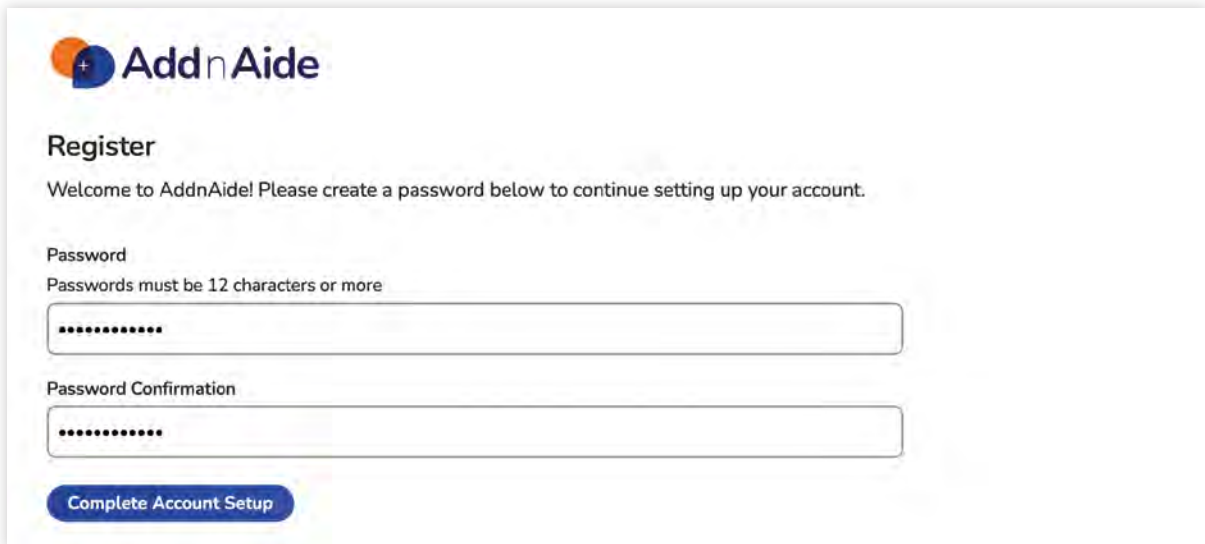
Accept your invitation by clicking "Accept Invitation." You will now be taken to the login screen to finish your registration.



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NOTES

3. Create a password for your AddnAide account that is 12 characters or more. Write your password down and keep it in a safe place. You could even write it in the Notes section at the bottom of this page. If you have an Employer of Record, share your password with them so they can help access your account.



4. Click “Complete Account Setup” to continue.



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NOTES

SECTION



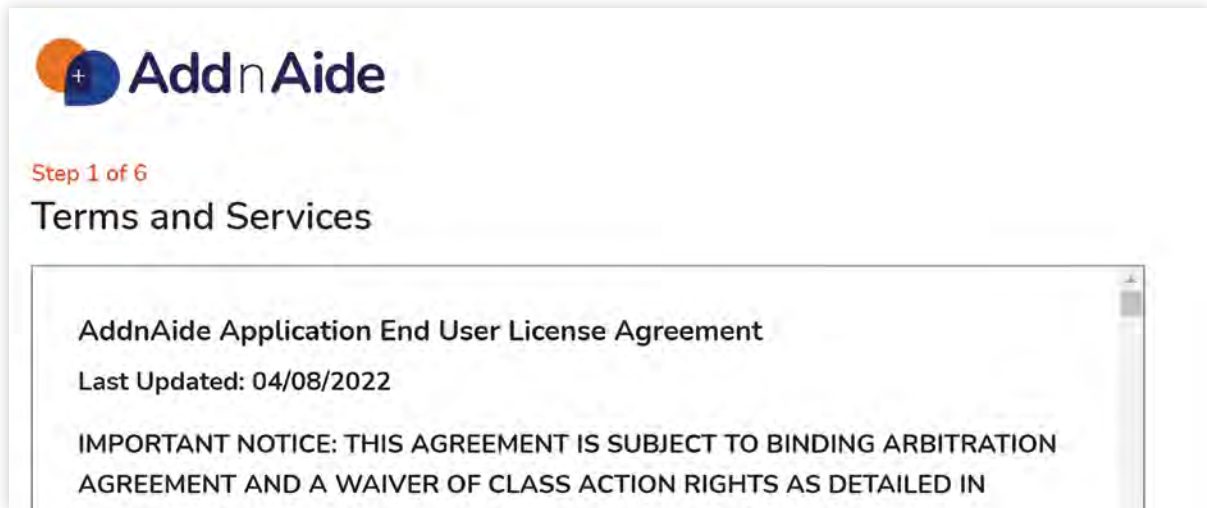
Set Up and Activate Your Profile

SECTION 2

Set Up and Activate Your Profile

Setting up your account may take 15–30 minutes. To complete your AddnAide account set up:

1. Read the AddnAide End User License Agreement.



AddnAide

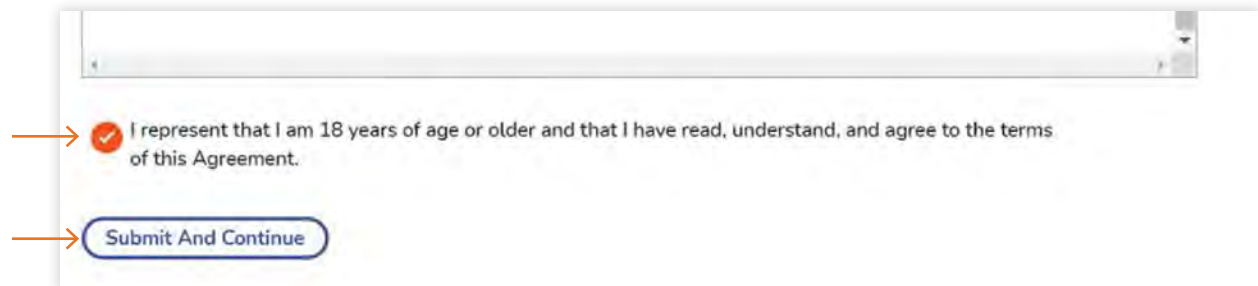
Step 1 of 6

Terms and Services

AddnAide Application End User License Agreement
 Last Updated: 04/08/2022

IMPORTANT NOTICE: THIS AGREEMENT IS SUBJECT TO BINDING ARBITRATION AGREEMENT AND A WAIVER OF CLASS ACTION RIGHTS AS DETAILED IN

If you understand and agree to the terms and services, and are 18 years of age or older, click the circle next to “I represent that I am 18 years of age or older and that I have read, understand, and agree to the terms of this Agreement.”



☒ I represent that I am 18 years of age or older and that I have read, understand, and agree to the terms of this Agreement.

Submit And Continue

When finished, click “Submit and Continue.”

NOTES

2. Confirm the employer information entered on your behalf by your ESP care manager. Please carefully review this information, making corrections and filling in the blanks as you go.

Note: The employer is the person who will legally employ the aide(s). This is either you or someone you designate on your behalf, known as an Employer of Record. If you are the employer, then your personal information should appear in this section. If you've designated someone else as your Employer of Record, then their information should appear in this section.

This information will be shared with Palco, the financial management services provider that processes payment to your aide. Council on Aging has partnered with Palco to manage all financial and payroll responsibilities that go along with being an employer. On your behalf and through AddnAide, Palco will manage all payroll, taxes and IRS reporting associated with the services your aide provides.



Step 2 of 6

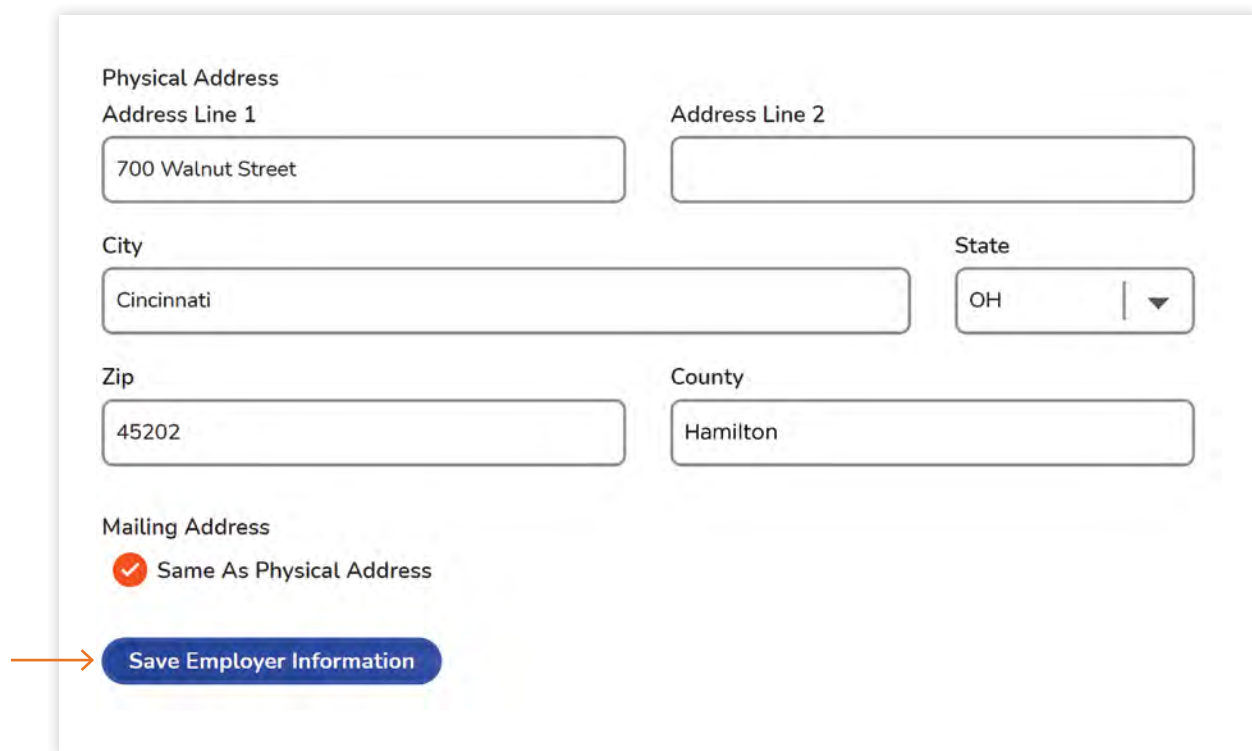
Confirm Employer Information

The employer is the person legally employing the aide(s). Sometimes, the employer is the person receiving care (the client). In other instances, the employer is someone designated by the client to hire and manage an aide(s) on their behalf. This individual is known as the Employer of Record. Please verify the below information is correct.

Who Is The Employer?

How Would The Employer Prefer To Be Contacted If The Financial Management Service Needs To Reach Them?

NOTES



The screenshot shows a form titled "Physical Address" with the following fields:

- Address Line 1:** 700 Walnut Street
- Address Line 2:** (empty)
- City:** Cincinnati
- State:** OH (dropdown menu)
- Zip:** 45202
- County:** Hamilton

Below the physical address fields is the **Mailing Address** section, which includes a radio button labeled "Same As Physical Address" that is currently selected. At the bottom of the form is a blue button labeled "Save Employer Information", which is pointed to by an orange arrow from the left.


Note: The physical address is where you live. The mailing address is where you prefer to receive mail. In most cases, these will be the same address. If this is the case for you, select "Same As Physical Address."

Click "Save Employer Information" when complete.

3. Confirm the client information entered on your behalf by your ESP care manager. If you are the employer and receiving care, your information also will appear in the Client Information section. If you are the employer and setting up care for someone else, then their information should appear in this section.

Review the information, correcting and filling in blanks as you go.

NOTES




Step 3 of 6

Confirm Client Information

Client Information

First Name	Middle Name	Last Name
<input type="text" value="Sue"/>	<input type="text"/>	<input type="text" value="Miller"/>

SSN	Birth Date	Gender
<input type="text" value="xxx-xx-xxxx"/>	<input type="text" value="05/20/1955"/> 	<input type="text" value="Female"/> ▼

Physical Address


Address Line 1	Address Line 2
<input type="text" value="700 Walnut Street"/>	<input type="text"/>

City	State
<input type="text" value="Cincinnati"/>	<input type="text" value="OH"/> ▼

Zip	County
<input type="text" value="45202"/>	<input type="text" value="Hamilton"/> ▼

Mailing Address

☒ Same As Physical Address

 [Save Client Information](#)

Confirm the mailing address. Click “Save Client Information” when complete.

NOTES

4. Set up your care preferences to let potential aides know your preference for days and times for services as well as how to communicate with you.

To set scheduling preferences, click on as many days you prefer. Once clicked, the circle will turn orange. To de-select, click the circle again.








Step 4 of 6

Set Up Preferences




Availability

What is your general availability for appointments? You have full control of your schedule and will be able to review each proposed appointment as it is scheduled. This information just gives others an idea of when you'd prefer to schedule appointments.

Available Days

 **Sun**  **Mon**  **Tue**  **Wed**  **Thu**  **Fri**  **Sat**

Start Time **End Time**

 06:37 AM  --:-- -- 

06	37	AM
07	38	PM
08	39	
09	40	
10	41	
11	42	
12	43	

Communication Preference

g with your aide , which do you prefer?

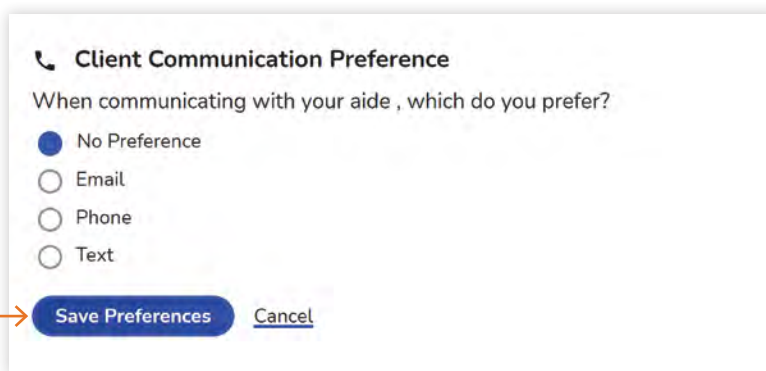
NOTES

Note: Your availability is used for matching purposes only. You will need to finalize a weekly schedule with the aide you hire.

To fill in the start and end times, either click on the dashes or click on the clock icon on the right-hand side of each box. From here, a pull-down will appear and you can click the hour, minute and AM or PM.

Tip: To see more time options, click on a blue box (you will see a black border appear) and use the up/down keys on your keyboard to move the box forward or backward.

To set up communication preferences, click on how you wish to communicate with your aide.



Client Communication Preference

When communicating with your aide, which do you prefer?

☒ No Preference

☐ Email

☐ Phone

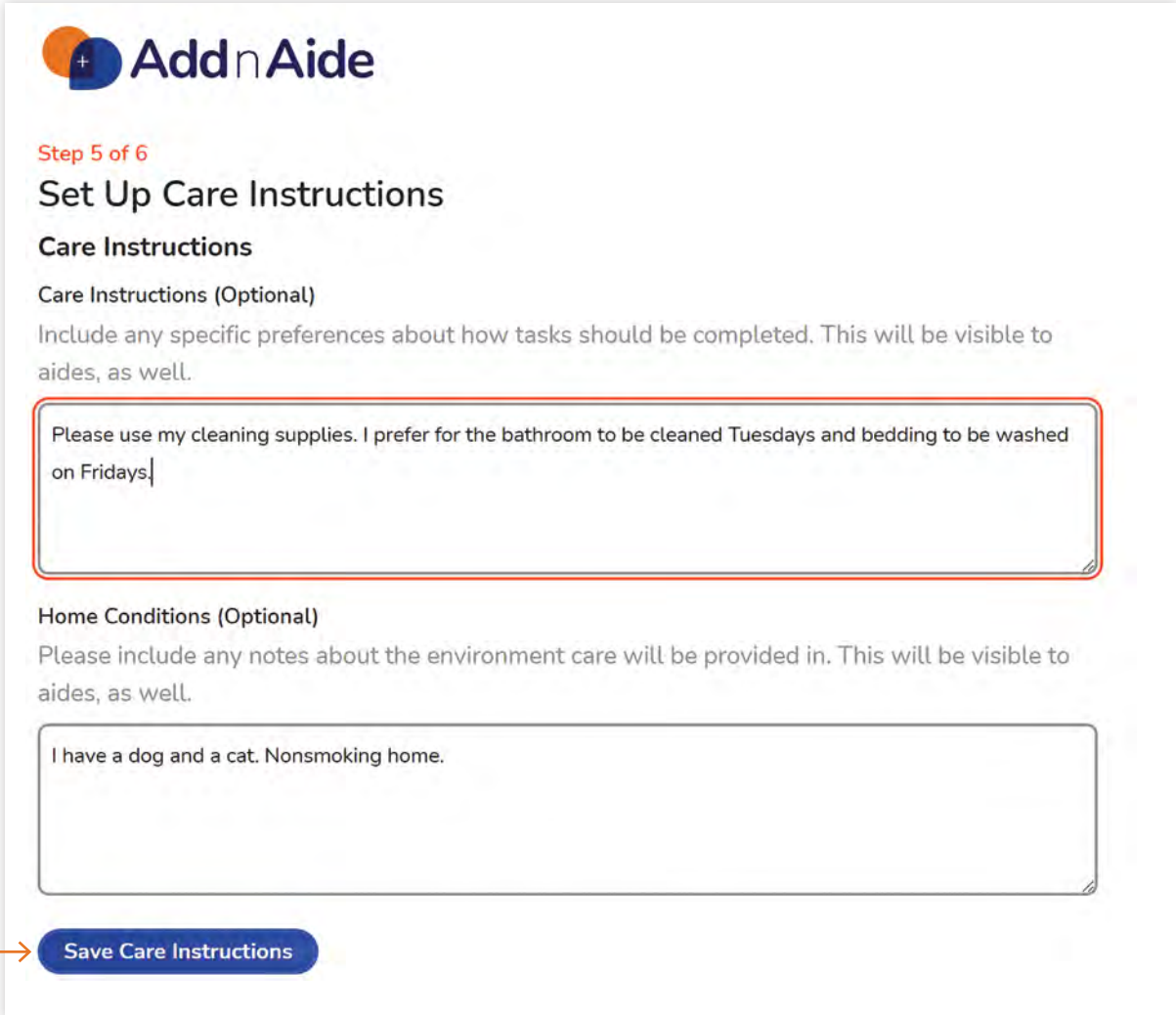
☐ Text

Save Preferences [Cancel](#)

Once you have completed your schedule and communication preferences, click “Save Preferences.”

NOTES

5. Complete Step 5 if you have specific care instructions or home conditions that must be considered when matching with a potential aide. Click on the box and begin typing.



AddnAide

Step 5 of 6

Set Up Care Instructions

Care Instructions

Care Instructions (Optional)

Include any specific preferences about how tasks should be completed. This will be visible to aides, as well.

Please use my cleaning supplies. I prefer for the bathroom to be cleaned Tuesdays and bedding to be washed on Fridays.

Home Conditions (Optional)

Please include any notes about the environment care will be provided in. This will be visible to aides, as well.

I have a dog and a cat. Nonsmoking home.

Save Care Instructions

When finished, click “Save Care Instructions.”

NOTES

6. Set up a personal bio to help a potential aide know more about you or the person receiving care. You may share interests, hobbies and other details. Click on the box and begin typing.

Step 6 of 6

Set Up Personal Bio

Personal Bio


This is an opportunity to share a little more about whomever will be receiving care. If that is you, tell us a little more about yourself! If that is someone else, share some things about them. This will give aides a better idea of who they will be working with.

I am an 85 year old who struggles with Arthritis which makes it difficult for me to do things like run the vacuum, do the laundry and prepare meals. I am an early riser and would prefer assistance in the morning if possible.

You also may upload a photo of yourself (or the person receiving care). To do so, click “Choose Photo.” Your computer’s image files will appear. Select a photo and click open. Your photo will fill the image box.

Account Photo

The account photo should be a picture of whomever will be receiving care. If that is you, upload a picture of yourself! If that is someone else, upload a picture of them.



[Choose Photo](#)

[Save Personal Bio](#)

NOTES

Click “Save Personal Bio” and your AddnAide profile is complete! You will be immediately directed to your dashboard where you can begin the matching process. You also can access your dashboard at any time at <https://addnaide.home52.org>.



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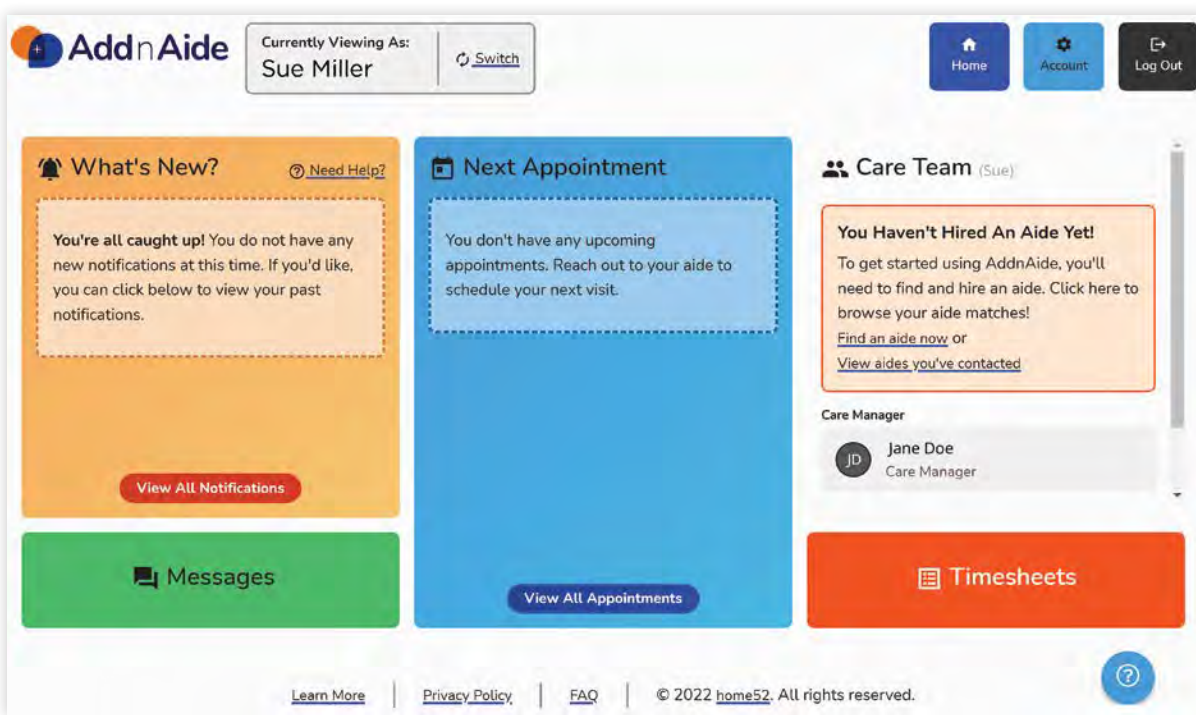
Review Your Dashboard

SECTION 3

Review Your Dashboard

1. If you aren't already in your dashboard, access it by going to <https://addnaide.home52.org> and entering the email and password associated with your account.

Tip: You may wish to bookmark or add this website to your favorites on your computer for ease of access (while on the AddnAide site, click the star icon in the top search bar next to the website address).



NOTES

2. Explore your dashboard to understand how each section will help you manage care. Here's a quick explanation:

What's New: The What's New section alerts you to tasks you need to take care of or updates to your account.

Messages: Need to send a message to your aide(s), caregiver or care manager? The Messages section is where you communicate within AddnAide.

Next Appointment: All upcoming appointments with your aide will appear in the Next Appointment section of the dashboard. You also can view all past appointments by clicking on "View All Appointments" at the bottom of this section.

Care Team: All members of your care team appear here. If you need to find a new aide, this is where you start.

Timesheets: To review timesheets for your aide(s), click on the orange "Timesheets" button in the bottom right of your dashboard. Here, you'll see timesheets for each 2-week pay period that include all approved time entries for your aide(s) in the given time period.

Account: The information that you and your ESP care manager provided when setting up your profile and preferences is saved here. Step 3 shows how to update this information. Note: Only your care manager can update your care plan.

Blue Question Mark Icon: If you have any questions while navigating AddnAide, click the blue question mark icon at the bottom of your screen to reach customer support.

NOTES

3. Click “Account” and give your profile and preferences one final review. Click on each category along the left-hand side of the screen to see the information you submitted. To update:

Currently Viewing As: Sue Miller [Switch](#)

[Home](#) [Account](#) [Log Out](#)

My Account
[Home](#) / [My Account](#)

[Client Information](#) [Employer Information](#) [Care Plan](#) [Care Team](#)

Client Information [Edit](#)

First Name	Sue
Middle Name	—
Last Name	Miller

- a. Click “Edit” and a window will appear with the information you provided when creating your profile.
- b. Click the box that needs updating and type your new information.

Currently Viewing As: Sue Miller [Switch](#)

[Home](#) [Account](#) [Log Out](#)

My Account
[Home](#) / [My Account](#)

[Client Information](#) [Employer Information](#) [Care Plan](#) [Care Team](#) [Care Instructions](#) [Preferences](#)

Client Information

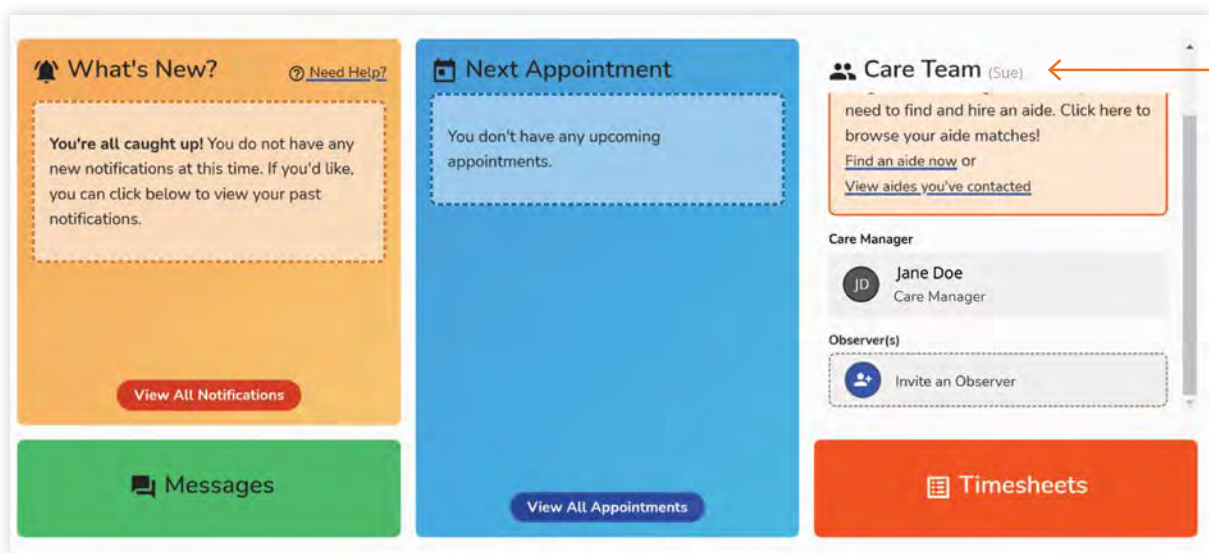
Client Information

First Name	Middle Name	Last Name
<input type="text" value="Sue"/>	<input type="text"/>	<input type="text" value="Miller"/>
SSN	Birth Date	Gender
<input type="text" value="333-33-3333"/>	<input type="text" value="05/20/1955"/>	<input type="text" value="Female"/>

NOTES

- c. Click “Save Client Information” at the bottom of the page to save your changes.
 - d. Your updated information now appears in Account.
 - e. Click “Home” to return to your dashboard.
4. We recommend adding a trusted Observer to your account. An Observer can view your appointment schedule, timesheets, care team information and potential aide matches. You will need an email address for your Observer. Note: An Observer cannot make any decisions or changes on your behalf.

This option is in the Care Team column on the right side of your screen. To scroll down the column, slide the gray bar on the right or click the down arrow.



NOTES

Click “Invite an Observer” and fill out the form that appears. Click “Send Invite” when finished.

Invite An Observer

You can invite someone to connect to your account as an observer. If they accept your invitation to connect, they'll be able to view your appointment schedule, timesheets, care team information, and potential aide matches.

To invite someone to connect as an observer, fill out the form below and they will receive an email invitation.

Relationship
Select Relationship to Client

First Name
[Text Field]

Last Name
[Text Field]

Email
[Text Field]

Send Invite **Cancel**



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NOTES

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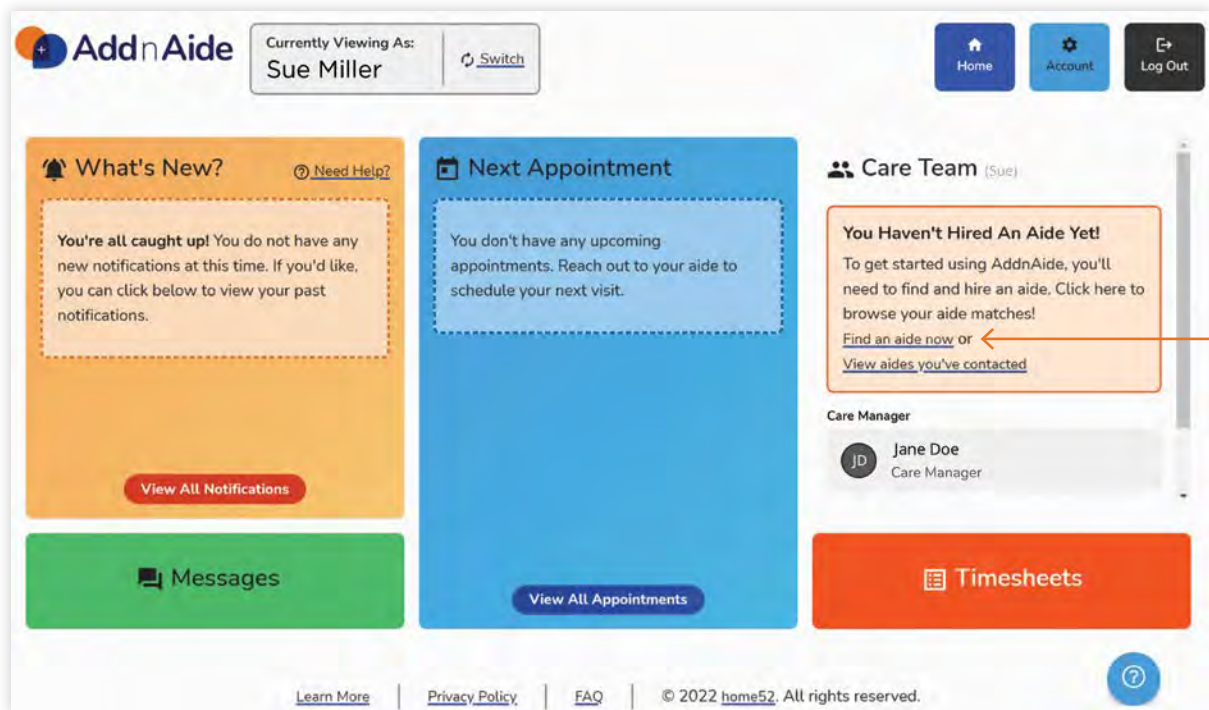
Match with an Aide

SECTION 4

Match with an Aide

Now that you've completed your profile and reviewed your dashboard, you're ready to match with an aide!

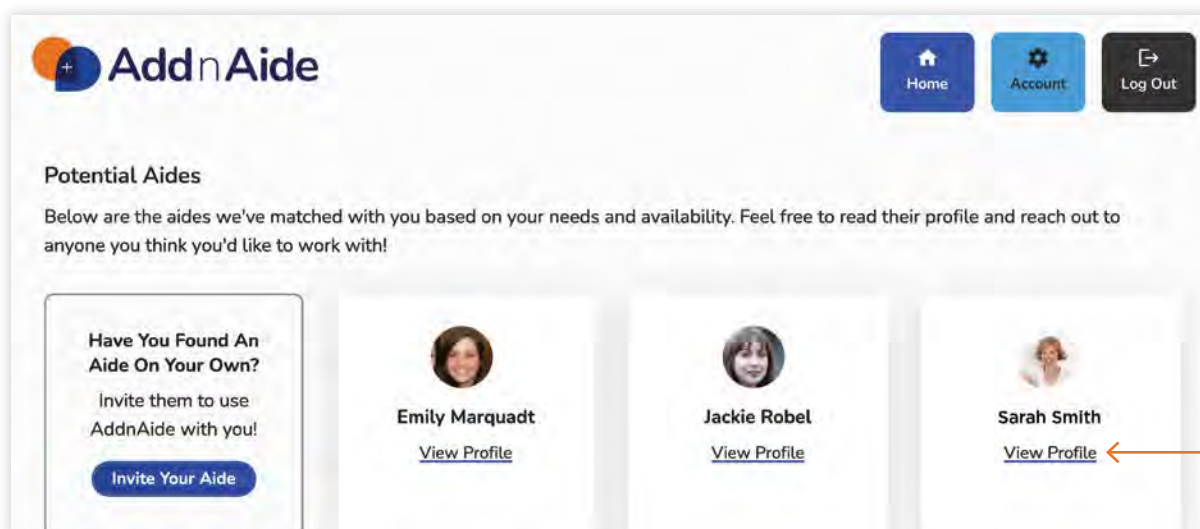
1. In the Care Team section of the dashboard, click "Find an aide now" in the orange box.



2. All aides who match with your schedule preference and care needs will appear.

Tip: If no or few matches appear, click "Account" and adjust the days and times you need care. It's best to provide a broad range of options.

NOTES



AddnAide

Home Account Log Out


Potential Aides

Below are the aides we've matched with you based on your needs and availability. Feel free to read their profile and reach out to anyone you think you'd like to work with!

Have You Found An Aide On Your Own?


Invite them to use AddnAide with you!

[Invite Your Aide](#)




Emily Marquadt

[View Profile](#)



Jackie Robel

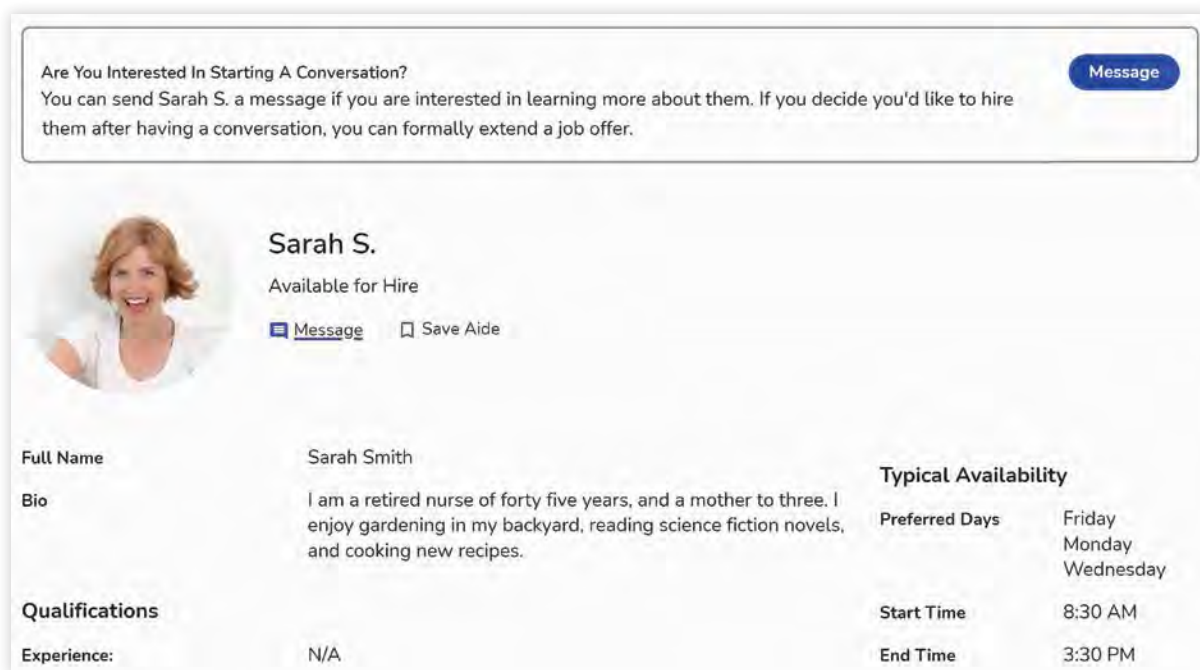
[View Profile](#)



Sarah Smith

[View Profile](#)


- Click each profile to learn more about the potential aides.



Are You Interested In Starting A Conversation?

You can send Sarah S. a message if you are interested in learning more about them. If you decide you'd like to hire them after having a conversation, you can formally extend a job offer.

[Message](#)



Sarah S.

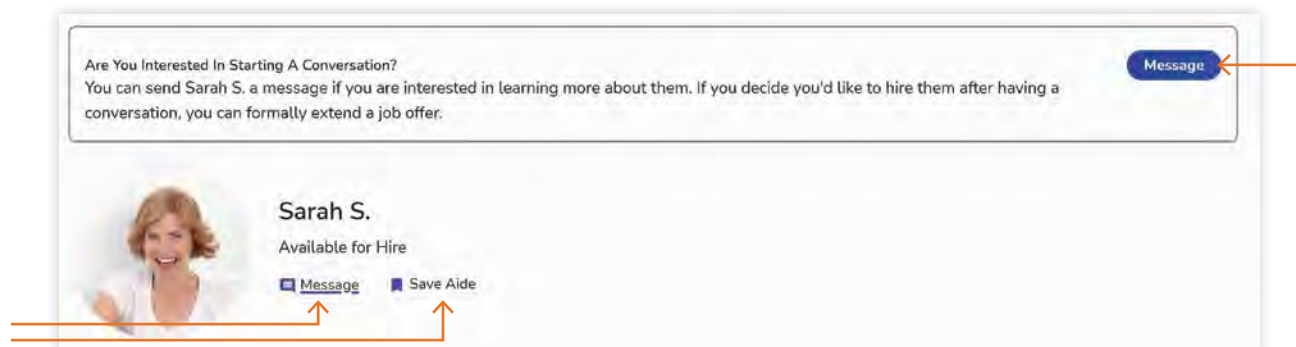
Available for Hire

[Message](#) [Save Aide](#)

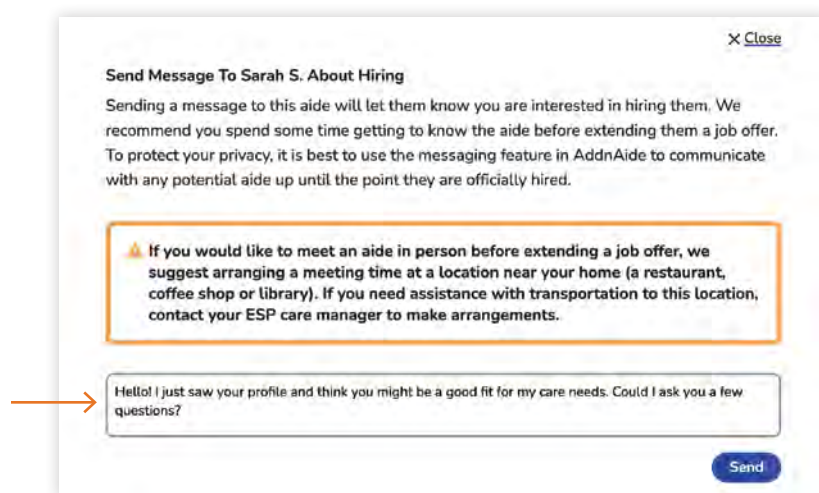
Full Name	Sarah Smith	Typical Availability	
Bio	I am a retired nurse of forty five years, and a mother to three. I enjoy gardening in my backyard, reading science fiction novels, and cooking new recipes.	Preferred Days	Friday Monday Wednesday
Qualifications		Start Time	8:30 AM
Experience:	N/A	End Time	3:30 PM

NOTES

- As you review profiles, flag those of interest by clicking “Save Aide.” This way, you’ll easily find their profiles if you wish to message them.



- To message an aide, either click the “Message” button in the Are You Interested In Starting A Conversation box or the Message link underneath their name. A pop-up box will appear.
- In the pop-up box, enter your message and click “Send.” **Please do not share personal information or extend a job offer at this time.** Your goal should be to start a conversation with the potential aide to see if they might be a good match. A sample message is included in the example below.



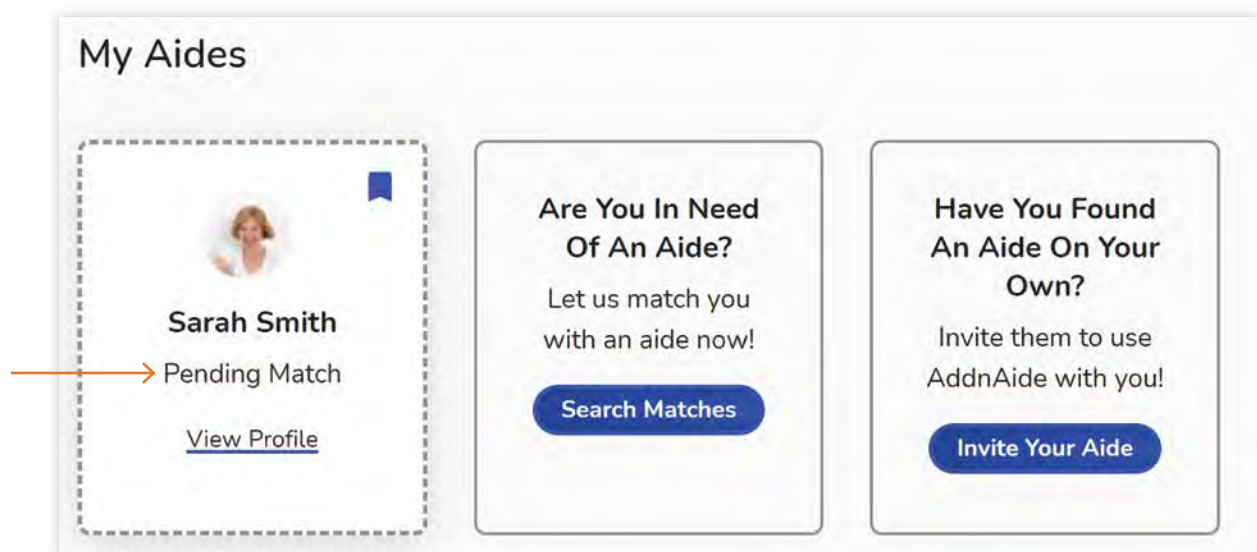
NOTES

Once you message a potential aide, they may view only a portion of your profile including your care needs, preferred schedule and any notes you've provided. They will not see your contact information or address. **To protect your privacy, it is best to use the messaging feature in AddnAide to communicate with any potential aide up until the point they are officially hired (all aides must complete required employment forms and pass a background check prior to working on your behalf).** An aide will have access to your full profile only after they accept your job offer.

If you would like to meet an aide in person before extending a job offer, we suggest arranging a meeting time at a public location near your home (a restaurant, coffee shop or library). If you need assistance with transportation to this location, contact your ESP care manager to make arrangements.

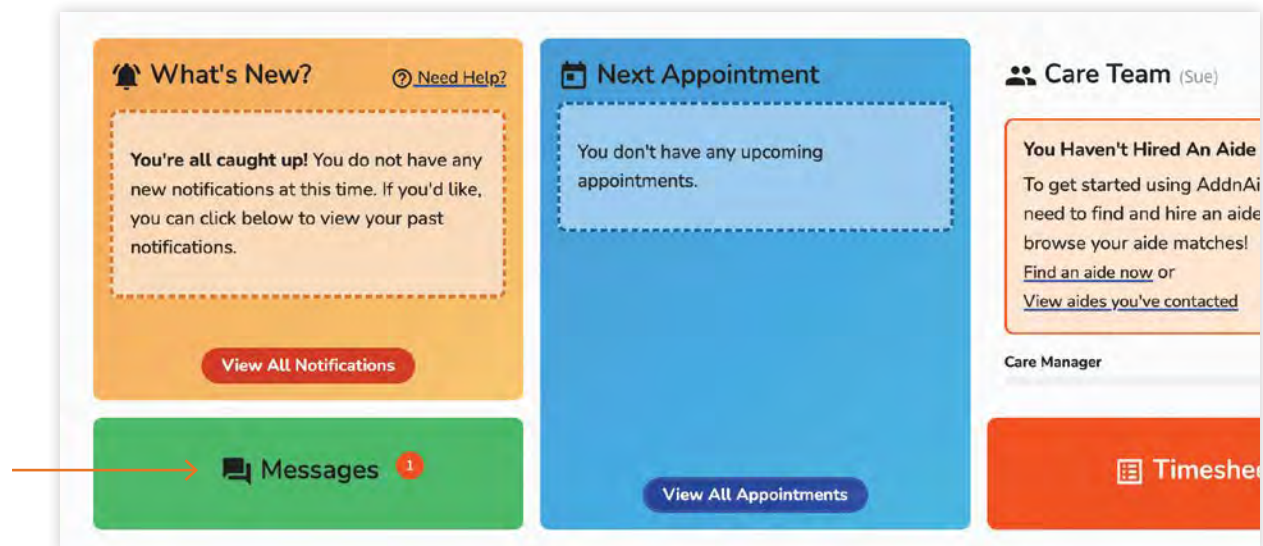
Tip: Message at least 3–5 potential aides at once to broaden your opportunities to match. Keep in mind these potential aides are being contacted by other AddnAide users as well!

7. Once you message an aide, you can find their profile by clicking “View aides you’ve contacted” in the Care Team section. This will take you to the My Aides page, where you will now see “Pending Match” below their name.

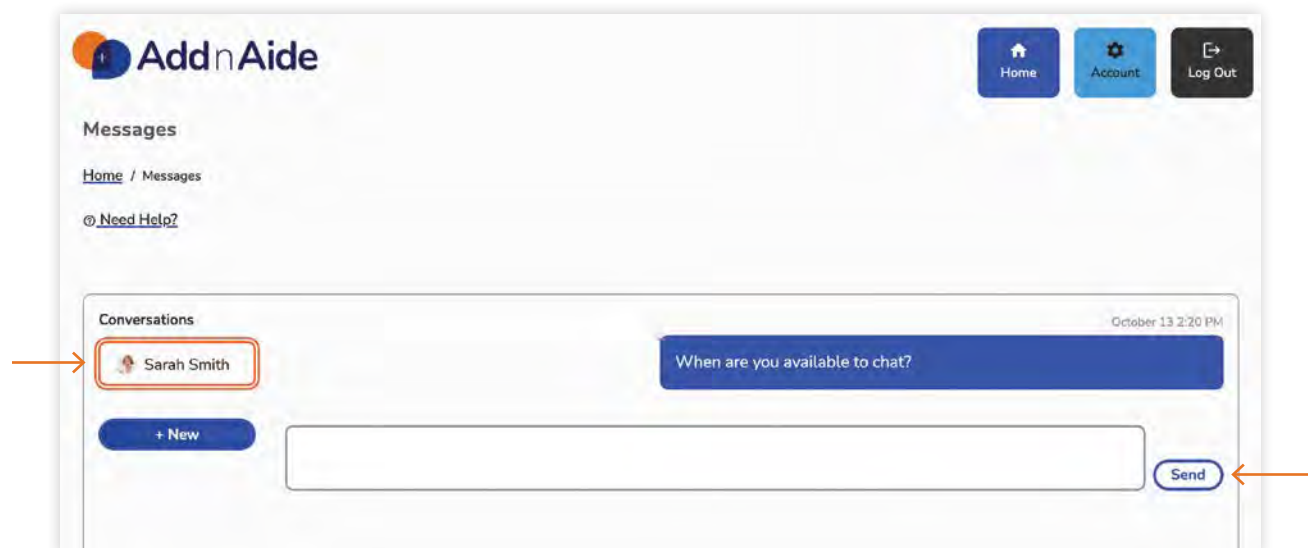


NOTES

8. Check your dashboard for a response. If you receive a message, a red alert will appear in the Messages section.



9. Click "Messages" to view all messages.



NOTES

10. In Messages, click the potential aide's name under Conversations to see their message and to reply. Click "Send" when finished. **Again, to protect your privacy, it is best to use the messaging feature in AddnAide to communicate with any potential aide up until the point they are officially hired.**



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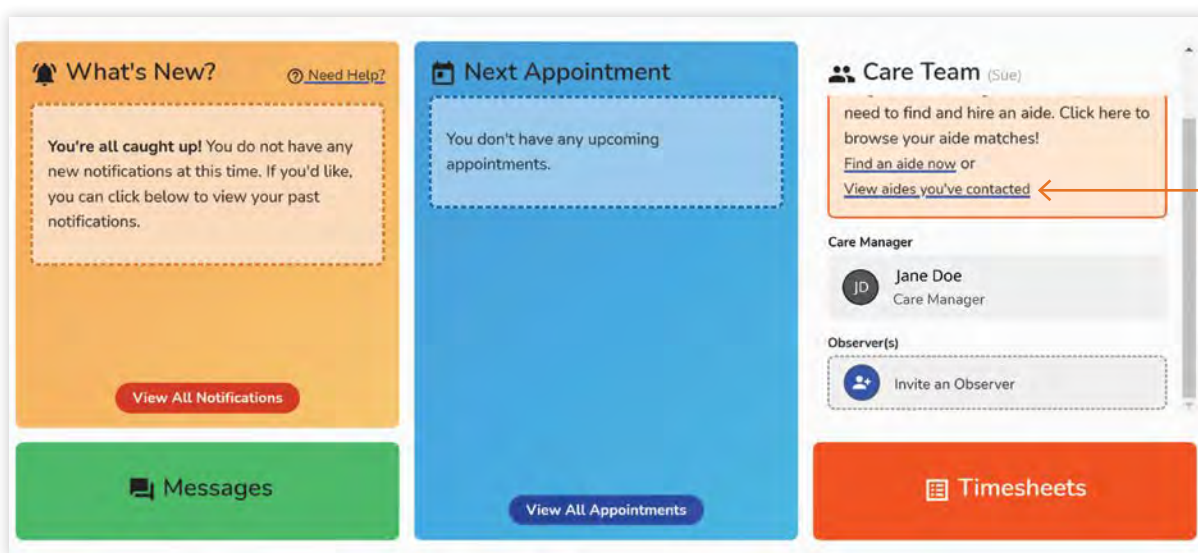
Offer a Job to an Aide

SECTION 5

Offer a Job to an Aide

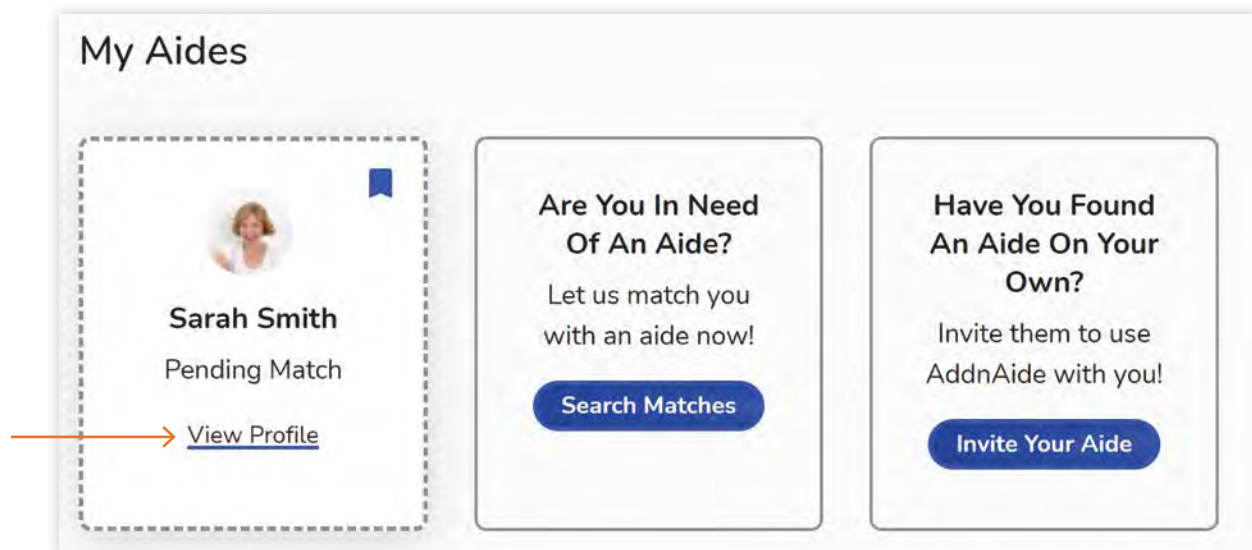
Once you've found a good match, it's time to extend an offer. **Remember, you must extend a job offer through the AddnAide app.** Your aide must accept this offer within AddnAide to begin the formal hiring process, which includes completing required employment forms and your aide passing a background check. If you do not complete this process within AddnAide, your aide will not be paid for any services they provide.

1. Go to the potential aide's profile by clicking "View aides you've contacted" in the Care Team section.

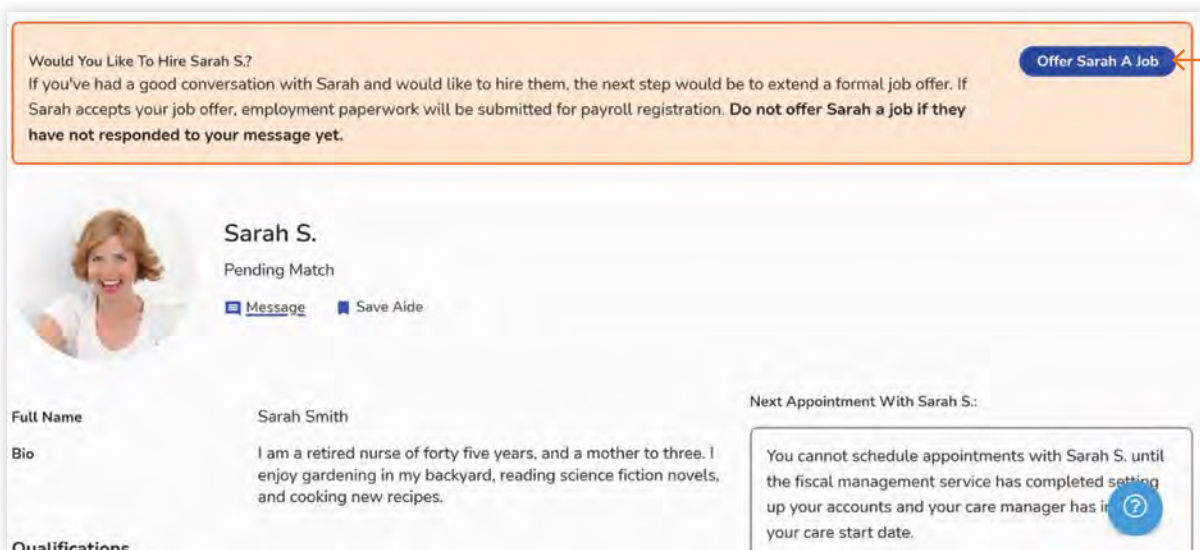


NOTES

- Find the aide you wish to hire and click “View Profile.”



- If you've already messaged the aide, you will see an orange box with an “Offer (NAME) A Job” button.

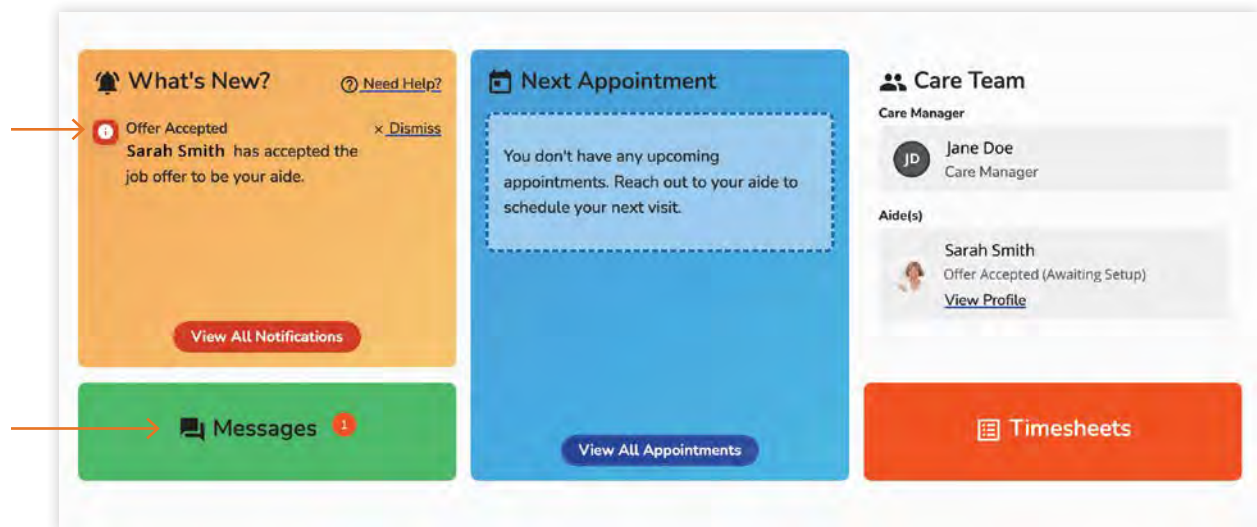


NOTES

- When you click the button, the potential aide will be notified of your job offer. The aide's profile will feature a message that a job offer has been sent and the "Offer (NAME) A Job" button will turn gray and read "Awaiting Offer Acceptance." You also will see "Job Offered (Awaiting Response)" under their name.



- Check the What's New section of your dashboard daily for updates regarding the status of your job offer. In addition, check the Messages section of your dashboard daily to see any messages the potential aide may have sent to you.



- Once your offer is accepted, your new aide will appear in the Care Team column of your dashboard. "Offer Accepted (Awaiting Setup)" will appear under their name until the required employment forms are complete. **You should continue to message your aide within AddnAide until they are officially hired.**

NOTES

7. In addition, you'll also receive a job offer confirmation email from donotreply@addnaide.home52.org. If you don't see it, remember to check your junk mail or spam folder.

From: donotreply@addnaide.home52.org <donotreply@addnaide.home52.org>
Sent: Friday, September 9, 2022 9:16 AM
Subject: Job Offer

Sarah Smith has been offered a job to be Sue Miller's aide.

For tips and tricks on how to use the app you can view our training materials on the home52.org website
[View Training Materials.](#)

Make sure to also be checking your spam or junk folders in case of a missed email from AddnAide.

Manage your care on the go!



**DO YOU NEED EXTRA HELP WITH ADDNAIDE EMAILS OR ACCOUNT SET UP?
WE'VE GOT YOU COVERED!**

- Contact AddnAide customer support at support.addnaide@home52.org or 1-855-460-7268.
- Click the blue question mark icon on the Register page (and throughout AddnAide) to submit a help request (a response may take up to 24 hours).
- Check out this technology resource from Senior Planet developed by AARP: <https://seniorplanet.org/category/technology>.

NOTES

SECTION



Complete the Hiring Process

SECTION 6

Complete the Hiring Process

Once an aide accepts your job offer, there are a few things you both must do before scheduling your first appointment.

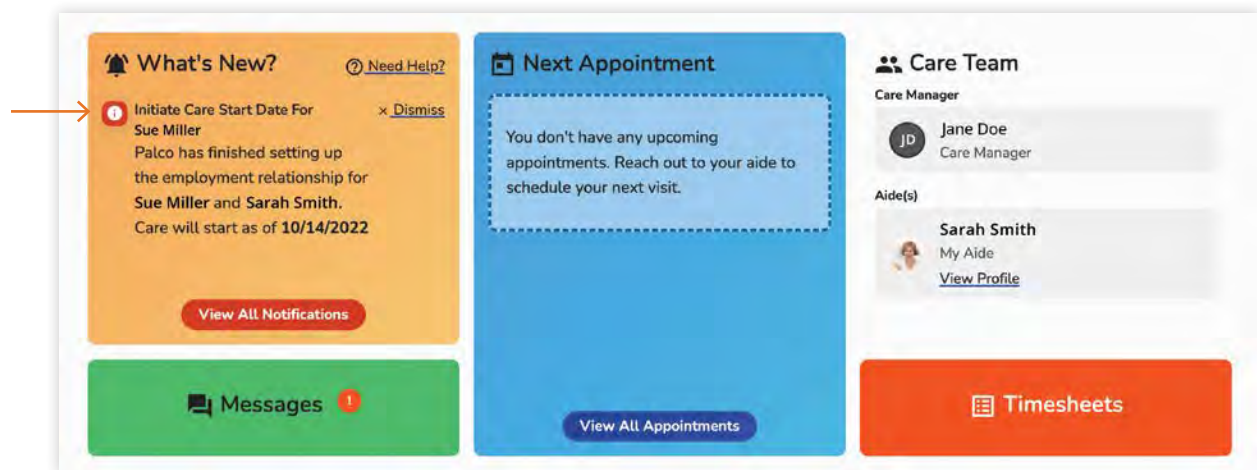
1. You and your aide will receive an email from Palco, our financial management services provider, **within three business days** that will include information about forms you must complete as an employer. These forms will be completed online in Palco's portal. The forms allow Palco to act on your behalf (as the employer) with the government. The forms will include:
 - **Designation of Surrogate Employer** to establish an Employer of Record on your behalf, if you will not be the employer.
 - **Employer Responsibilities and Attestation** outlines your responsibilities as the employer. This form should be completed by you or, if applicable, by your Employer of Record.
 - **Employer Authorization Agreement** outlines Palco's responsibilities as the financial/ employer-agent and authorizes Palco to ensure compliance with the IRS and other federal and state tax authorities on your behalf.
 - **OH-JFS 20106 Employer Authorization** gives Palco the authority to provide and receive information and to perform any and all acts that Palco can perform on your behalf as the employer with respect to any Ohio unemployment compensation matters.
 - **OH WT-8655 Withholding Tax Authorization** gives Palco the authority to provide and receive information and to perform any and all acts that Palco can perform on your behalf as the employer with respect to any Ohio tax withholding matters.
2. We're available to help you with these forms. **An enrollment specialist will contact you to ensure you've received the email from Palco and offer to help you complete the forms.**
3. A background check is required for all aides. Once you and your aide have completed the required forms, Palco will complete the database portion of the background check.

NOTES

This should take approximately **24 hours**. Your aide also must have fingerprints taken **within 60 days** before they can be paid for services they provide on your behalf.

Note: You have the option to grant conditional employment to an aide once they pass their background check if fingerprinting is not yet complete. In addition, you can waive the fingerprint requirement if the aide has had their fingerprints run by Palco in the past 365 days.

4. **Once your paperwork is submitted to Palco and your care manager has initiated a start date, you may schedule your first appointment with your new aide!**



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NOTES