CARERULEBOOK COLORADO MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Colorado manual builder asks: 35 decisions and 28 details, 63 questions in all, including the ones the builder only asks after certain answers. Use it to collect everything from the agency before you open the builder. You do not need to buy the manual first.

How to use it

1. Settle the decisions in Part 1 with the agency's owner or governing body first. They change what the manual says, not just the names in it.
2. Collect the details in Part 2. Questions marked "Only asked if" depend on an earlier answer; skip them when that answer does not apply.
3. Type the answers into the builder at https://www.carerulebook.com/us/colorado/home-care/manual. The builder asks the questions in the same order, step by step: each step asks its decisions first, then its details. The question numbers (Q1, Q2 and so on) are this questionnaire's own, to help you keep track.
4. Part 3 shows a completed example for a fictional agency and what those answers do to the manual.

Good to know

- Every question carries the same help text as the builder, including the rule references the builder gives.
- You can pay before every answer is in. Only the agency's name is needed, and the builder checks a few things first: Choose at least one service you will provide. Type phone numbers in full, with the area code. Type day counts as whole numbers. Any other required answer left blank prints as a gap in square brackets (for example [Office address in Colorado]) for you to fill in later, and the order page lists them. A question that says what prints if left blank is never a gap.
- After buying, you can change your answers and download again for 12 months, so a new manager or phone number does not mean buying again. One purchase covers one agency, so its name, address can only take small corrections, such as a typo.
- Whatever the manual says, the agency is expected to do. Choose what the agency will really do, not what sounds best.
- This questionnaire and the manual are not legal advice.

Names to have ready

The manual names these people, so agree who they are before you start:

- Governing body members, or the person designated to act as the governing body
- HCA manager
- Staff member who acts when the manager is absent
- Supervisor of homemakers and personal care workers
- Backup supervisor
- Person who trains workers and checks their competency

PART 1

Part 1. Decisions to settle first

These 35 questions change what the manual says. Each one shows the options the builder offers (the builder's default is marked), when it is asked, and which policies it changes. Tick one option for each. The question numbers follow the builder, so they skip where a step asks its details (Part 2) between its decisions and the next step's.

Builder step: Your agency

Q1. Will you have branch offices?

A branch offers the same services within part of your service area and is supervised by the parent office every day (Chapter 26, 5.2). CDPHE charges a fee for each branch.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 1.3 Policies and procedures: adoption, staff access and annual review
  - Policy 1.4 Office, workstations and branch offices
  - Policy 3.4 Emergency risk assessment and preparedness plan
  - Policy 4.7 Supervisors and supervision of homemakers and personal care workers
- Decides whether the builder asks Q14 and Q15.

Q2. Will you have workstations (sites only for direct care staff's convenience)?

Workstations may hold phones, supplies and policies but not consumer records, and may not take referrals or serve the public (Chapter 26, 2.33). CDPHE charges a fee for each.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.4 Office, workstations and branch offices
  - Policy 3.4 Emergency risk assessment and preparedness plan
- Decides whether the builder asks Q16.

Q3. Will you provide Medicaid personal care (Community First Choice)?

Since July 1, 2025, Medicaid pays for personal care only from a Class A or B licensed agency, which also needs Medicaid certification and HCPF provider enrollment. This manual covers the CDPHE license rules; it does not cover HCPF's Medicaid billing and program rules.

☐ No, private pay only for now (builder default)
☐ Yes, or we plan to

What it changes:

- Changes the wording of 7 policies:
  - Policy 1.4 Office, workstations and branch offices
  - Policy 1.5 License, insurance, renewal, changes and closure
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 2.3 Admission, intake assessment, service plan and coordination of care
  - Policy 2.4 Notices at the start of services: disclosure, rights, advance directives, payment and hotline
  - Policy 2.6 Charges, billing changes and consumers' money
  - Policy 5.2 Consumer access to records and release of information

Q4. Do you serve, or expect to serve, 51 or more consumers at a time?

Chapter 2, 7.2 asks agencies with a client capacity of 51 or more for a written grievance mechanism plan. CDPHE has not said how capacity is measured for home care, so the manual adds the plan when you answer yes.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 3 policies:
  - Policy 3.1 Complaints and grievances
  - Policy 4.4 Orientation on hire
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
- Decides whether the builder asks Q61.

Builder step: Services and consumers

Q17. Will you provide personal care?

Non-medical help with activities of daily living such as bathing, dressing, eating, toileting, transfers and moving around, plus medication reminders (Chapter 26, 7.4). Homemaker and companion services still need a Class B license in Colorado.

☐ Yes (builder default)
☐ No, only homemaker and companion services

What it changes:

- Policy 2.2 Medication reminders applies only when Q17 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 13 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 2.3 Admission, intake assessment, service plan and coordination of care
  - Policy 2.5 Consumer rights, including freedom from restraint
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.4 Orientation on hire
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records
  - Policy 4.7 Supervisors and supervision of homemakers and personal care workers
  - Policy 4.8 Personnel records and annual performance evaluations
  - Policy 5.1 Consumer records, service notes and information management
  - Policy 5.4 Quality management program and plan
- Decides whether the builder asks Q22, Q23, Q24, Q25, Q26, Q27 and Q28.

Q18. Will you provide light housekeeping?

Routine light house cleaning, dishwashing and bed making (Chapter 26, 7.3(F)(1)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do

- Policy 4.1 Job descriptions, qualifications and competence
- Policy 4.6 Competency evaluations, skills validation and training records

Q19. Will you provide meal preparation?

Workers who prepare meals should be told about any special diet the consumer needs (Chapter 26, 7.3(F)(1)(a)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 6 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 2.3 Admission, intake assessment, service plan and coordination of care
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records

Q20. Will you help with shopping, laundry and other errands?

Help completing activities outside the home, such as shopping or laundry (Chapter 26, 7.3(F)(2)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 2.6 Charges, billing changes and consumers' money
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.6 Competency evaluations, skills validation and training records

Q21. Will you provide companionship?

Social interaction, conversation, emotional reassurance and activities that stimulate the mind (Chapter 26, 7.3(F)(3)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.6 Competency evaluations, skills validation and training records

Q22. Will workers go with consumers to appointments and on errands?

Only asked if Q17 is "Yes".

Accompanying the consumer to medical appointments, banking, shopping and other outings, as the service plan says, when all the care on the trip is unskilled personal care (Chapter 26, 7.4(F)(16)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence

Q23. Will you provide respite care?

Only asked if Q17 is "Yes".

Care in the consumer's home that gives a family caregiver a break, as long as it needs no skilled services (Chapter 26, 7.4(F)(18)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence

Q24. Which transfers will workers help with?

Only asked if Q17 is "Yes".

Without a lift device, workers never transfer a consumer who cannot assist; the rule lets trained workers who have shown competency assist with a transfer involving a lift device. Gait belts and other equipment need training first, and lift devices need training and demonstrated competency (Chapter 26, 7.4(F)(13)).

☐ Only consumers who can stand, pivot and help with the transfer, without a lift device (builder default)
☐ Also transfers with a lift device, once the worker is trained and has shown competency

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records

Q25. Will workers put on support stockings?

Only asked if Q17 is "Yes".

Includes ace bandages and anti-embolic or pressure stockings sold without a prescription. A qualified individual trains the worker and checks competency before the first application and every year (Chapter 26, 7.4(F)(4)).

☐ No (builder default)
☐ Yes, after training and a competency check, repeated every year

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records

Q26. Will workers use over-the-counter medicated shampoos?

Only asked if Q17 is "Yes".

Prescription shampoos are never used. Over-the-counter medicated shampoos need agency training and a competency check before first use and every year (Chapter 26, 7.4(F)(7)).

☐ No (builder default)
☐ Yes, after training and a competency check, repeated every year

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence

- Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
- Policy 4.6 Competency evaluations, skills validation and training records

Q27. Will workers change oxygen tanks?

Only asked if Q17 is "Yes".

Respiratory care is skilled care, but a specifically trained worker who has shown competency may set oxygen flow by written instruction when changing tanks (Chapter 26, 7.4(F)(15)).

☐ No (builder default)
☐ Yes, setting the flow by written instruction, after specific training and a competency check

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records

Q28. Will you serve consumers who need supervision to prevent wandering?

Only asked if Q17 is "Yes".

For example people living with dementia. Workers giving this protective oversight are trained in appropriate intervention and redirection techniques first (Chapter 26, 7.4(F)(17)).

☐ Yes, with workers trained in intervention and redirection (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.1 Services offered and what workers do and do not do
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records

Q29. Will you serve people aged 70 or older?

Home care agency staff must report suspected mistreatment of an at-risk elder (anyone 70 or older) to law enforcement within 24 hours (C.R.S. 18-6.5-108).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions

Q30. Will you serve adults with an intellectual or developmental disability?

The same law-enforcement reporting duty covers at-risk adults with an intellectual or developmental disability (C.R.S. 18-6.5-108). Training covers the needs of the populations you serve (Chapter 26, 7.3(C)(1)(h)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions

Q31. Will you serve children under 18?

Staff caring for children report suspected abuse or neglect to the county department, local law enforcement or the child abuse hotline (Chapter 26, 5.8(D)(2)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 9 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 2.3 Admission, intake assessment, service plan and coordination of care
  - Policy 2.4 Notices at the start of services: disclosure, rights, advance directives, payment and hotline
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 4.4 Orientation on hire

- Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
- Policy 4.6 Competency evaluations, skills validation and training records
- Policy 5.2 Consumer access to records and release of information
- Policy 5.3 Keeping and disposing of records

Builder step: People and dates

Q33. Who governs the agency?

A Class B agency may convene a governing body or designate one individual who has responsibility for all its tasks (Chapter 26, 7.1(A)).

☐ One person designated to carry out every governing body task (usually the owner) (builder default)
☐ A governing body (for example a board or the members of the company) that meets and keeps minutes

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.1 Governing body or designee, bylaws and annual review of operations
  - Policy 1.2 HCA manager and alternate: qualifications, training and duties
- When Q33 is "One person designated to carry out every governing body task (usually the owner)", job titles change throughout: "the governing body" reads "the governing body designee".
- Changes what the manual's cover page lists.

Q34. How does your HCA manager meet the experience requirement?

Every manager is also at least 21 with a high school diploma or GED (Chapter 26, 7.2(B)(1)). The proof goes in the manager's personnel file.

☐ At least one year of documented experience supervising personal care services (builder default)
☐ A college degree in healthcare services plus at least one year of health care work in the last ten years
☐ A college degree in any field plus at least two years of health care work in the last ten years

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.2 HCA manager and alternate: qualifications, training and duties
  - Policy 4.1 Job descriptions, qualifications and competence

Q35. How has your manager met the 8-hour manager training requirement?

Either way the manager completes 12 hours of related training in the first year and every year after, and CDPHE may require more training when a manager relies on equivalent experience (Chapter 26, 7.2(B)(3)).

☐ Completed an 8-hour home care agency manager course (CDPHE publishes a list of approved trainings) (builder default)
☐ Documented previous job experience or education equivalent to the course

What it changes:

- Changes the wording of Policy 1.2 HCA manager and alternate: qualifications, training and duties.

Builder step: How you'll operate

Q46. How do you count each worker's 12 months of annual training?

Homemakers cover at least four topics and personal care workers and supervisors at least six every 12 months, counted from the start date or by calendar year as your policy says, prorated for months worked (Chapter 26, 7.3(C)(3); 7.4(C)(4)).

☐ By calendar year (January to December) (builder default)
☐ From each worker's start date

What it changes:

- Changes the wording of Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions.

Q47. Who gives your workers their initial training?

Initial training must be interactive (in person, online or a mix) and you always run the competency evaluation with visual observation yourself (Chapter 26, 7.3(B)-(C)).

☐ We train them ourselves (builder default)
☐ An outside training provider
☐ Both, depending on the worker

What it changes:

- Changes the wording of Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions.
- Decides whether the builder asks Q59.

Q48. How far will your criminal history checks search?

Every job applicant's check includes at least a Colorado search, done no more than 90 days before employment (Chapter 26, 5.9(C)(2)). A wider search is your choice; CDPHE can hold you to it once it is in your policy.

☐ Colorado criminal history, the rule's minimum (builder default)
☐ Colorado plus a national or multi-state search

What it changes:

- Changes the wording of Policy 4.2 Criminal history, CAPS and license checks.

Q49. Who pays for the criminal history check?

Either may pay (Chapter 26, 5.9(C)(3)).

☐ The agency (builder default)
☐ The applicant

What it changes:

- Changes the wording of Policy 4.2 Criminal history, CAPS and license checks.

Q50. When can a new hire start giving care after you request their CAPS check?

The CAPS check (Colorado's adult protective services database) is requested before hiring anyone for direct care. The law allows hiring before the result comes back (C.R.S. 26-3.1-111(6)(f)); results usually arrive within five business days.

☐ Only after the CAPS result is back and reviewed (builder default)
☐ Once the CAPS check is requested, before the result arrives

What it changes:

- Changes the wording of Policy 4.2 Criminal history, CAPS and license checks.

Q51. What pre-employment physical evaluation will you use?

Your policy sets the pre-employment physical evaluation and the work restrictions for staff with a communicable illness (Chapter 26, 5.13(C)). The rules do not say what the evaluation must be.

☐ A statement from a licensed health care provider (builder default)
☐ A health questionnaire the applicant completes, reviewed by the manager

What it changes:

- Changes the wording of Policy 3.5 Infection prevention and control and personnel health.

Q52. How will you offer flu vaccination each season?

Agencies offer employees and direct contractors the chance to be vaccinated each year, aim for 90% vaccinated and report the rate to CDPHE by May 15 (Chapter 2, 11.2.3-11.2.4).

☐ Tell every employee and contractor where they can get a flu shot, and record whether they had one (builder default)
☐ Arrange or pay for flu shots, for example a pharmacy voucher or an on-site clinic

What it changes:

- Changes the wording of Policy 3.6 Influenza vaccination of employees and contractors.

Q53. Who answers calls when the office is closed?

The manager or a designee is available for all hours workers are providing services (Chapter 26, 7.2(C)(8)).

☐ The manager, supervisor or their backups (builder default)
☐ Designated staff on a written on-call schedule

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.2 HCA manager and alternate: qualifications, training and duties
  - Policy 2.7 Scheduling, missed visits and backup coverage
  - Policy 4.7 Supervisors and supervision of homemakers and personal care workers

Q54. Will supervisors do some three-monthly supervisory visits by live video?

The three-monthly supervision may be done by an interactive audiovisual connection with the worker and consumer. The yearly evaluation and visits about complaints that can't be resolved remotely are always in person (Chapter 26, 7.8; 7.9).

☐ Yes, by live video with the worker and consumer, unless the consumer prefers in person (builder default)
☐ No, all supervisory visits are in person

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.3 Admission, intake assessment, service plan and coordination of care
  - Policy 2.5 Consumer rights, including freedom from restraint
  - Policy 3.1 Complaints and grievances
  - Policy 4.7 Supervisors and supervision of homemakers and personal care workers

Q55. How will you collect consumers' views on your services?

The agency has an ongoing way for consumers to comment on its services, and the findings go to the governing body at least once a year (Chapter 26, 7.1(D)(3)).

☐ At each supervisory visit
☐ At each supervisory visit, plus a yearly written survey (builder default)

What it changes:

- Changes the wording of 2 policies:
  - Policy 5.4 Quality management program and plan
  - Policy 5.5 Annual agency evaluation, consumer input and quarterly record review

Q56. How will you keep consumer records?

Electronic records need controls on who can enter or change data, and backup and recovery plans (Chapter 26, 5.15(B)).

☐ Partly on paper and partly electronically (builder default)
☐ On paper
☐ Electronically

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.3 Policies and procedures: adoption, staff access and annual review
  - Policy 3.4 Emergency risk assessment and preparedness plan
  - Policy 5.1 Consumer records, service notes and information management

Q57. Will any homemakers or personal care workers be contractors rather than employees?

Contracted personnel need a written contract covering the points in Chapter 26, 5.9(F) and follow your policies. Check Colorado's employment tests with a lawyer before using contractors.

☐ No, all are employees (builder default)
☐ Yes

What it changes:

- Policy 4.3 Contracted personnel applies only when Q57 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 12 policies:
  - Policy 1.3 Policies and procedures: adoption, staff access and annual review
  - Policy 2.4 Notices at the start of services: disclosure, rights, advance directives, payment and hotline
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 3.6 Influenza vaccination of employees and contractors
  - Policy 4.1 Job descriptions, qualifications and competence
  - Policy 4.2 Criminal history, CAPS and license checks
  - Policy 4.4 Orientation on hire
  - Policy 4.5 Homemaker and personal care worker training: initial, annual and exemptions
  - Policy 4.6 Competency evaluations, skills validation and training records
  - Policy 4.7 Supervisors and supervision of homemakers and personal care workers
  - Policy 4.8 Personnel records and annual performance evaluations

- Policy 5.5 Annual agency evaluation, consumer input and quarterly record review

Q58. Include recommended practices?

Some policies end with practical steps that go beyond the rules, such as TB screening for new hires and a county adult protective services report alongside the police report. Once adopted they are your policies and CDPHE can expect you to follow them, so leave them out if you won't.

☐ Yes, include them (builder default)
☐ No, only what the rules require

What it changes:

- Keeps or removes the "Recommended practice" section at the end of 30 policies. Once adopted, recommended practices are the agency's own commitments, so only keep them if the agency will follow them.
- Changes the wording of 5 policies:
  - Policy 3.3 Abuse, neglect and exploitation: prevention, investigation and mandatory reports
  - Policy 3.5 Infection prevention and control and personnel health
  - Policy 3.6 Influenza vaccination of employees and contractors
  - Policy 4.2 Criminal history, CAPS and license checks
  - Policy 5.3 Keeping and disposing of records

Also decide: commitments you write in Part 2

These details are commitments too: the manual prints them as what the agency will do, and the regulator can check that it does. Agree them at the same time.

- Q10. Office hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q15. How often the manager or supervisor visits each branch in person (pre-filled: At least once a month)
- Q40. Experience or training your supervisors must have (pre-filled: At least one year of paid experience giving or supervising personal care in a home care agency, assisted living residence or similar setting)
- Q60. Days to finish investigating a complaint (pre-filled: 14)
- Q62. Days to file service notes in the consumer record (pre-filled: 7)
- Q63. Days of written notice before a planned discharge (pre-filled: 10)

PART 2

Part 2. Agency details

These 28 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q5. Agency legal name

Required.

Exactly as registered with the Colorado Secretary of State and on your CDPHE application, including LLC or Inc. If you trade under another name, register that trade name too. The agency uses its licensed name on stationery, billing materials and signage (Chapter 2, 2.3.3(A)(4)).

Example: Sample Home Care, LLC
Prints in: the cover page and 33 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q6. Office address in Colorado

Required.

Every agency needs a physical business office in Colorado (Chapter 26, 5.1): a fixed office that keeps consumer information confidential and is a safe place to work (Chapter 26, 7.1(C)(7)). CDPHE's checklist accepts an office in a home or apartment if the lease allows a business there, and your local zoning authority signs CDPHE's zoning form. The license is displayed here.

Example: 100 Main Street, Suite 200, Denver, CO 80202
Prints in: the cover page and 13 policies (including 1.1, 1.3, 1.4 and 1.5)

Answer: _____

Q7. Office phone

Required.

Format: a full phone number, with area code
Example: (303) 555-0100
Prints in: 20 policies (including 1.4, 1.5, 2.1 and 2.2)

Answer: _____

Q8. Phone consumers and workers call when the office is closed

Required.

The manager or a designee must be available for all hours that workers are providing services (Chapter 26, 7.2(C)(8)), and a supervisor must be available to workers at all times care is being given (Chapter 26, 7.8(A)(1)). It can be the office number if calls are forwarded.

Format: a full phone number, with area code
Example: (303) 555-0199
Prints in: the cover page and 12 policies (including 1.2, 1.3, 2.1 and 2.2)

Answer: _____

Q9. Agency email address

Required.

Every licensee keeps a valid email address and internet access for CDPHE business (Chapter 2, 2.9.1). Printed in your notices so consumers can reach you in writing.

Example: office@samplehomecare.com
Prints in: 7 policies (including 1.4, 1.5, 2.4 and 2.6)

Answer: _____

Q10. Office hours

Pre-filled if left blank.

When the office is staffed. CDPHE may inspect without notice between 7 a.m. and 7 p.m., and the records a surveyor asks for start reaching them within 30 minutes (Chapter 26, 4.6(A)(1)(b)).

Format: days and times
Example: Monday to Friday, 8:00 a.m. to 5:00 p.m.
If left blank, prints as: Monday to Friday, 8:00 a.m. to 5:00 p.m.
Prints in: policies 1.2, 1.3, 1.4, 2.7, 4.4 and 5.2

Answer: _____

Q11. Days and hours consumers can receive services

Required.

For example "7 days a week, 24 hours a day" if you offer overnight or live-in care. A supervisor must be available to workers throughout these hours (Chapter 26, 7.8(A)(1)), and consumers who need care at set times need enough staff or a backup plan (Chapter 26, 5.14(A)(4)).

Example: 7 days a week, 7:00 a.m. to 10:00 p.m.
Prints in: policies 1.1, 1.2, 2.3, 2.7 and 4.7

Answer: _____

Q12. Counties you serve

Required.

You give CDPHE a list of the contiguous counties you plan to serve and assure adequate staffing, supervision and care across them (Chapter 26, 4.2(C)). Changing the service area needs 30 days' notice and CDPHE's approval (Chapter 2, 2.9.6).

Example: Denver, Adams and Arapahoe counties
Prints in: 7 policies (including 1.1, 1.5, 2.3 and 2.8)

Answer: _____

Q13. CDPHE license number

Optional.

Leave blank if you are still applying: the manual shows a space to write it in.

Example: 2300000000
Prints in: policies 1.1, 1.2, 1.5 and 1.6

Answer: _____

Q14. Your branch office addresses

Only asked, and then required, if Q1 is "Yes".

A branch offers the same services as the parent office, within part of its service area, and is supervised by the parent every day. Tell CDPHE in advance, with the branch fee, and 30 days before changing a branch's address or organization (Chapter 26, 5.2; 4.2(F)).

Example: 200 Pine Street, Colorado Springs, CO 80903
Prints in: policies 1.1, 1.3, 1.4 and 3.4

Answer: _____

Q15. How often the manager or supervisor visits each branch in person

Only asked, and then pre-filled if left blank, if Q1 is "Yes".

No rule sets this. Choose a frequency you will always keep. The parent agency's administrator, manager or supervisor visits the branch on site as agency policy says (Chapter 26, 5.2(D)). CDPHE can hold you to what you write here.

Example: At least once a month
If left blank, prints as: At least once a month
Prints in: policies 1.4 and 4.7

Answer: _____

Q16. Your workstation addresses

Only asked, and then required, if Q2 is "Yes".

A workstation is only for direct care staff's convenience: no referrals, marketing, administration, training, consumer records or public visits (Chapter 26, 2.33). Each workstation has a CDPHE fee.

Example: 300 Elm Street, Unit 4, Aurora, CO 80012
Prints in: policies 1.4 and 3.4

Answer: _____

Builder step: Services and consumers

Q32. Your charges

Required.

Write it the way a consumer would read it. Used in the payment information you give within one business day of starting services (Chapter 26, 5.6(D)). These are your prices, not a state fee. A rate increase for all consumers needs 30 days' written notice (Chapter 26, 5.3(A)(5)(a)).

Example: $36.00 per hour for all services, with a 3-hour minimum visit
Prints in: policies 2.3, 2.4 and 2.6

Answer: _____

Builder step: People and dates

Q36. Governing body members, or the person designated to act as the governing body

Required.

A Class B agency may convene a governing body or designate one individual who takes on all its tasks; at least one member, or the designee, must know home care operations (Chapter 26, 7.1(A)-(B)). This person or body adopts the manual.

Example: Morgan Ellis, Owner and Managing Member
Prints in: the cover page and 16 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q37. HCA manager

Required.

The manager supervises the agency's services and must be at least 21 with a high school diploma or GED and the experience you choose below (Chapter 26, 7.2(B)). The manager is fingerprinted through the Colorado Bureau of Investigation with the application, and within 10 days of any change of manager (Chapter 26, 4.2(D)).

Example: Jordan Lee
Prints in: the cover page and 33 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q38. Staff member who acts when the manager is absent

Required.

The manager designates in writing a qualified staff member to act in their absence (Chapter 26, 7.2(C)(7)). The manual includes the designation form.

Example: Taylor Brooks
Prints in: the cover page and 9 policies (including 1.1, 1.2, 1.6 and 2.7)

Answer: _____

Q39. Supervisor of homemakers and personal care workers

Required.

An employee at least 18, trained in personal care, with the experience your policy sets below (Chapter 26, 7.7). Colorado does not require a nurse for Class B. It can be the manager if they also meet these qualifications.

Example: Casey Morgan
Prints in: the cover page and 27 policies (including 1.1, 1.3, 1.6 and 2.1)

Answer: _____

Q40. Experience or training your supervisors must have

Pre-filled if left blank.

Colorado leaves this to your policy. Choose a standard every supervisor, including the backup, meets today. Supervisors have "appropriate experience or training in the home care industry or closely related personal care services in accordance with HCA policy" (Chapter 26, 7.7(A)(2)). CDPHE checks your supervisors against what you write here.

Example: At least one year of paid experience giving or supervising personal care in a home care agency, assisted living residence or similar setting
If left blank, prints as: At least one year of paid experience giving or supervising personal care in a home care agency, assisted living residence or similar setting
Prints in: policies 4.1 and 4.7

Answer: _____

Q41. Backup supervisor

Required.

A qualified supervisor must be available to workers at all times care is being given (Chapter 26, 7.8(A)(1)), so the manual names a backup who meets the same qualifications. It can be the manager or the alternate manager if they qualify.

Example: Riley Chen
Prints in: the cover page and 19 policies (including 1.1, 2.1, 2.2 and 2.3)

Answer: _____

Q42. Person who takes and resolves complaints

Required.

The notice of consumer rights says how to contact the agency employee responsible for complaint intake and problem resolution (Chapter 26, 5.6(B)(2)). Usually the manager.

Example: Jordan Lee, HCA manager
Prints in: 7 policies (including 1.1, 1.4, 2.4 and 2.5)

Answer: _____

Q43. Person who trains workers and checks their competency

Required.

Before a personal care worker is assigned, the manager or a supervisor checks their competency in hands-on tasks (Chapter 26, 7.4(C)(3)(a)), and written tests are overseen by someone at least as qualified (Chapter 26, 5.9(B)(2)(a)(i)). Name the manager or a supervisor.

Example: Casey Morgan, Supervisor
Prints in: policies 1.1, 1.2, 3.5, 4.4, 4.5 and 4.6

Answer: _____

Q44. Date you adopt the manual

Required.

Format: a date
Example: November 1, 2026
Prints in: the cover page and policies 1.3 and 3.1

Answer: _____

Q45. Next review date

Required.

Within one year of adoption: the governing body reviews policies at least once a year (Chapter 26, 7.1(C)(3)).

Format: a date
Example: November 1, 2027
Prints in: the cover page and 7 policies (including 1.1, 1.3, 1.5 and 3.4)

Answer: _____

Builder step: How you'll operate

Q59. Outside training provider you use

Only asked, and then required, if Q47 is not "We train them ourselves".

If another organization trains your workers, you check its program covers every required topic and keep proof each worker completed it (Chapter 26, 7.3(B)(1)). You still run the competency evaluation yourself.

Example: Sample Caregiver Academy, online homemaker and personal care course
Prints in: policy 4.5

Answer: _____

Q60. Days to finish investigating a complaint

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your complaint policy covers investigating, documenting and resolving each complaint and telling the complainant the result (Chapter 26, 5.7(A)). CDPHE can hold you to the number you choose.

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policy 3.1

Answer: _____

Q61. Client care advocate for grievances

Only asked, and then required, if Q4 is "Yes".

Agencies with a client capacity of 51 or more have a written grievance mechanism plan with a client care advocate who acts as the liaison between consumers and the agency, acknowledges each grievance within 3 working days and responds in writing within 15 business days (Chapter 2, 7.2).

Example: Avery Quinn, Client Care Coordinator
Prints in: policy 3.1

Answer: _____

Q62. Days to file service notes in the consumer record

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Workers complete service notes for each visit with the date and time in and out, according to agency policy (Chapter 26, 7.3(E)(2)). Records kept in a consumer's home must reach CDPHE within 2 hours if the last visit was 14 or more days earlier (Chapter 26, 4.6(A)(1)(a)).

Format: a whole number of up to three digits
Example: 7
If left blank, prints as: 7
Prints in: 7 policies (including 1.6, 2.8, 3.4 and 4.3)

Answer: _____

Q63. Days of written notice before a planned discharge

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Before discharging, the agency documents its efforts to resolve the problem and tells the consumer verbally and in writing why (Chapter 26, 5.5(D)). Emergency discharges to protect staff are reported to CDPHE within 48 hours (Chapter 26, 5.5(E)(1)).

Format: a whole number of up to three digits
Example: 10
If left blank, prints as: 10
Prints in: policy 2.8

Answer: _____

PART 3

Part 3. Sample completed questionnaire

This is the questionnaire filled in for Sample Home Care, LLC, a fictional agency, with the builder's example answers and default choices. It is an illustration of the format, not a recommendation: every agency's answers will differ.

Builder step: Your agency

	Question	Sample answer
Q1	Will you have branch offices?	No
Q2	Will you have workstations (sites only for direct care staff's convenience)?	No
Q3	Will you provide Medicaid personal care (Community First Choice)?	No, private pay only for now
Q4	Do you serve, or expect to serve, 51 or more consumers at a time?	No
Q5	Agency legal name	Sample Home Care, LLC
Q6	Office address in Colorado	100 Main Street, Suite 200, Denver, CO 80202
Q7	Office phone	(303) 555-0100
Q8	Phone consumers and workers call when the office is closed	(303) 555-0199
Q9	Agency email address	office@samplehomecare.com
Q10	Office hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q11	Days and hours consumers can receive services	7 days a week, 7:00 a.m. to 10:00 p.m.
Q12	Counties you serve	Denver, Adams and Arapahoe counties
Q13	CDPHE license number	2300000000
Q14	Your branch office addresses	Not asked with these answers
Q15	How often the manager or supervisor visits each branch in person	Not asked with these answers
Q16	Your workstation addresses	Not asked with these answers

Builder step: Services and consumers

	Question	Sample answer
Q17	Will you provide personal care?	Yes

	Question	Sample answer
Q18	Will you provide light housekeeping?	Yes
Q19	Will you provide meal preparation?	Yes
Q20	Will you help with shopping, laundry and other errands?	Yes
Q21	Will you provide companionship?	Yes
Q22	Will workers go with consumers to appointments and on errands?	Yes
Q23	Will you provide respite care?	Yes
Q24	Which transfers will workers help with?	Only consumers who can stand, pivot and help with the transfer, without a lift device
Q25	Will workers put on support stockings?	No
Q26	Will workers use over-the-counter medicated shampoos?	No
Q27	Will workers change oxygen tanks?	No
Q28	Will you serve consumers who need supervision to prevent wandering?	Yes, with workers trained in intervention and redirection
Q29	Will you serve people aged 70 or older?	Yes
Q30	Will you serve adults with an intellectual or developmental disability?	No
Q31	Will you serve children under 18?	No
Q32	Your charges	$36.00 per hour for all services, with a 3-hour minimum visit

Builder step: People and dates

	Question	Sample answer
Q33	Who governs the agency?	One person designated to carry out every governing body task (usually the owner)
Q34	How does your HCA manager meet the experience requirement?	At least one year of documented experience supervising personal care services
Q35	How has your manager met the 8-hour manager training requirement?	Completed an 8-hour home care agency manager course (CDPHE publishes a list of approved trainings)
Q36	Governing body members, or the person designated to act as the governing body	Morgan Ellis, Owner and Managing Member
Q37	HCA manager	Jordan Lee

	Question	Sample answer
Q38	Staff member who acts when the manager is absent	Taylor Brooks
Q39	Supervisor of homemakers and personal care workers	Casey Morgan
Q40	Experience or training your supervisors must have	At least one year of paid experience giving or supervising personal care in a home care agency, assisted living residence or similar setting
Q41	Backup supervisor	Riley Chen
Q42	Person who takes and resolves complaints	Jordan Lee, HCA manager
Q43	Person who trains workers and checks their competency	Casey Morgan, Supervisor
Q44	Date you adopt the manual	November 1, 2026
Q45	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q46	How do you count each worker's 12 months of annual training?	By calendar year (January to December)
Q47	Who gives your workers their initial training?	We train them ourselves
Q48	How far will your criminal history checks search?	Colorado criminal history, the rule's minimum
Q49	Who pays for the criminal history check?	The agency
Q50	When can a new hire start giving care after you request their CAPS check?	Only after the CAPS result is back and reviewed
Q51	What pre-employment physical evaluation will you use?	A statement from a licensed health care provider
Q52	How will you offer flu vaccination each season?	Tell every employee and contractor where they can get a flu shot, and record whether they had one
Q53	Who answers calls when the office is closed?	The manager, supervisor or their backups
Q54	Will supervisors do some three-monthly supervisory visits by live video?	Yes, by live video with the worker and consumer, unless the consumer prefers in person
Q55	How will you collect consumers' views on your services?	At each supervisory visit, plus a yearly written survey

	Question	Sample answer
Q56	How will you keep consumer records?	Partly on paper and partly electronically
Q57	Will any homemakers or personal care workers be contractors rather than employees?	No, all are employees
Q58	Include recommended practices?	Yes, include them
Q59	Outside training provider you use	Not asked with these answers
Q60	Days to finish investigating a complaint	14
Q61	Client care advocate for grievances	Not asked with these answers
Q62	Days to file service notes in the consumer record	7
Q63	Days of written notice before a planned discharge	10

What these answers do to the manual

- Policy 4.3 Contracted personnel prints as "Not applicable", because it applies only when Q57 is "Yes".
- Job titles change throughout: "the governing body" reads "the governing body designee".
- In 28 policies, passages written for other answers are left out and the ones that match these answers are kept, so the manual describes only the services and arrangements this agency chose.
- Every name, phone number, address and date above prints where the manual needs it. Part 2 shows where each one prints.

How answers become policy text

Examples from the manual itself, with the sample answers filled in.

Q57. Will any homemakers or personal care workers be contractors rather than employees?

In Policy 1.3 Policies and procedures: adoption, staff access and annual review, the sample answer "No, all are employees" prints:

> 10. **Contracted personnel.** Sample Home Care, LLC uses no contracted personnel. If it does in future, personnel policies will be available to every contracted worker, as Chapter 26, 5.9(F)(2) requires (Policy 4.3).
>
> `Policy 1.3 Policies and procedures: adoption, staff access and annual review, sample answer`

The answer "Yes" prints this instead:

> 10. **Contracted personnel.** Personnel policies must be available to all contracted personnel (Chapter 26, 5.9(F)(2)). Contracted workers have the same access to the manual as employees, and their contract requires them to follow it (Policy 4.3).
>
> `Policy 1.3 Policies and procedures: adoption, staff access and annual review, other answer`

Q3. Will you provide Medicaid personal care (Community First Choice)?

In Policy 2.6 Charges, billing changes and consumers' money, the sample answer "No, private pay only for now" prints:

> 3. **Payment by the consumer.** Sample Home Care, LLC does not bill Medicaid. Consumers, or the person or organization named on their payment information notice, pay Sample Home Care, LLC directly. Where a consumer claims from long-term care insurance or another program, the consumer remains responsible for paying the agency unless the insurer or program has agreed in writing to pay the agency directly.
>
> `Policy 2.6 Charges, billing changes and consumers' money, sample answer`

The answer "Yes, or we plan to" prints this instead:

> 3. **Medicaid.** For a consumer whose services are paid by Health First Colorado (Colorado's Medicaid program), the Colorado Department of Health Care Policy and Financing (HCPF) sets the rules for what is billed to Medicaid and what, if anything, the consumer may be charged. This manual does not cover HCPF's rules. The HCA manager keeps HCPF's current rules and bills Medicaid consumers only as they allow. The rights and notices in this policy still apply.
>
> `Policy 2.6 Charges, billing changes and consumers' money, other answer`

Q17. Will you provide personal care?

Policy 2.2 Medication reminders prints in full only when Q17 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC does not provide personal care, so its workers do not give medication reminders or help with medications in any way. If this changes, the agency will adopt this policy first and follow Chapter 26, Part 7.4(F)(14) and (G).
>
> `Policy 2.2 Medication reminders, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 2.5, Consumer rights, including freedom from restraint, as it prints in the Colorado manual: https://www.carerulebook.com/samples/us-colorado-home-care.pdf