CARERULEBOOK GEORGIA MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Georgia manual builder asks: 8 decisions and 14 details, 22 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/georgia/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 [Licensed location address]) 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
- Administrator
- Registered nurse
- Supervisor for personal care
- Supervisor for companion and sitter tasks

PART 1

Part 1. Decisions to settle first

These 8 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: How you'll operate

Q14. Will you provide personal care tasks?

Hands-on help such as bathing, toileting, grooming, dressing, eating and transfers, performed by personal care assistants (PCAs).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 14 policies:
  - Policy 1.2 Organizational structure and lines of authority
  - Policy 2.1 Scope of services and clients served
  - Policy 2.2 Client rights, conduct and responsibilities
  - Policy 2.4 Client service agreement and disclosure
  - Policy 2.5 Client care practices
  - Policy 2.6 Client funds, vehicles and transportation
  - Policy 3.1 Staffing policies
  - Policy 4.1 Orientation, job training and competency
  - Policy 5.1 Individualized service plan
  - Policy 5.2 Supervision of personnel
  - Policy 5.3 Backup services
  - Policy 7.1 Infection control
  - Policy 8.1 Emergency preparedness and response plan
  - Policy 10.1 Client records: use, removal and release

- Decides whether the builder asks Q10 and Q17.
- Changes what the manual's cover page lists.

Q15. Will you provide companion or sitter tasks?

Company, supervision, meal preparation, housekeeping, transportation and escort, with no hands-on personal care.

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 12 policies:
  - Policy 1.2 Organizational structure and lines of authority
  - Policy 2.1 Scope of services and clients served
  - Policy 2.2 Client rights, conduct and responsibilities
  - Policy 2.3 Complaints, grievances and investigations
  - Policy 2.5 Client care practices
  - Policy 3.1 Staffing policies
  - Policy 4.1 Orientation, job training and competency
  - Policy 5.1 Individualized service plan
  - Policy 5.2 Supervision of personnel
  - Policy 7.1 Infection control
  - Policy 8.1 Emergency preparedness and response plan
  - Policy 10.1 Client records: use, removal and release
- Decides whether the builder asks Q11.
- Changes what the manual's cover page lists.

Q16. Will you provide nursing services?

Care by a licensed RN or LPN under RN supervision. Most new private home care providers start without it.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 11 policies:
  - Policy 1.2 Organizational structure and lines of authority
  - Policy 2.1 Scope of services and clients served
  - Policy 2.2 Client rights, conduct and responsibilities
  - Policy 2.5 Client care practices

- Policy 3.1 Staffing policies
- Policy 4.1 Orientation, job training and competency
- Policy 5.1 Individualized service plan
- Policy 5.2 Supervision of personnel
- Policy 5.4 Daily service documentation
- Policy 8.1 Emergency preparedness and response plan
- Policy 10.1 Client records: use, removal and release

Q17. How will your personal care assistants qualify?

Only asked if Q14 is "Yes".

Georgia accepts either (111-8-65-.09(5)(c)). If you run the 40-hour program, the manual includes its topics and competency check.

☐ Only hire aides who already qualify (nurse aide program, exam, approved credential, or a 40-hour program completed with another provider)
☐ Also train new aides through our own 40-hour program (builder default)

What it changes:

- Changes the wording of 3 policies:
  - Policy 4.1 Orientation, job training and competency
  - Policy 7.1 Infection control
  - Policy 8.1 Emergency preparedness and response plan

Q18. Will staff ever handle a client's money for home management?

For example, shopping with the client's cash or card. Needs written authorization, and staff with unlimited access must be bonded.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Scope of services and clients served
  - Policy 2.4 Client service agreement and disclosure
  - Policy 2.6 Client funds, vehicles and transportation
  - Policy 3.2 Personnel records

Q19. Will staff drive clients?

Georgia requires a signed waiver or proof of motor vehicle insurance when staff drive clients in a vehicle that is not the client's.

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 2.1 Scope of services and clients served
  - Policy 2.4 Client service agreement and disclosure
  - Policy 2.6 Client funds, vehicles and transportation

Q20. Will you use contracted nurses?

DCH says only RNs and LPNs can be contractors in a private home care provider. Aides must be employees.

☐ No (builder default)
☐ Yes

What it changes:

- Policy 1.4 Independent contractors and arranged services applies only when Q20 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 14 policies:
  - Policy 1.2 Organizational structure and lines of authority
  - Policy 1.3 Surveyor entry and survey cooperation
  - Policy 2.2 Client rights, conduct and responsibilities
  - Policy 2.3 Complaints, grievances and investigations
  - Policy 2.5 Client care practices
  - Policy 2.6 Client funds, vehicles and transportation
  - Policy 3.1 Staffing policies
  - Policy 3.2 Personnel records
  - Policy 3.4 Employee health and TB screening
  - Policy 4.1 Orientation, job training and competency
  - Policy 5.2 Supervision of personnel
  - Policy 6.1 Reporting abuse, neglect and exploitation
  - Policy 7.1 Infection control
  - Policy 8.1 Emergency preparedness and response plan

Q21. Include recommended practices?

Some policies end with practical steps that go beyond the rules. Once you adopt them, DCH 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 25 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 2 policies:
  - Policy 7.1 Infection control
  - Policy 8.1 Emergency preparedness and response plan

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.

- Q5. Office operating hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q22. Days to finish investigating a complaint (pre-filled: 14)

PART 2

Part 2. Agency details

These 14 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q1. Agency legal name

Required.

Your agency's full legal name, as registered with the Georgia Secretary of State and on your DCH application, including LLC or Inc.

Example: Sample Home Care, LLC
Prints in: the cover page and 25 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q2. Licensed location address

Required.

The address on your license. Each office location needs its own license, and DCH needs 15 days' notice before you move (Ga. Comp. R. & Regs. 111-8-65-.05).

Example: 100 Peachtree Street NE, Suite 200, Atlanta, GA 30303
Prints in: the cover page and policies 1.1, 1.3, 1.4, 2.2, 2.3 and 10.1

Answer: _____

Q3. Office phone

Required.

Every client gets this number for questions and complaints (111-8-65-.12(4)).

Format: a full phone number, with area code
Example: (404) 555-0100
Prints in: 9 policies (including 1.2, 2.2, 2.3 and 2.4)

Answer: _____

Q4. After-hours phone for clients and staff

Required.

The number clients and staff call when the office is closed, including to reach a supervisor or nurse.

Format: a full phone number, with area code
Example: (404) 555-0199
Prints in: 10 policies (including 1.2, 2.2, 2.3 and 2.5)

Answer: _____

Q5. Office operating hours

Pre-filled if left blank.

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 2.2, 2.3, 5.2, 5.3, 6.1 and 8.1

Answer: _____

Q6. Counties you serve

Required.

The counties named on your DCH permit. Ask DCH (hfrd.phcp@dch.ga.gov) before adding counties.

Format: one or more counties, picked from the builder's list
Example: Fulton, DeKalb and Cobb counties
Prints in: policies 1.1, 2.1 and 8.1

Answer: _____

Builder step: People and dates

Q7. Governing body

Required.

The person or group with legal authority over the agency, which adopts every policy (111-8-65-.04). For a single-member LLC this is usually the owner.

Example: the members of Sample Home Care, LLC
Prints in: the cover page and policies 1.1, 1.2, 1.3, 2.1, 3.3 and 9.1

Answer: _____

Q8. Administrator

Required.

The person the governing body appoints with full authority and responsibility for running the agency (111-8-65-.09(3)). DCH checks their signed job description and orientation at application.

Example: Jordan Lee
Prints in: the cover page and 22 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q9. Registered nurse

Required.

DCH requires a Georgia RN on every initial application, whatever services you offer. The RN can also be the administrator or owner. The RN supervises personal care for medically frail clients and any nursing services.

Example: Taylor Brooks, RN
Prints in: the cover page and 16 policies (including 1.1, 1.2, 1.4 and 2.2)

Answer: _____

Q10. Supervisor for personal care

Only asked, and then required, if Q14 is "Yes".

Only if you provide personal care tasks. Must be qualified by education, training and experience; for medically frail clients the supervisor must be an RN or LPN (111-8-65-.10(2)(b)).

Example: Taylor Brooks, RN
Prints in: the cover page and 10 policies (including 1.2, 2.2, 2.5 and 3.1)

Answer: _____

Q11. Supervisor for companion and sitter tasks

Only asked, and then required, if Q15 is "Yes".

Only if you provide companion or sitter tasks. An RN, LPN, the administrator or another staff member assigned to supervise (111-8-65-.10(2)(c)).

Example: Jordan Lee
Prints in: the cover page and 11 policies (including 1.2, 2.2, 2.3 and 2.5)

Answer: _____

Q12. Date you adopt the manual

Required.

Format: a date
Example: November 1, 2026
Prints in: the cover page and policy 1.1

Answer: _____

Q13. Next review date

Required.

Usually one year after you adopt the manual.

Format: a date
Example: November 1, 2027
Prints in: the cover page and policy 1.1

Answer: _____

Builder step: How you'll operate

Q22. Days to finish investigating a complaint

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Georgia's rules say complaints must be investigated within a reasonable period of time and resolved in a timely manner, but set no number of days (111-8-65-.12(2)(f), (3)). DCH 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 2.3

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	Agency legal name	Sample Home Care, LLC
Q2	Licensed location address	100 Peachtree Street NE, Suite 200, Atlanta, GA 30303
Q3	Office phone	(404) 555-0100
Q4	After-hours phone for clients and staff	(404) 555-0199
Q5	Office operating hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q6	Counties you serve	Fulton, DeKalb and Cobb counties

Builder step: People and dates

	Question	Sample answer
Q7	Governing body	the members of Sample Home Care, LLC
Q8	Administrator	Jordan Lee
Q9	Registered nurse	Taylor Brooks, RN
Q10	Supervisor for personal care	Taylor Brooks, RN
Q11	Supervisor for companion and sitter tasks	Jordan Lee
Q12	Date you adopt the manual	November 1, 2026
Q13	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q14	Will you provide personal care tasks?	Yes
Q15	Will you provide companion or sitter tasks?	Yes
Q16	Will you provide nursing services?	No
Q17	How will your personal care assistants qualify?	Also train new aides through our own 40-hour program

	Question	Sample answer
Q18	Will staff ever handle a client's money for home management?	No
Q19	Will staff drive clients?	Yes
Q20	Will you use contracted nurses?	No
Q21	Include recommended practices?	Yes, include them
Q22	Days to finish investigating a complaint	14

What these answers do to the manual

- Policy 1.4 Independent contractors and arranged services prints as "Not applicable", because it applies only when Q20 is "Yes".
- In 20 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.

Q14. Will you provide personal care tasks?

In Policy 2.1 Scope of services and clients served, the sample answer "Yes" prints:

> - Is the person likely to be medically frail or medically compromised, so that an RN or LPN supervises and an RN completes the initial service plan?
>
> `Policy 2.1 Scope of services and clients served, sample answer`

The answer "No" prints this instead:

> 5. **Medically frail or medically compromised clients.** The rules on nurse supervision of personal care for medically frail or medically compromised clients (.10(2)(b), (d)) apply to personal care tasks, which Sample Home Care, LLC does not provide. A client whose needs go beyond the services offered above is handled under item 7 and the Procedure below.
>
> `Policy 2.1 Scope of services and clients served, other answer`

Q15. Will you provide companion or sitter tasks?

In Policy 2.5 Client care practices, the sample answer "Yes" prints:

> - a companion or sitter must report on the client's needs, on changes in the client's condition, and on any observed problems that affect the client;
>
> `Policy 2.5 Client care practices, sample answer`

The answer "No" prints this instead:

> 5. **Companion or sitter tasks.** Sample Home Care, LLC does not provide companion or sitter tasks as a separate service.
>
> `Policy 2.5 Client care practices, other answer`

Q20. Will you use contracted nurses?

Policy 1.4 Independent contractors and arranged services prints in full only when Q20 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC does not use contracted staff. All services are provided by its own employees. If it decides to contract with licensed nurses, it will adopt this policy, and put the arrangement in writing, before any contracted service starts.
>
> `Policy 1.4 Independent contractors and arranged services, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 6.1, Reporting abuse, neglect and exploitation, as it prints in the Georgia manual: https://www.carerulebook.com/samples/us-georgia-home-care.pdf