CARERULEBOOK ILLINOIS MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Illinois manual builder asks: 22 decisions and 16 details, 38 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/illinois/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: 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]) 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

- Agency manager
- Person who acts for the agency manager when they are absent
- Supervisor of home services workers
- Alzheimer's services supervisor

PART 1

Part 1. Decisions to settle first

These 22 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: Services you offer

Q9. What services will you provide?

Home services means help with activities of daily living, housekeeping, personal laundry and companionship. Personal care adds hands-on tasks such as bathing, toileting and transfers, each with its own training and competency rules (245.40(c)(4)).

☐ Personal care, plus companion and homemaker services (builder default)
☐ Companion and homemaker services only (no hands-on personal care)

What it changes:

- Changes the wording of 10 policies:
  - Policy 1.1 Governing body, bylaws and policy adoption
  - Policy 2.1 Scope of services and fee schedule
  - Policy 2.2 Acceptance of clients
  - Policy 3.1 Job descriptions
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do
  - Policy 5.4 Alzheimer’s disease and related dementias services
  - Policy 5.6 Visit records, observation and reporting
- Decides whether the builder asks Q10, Q11, Q12, Q13, Q14, Q15, Q16, Q17, Q18, Q19 and Q20.

Q10. Will workers help clients bathe?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Tub, shower, sponge or bed baths. Needs training in each client's bath and a competency check, repeated every year (245.40(c)(4)(C)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q11. Will workers help with transfers?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Only for clients who can reliably stand and pivot and help with the transfer (directly or by giving feedback), after training on the client's equipment and a competency check (245.40(c)(4)(M)).

☐ Yes, including gait belts and adaptive equipment (builder default)
☐ Yes, also mechanical or electrical lifts
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q12. Will workers help clients change position?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Complete repositioning for a client who cannot signal is allowed only when the client's representative can help or give feedback, after training and a competency check (245.40(c)(4)(J); 245.210(d)(2)).

☐ Yes, for clients who can signal when they need to move (builder default)
☐ Yes, also clients who need complete repositioning and cannot signal it
☐ No

What it changes:

- Changes the wording of 6 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 2.2 Acceptance of clients
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q13. Will workers help clients eat?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Only for clients who swallow on their own and can sit upright. Thickeners need training and a competency check; a client at high risk of choking needs a home health or home nursing agency (245.40(c)(4)(F)).

☐ Yes (builder default)
☐ Yes, including pre-measured thickening products
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q14. Will workers help clients walk with walkers, canes or wheelchairs?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Once the client's own training on the equipment is finished, after worker training and a competency check (245.40(c)(4)(B)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q15. Will workers apply prescription compression stockings or devices?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Needs an order from the client's prescribing health care professional, worker training and a competency check. Non-prescription support stockings are ordinary dressing help (245.40(c)(4)(D)).

☐ Yes
☐ No (builder default)

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q16. Will workers use a prescription shampoo?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Needs an order, training, a competency check and annual retraining (245.40(c)(4)(G)).

☐ Yes
☐ No (builder default)

What it changes:

- Changes the wording of 6 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do
  - Policy 5.6 Visit records, observation and reporting

Q17. Will workers file nails for clients with circulation problems or loss of sensation?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

For example clients with diabetes. Needs an order from the client's health care professional, training and a competency check. Workers never trim nails (245.40(c)(4)(I)).

☐ Yes
☐ No (builder default)

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q18. Will workers switch clients' oxygen from stationary to portable?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Needs training and a competency check, and a staff member trained to train and evaluate workers on it. All other respiratory care is skilled care (245.40(c)(4)(O)).

☐ Yes
☐ No (builder default)

What it changes:

- Changes the wording of 6 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 3.1 Job descriptions
  - Policy 4.1 Orientation, initial and annual training
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q19. Will workers remind clients to check blood pressure, heart rate, oxygen, temperature or weight?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

The agency never interprets readings or acts clinically on them (245.40(c)(4)(P)).

☐ Yes, and help apply the device and record the reading (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do
  - Policy 5.6 Visit records, observation and reporting

Q20. Will workers empty catheter and ostomy bags?

Only asked if Q9 is "Personal care, plus companion and homemaker services".

Emptying or changing external collection bags is allowed. Inserting or removing catheters, enemas, suppositories and digital stimulation are not (245.40(c)(4)(L)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do

Q21. Will workers remind clients to take their medication?

Only from containers filled by the client, a family member, a nurse or a pharmacist and marked with the day and time. Workers never set up medication (245.40(c)(4)(N); 245.40(c)(5)(D)).

☐ Yes, from pre-filled medication minders (builder default)
☐ No

What it changes:

- Policy 5.3 Medication reminding applies only when Q21 is "Yes, from pre-filled medication minders". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 7 policies:
  - Policy 2.1 Scope of services and fee schedule
  - Policy 2.2 Acceptance of clients
  - Policy 4.2 Competency evaluations and task skills checklists
  - Policy 5.1 Service plan
  - Policy 5.2 Home services tasks: what workers may and may not do
  - Policy 5.4 Alzheimer’s disease and related dementias services
  - Policy 5.6 Visit records, observation and reporting

Q22. Will you serve clients with Alzheimer's disease or another dementia?

Then Part 973 applies: an Alzheimer's services supervisor, a dementia care plan for each client with a diagnosis, disclosure materials at enrollment, and 6 hours of initial and 3 hours of annual dementia training (245.211; 973.130; 973.140).

☐ Yes (builder default)
☐ No

What it changes:

- Policy 5.4 Alzheimer's disease and related dementias services applies only when Q22 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 Agency manager, written alternate and organization chart
  - Policy 1.5 License application, renewal and notices to IDPH
  - Policy 2.1 Scope of services and fee schedule
  - Policy 2.2 Acceptance of clients
  - Policy 2.3 Client service contract and employer notice
  - Policy 3.1 Job descriptions
  - Policy 3.5 Health care worker background checks and registry
  - Policy 3.6 Personnel records
  - Policy 3.7 Annual performance evaluation
  - Policy 4.1 Orientation, initial and annual training
  - Policy 5.1 Service plan
  - Policy 5.5 Supervisory visits: clients and workers
  - Policy 9.1 Quality improvement program and record review
  - Policy 10.1 Client records
- Decides whether the builder asks Q27.
- Changes what the manual's cover page lists.

Builder step: How you'll operate

Q30. Will you have a branch office or drop site?

Extra locations within your service area, supervised by the parent office and approved by IDPH (245.80(k)).

☐ No (builder default)
☐ Yes

What it changes:

- Policy 1.8 Branch offices and drop sites applies only when Q30 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 4 policies:
  - Policy 1.2 Agency manager, written alternate and organization chart
  - Policy 1.7 Contracted services and student training agreements

    - Policy 4.1 Orientation, initial and annual training
    - Policy 9.1 Quality improvement program and record review
- Decides whether the builder asks Q31.

Q31. Which kind?

Only asked if Q30 is "Yes".

A drop site has no staff assigned, takes no referrals, does no payroll or billing, stores no files and is not advertised (245.80(k)(2)).

☐ A branch office (builder default)
☐ A drop site only
☐ Both

What it changes:

- Changes the wording of 5 policies:
    - Policy 1.2 Agency manager, written alternate and organization chart
    - Policy 1.7 Contracted services and student training agreements
    - Policy 1.8 Branch offices and drop sites
    - Policy 4.1 Orientation, initial and annual training
    - Policy 9.1 Quality improvement program and record review

Q32. Will any services be provided through a contract with another company?

Contracted services need a written agreement with the items in 245.210(b), and unlicensed contracted workers go through the fingerprint background check (955.135(a)).

☐ No, only our own employees (builder default)
☐ Yes

What it changes:

- Changes the wording of 8 policies:
    - Policy 1.2 Agency manager, written alternate and organization chart
    - Policy 1.7 Contracted services and student training agreements
    - Policy 2.1 Scope of services and fee schedule
    - Policy 2.3 Client service contract and employer notice
    - Policy 3.2 Personnel policies: pay, hours, leave and equal opportunity
    - Policy 3.3 Employee health evaluation and communicable disease
    - Policy 3.5 Health care worker background checks and registry
    - Policy 5.5 Supervisory visits: clients and workers

Q33. Will students from a school or college train with you?

Needs a written agreement with each educational institution (245.40(k)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of Policy 1.7 Contracted services and student training agreements.

Q34. Will you serve clients under 18?

Suspected abuse or neglect of a client under 18 is reported to the DCFS Child Abuse Hotline (245.250(a)(2)).

☐ Not usually (services are designed for adults) (builder default)
☐ Yes

What it changes:

- Changes the wording of 2 policies:
  - Policy 2.2 Acceptance of clients
  - Policy 6.1 Abuse, neglect and financial exploitation: reporting and investigation

Q35. How will you count each worker's year of annual training?

Every worker needs 10 hours of training each year; the agency picks the basis (245.71(f)).

☐ Calendar year (January to December) (builder default)
☐ Each worker's hire anniversary

What it changes:

- Changes the wording of Policy 4.1 Orientation, initial and annual training.

Q36. What will the new-hire health evaluation include?

Part 245 leaves the content to your governing body (245.30(c)(1)(B)), and IDPH reviews the policy with your application. Choose what you will always do for every new worker.

☐ A health questionnaire reviewed by the agency manager
☐ A health questionnaire and a tuberculosis (TB) screening test (builder default)
☐ A statement from a licensed health care provider and a TB screening test

What it changes:

- Changes the wording of Policy 3.3 Employee health evaluation and communicable disease.

Q37. Include recommended practices?

Some policies end with practical steps that go beyond the rules, such as an agency emergency plan and a client rights statement. Once adopted they are your policies and IDPH 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 37 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 2.3 Client service contract and employer notice
  - Policy 8.1 Emergencies, emergency notification and disaster procedures

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.

- Q3. Mailing address (pre-filled: Same as the office address)
- Q6. Operating hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q38. Days to finish investigating a complaint (pre-filled: 14)

PART 2

Part 2. Agency details

These 16 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, exactly as on your IDPH license application (form 445104), including LLC or Inc.

Example: Sample Home Care, LLC
Prints in: the cover page and 37 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q2. Office address

Required.

The street address of the office on your license. IDPH requires an office with a working phone staffed during business hours that meets local fire safety rules (245.40(a)(12)). Tell IDPH within 10 days of any change of address (245.80(h)).

Example: 100 Main Street, Suite 200, Springfield, IL 62701
Prints in: the cover page and 10 policies (including 1.1, 1.3, 1.4 and 1.5)

Answer: _____

Q3. Mailing address

Pre-filled if left blank.

Every client contract must give the agency's street address and mailing address (245.220(b)). Leave as it is if they are the same.

Example: PO Box 100, Springfield, IL 62705
If left blank, prints as: Same as the office address
Prints in: policies 2.3 and 2.4

Answer: _____

Q4. Office phone

Required.

Staffed during your business hours (245.40(a)(12)) and printed in every client contract (245.220(b)).

Format: a full phone number, with area code
Example: (217) 555-0100
Prints in: 13 policies (including 1.3, 2.1, 2.2 and 2.3)

Answer: _____

Q5. Phone for workers and clients outside office hours

Required.

A supervisor must be available to workers for questions at all times (245.40(c)(6)(A)), and clients must be told how to get care outside your operating hours (245.40(a)(13)).

Format: a full phone number, with area code
Example: (217) 555-0199
Prints in: 13 policies (including 1.3, 2.2, 2.3 and 2.4)

Answer: _____

Q6. Operating hours

Pre-filled if left blank.

Your written operating hours policy states these hours (245.40(a)(13)). Tell IDPH within 10 days if they change (245.80(h)).

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: 8 policies (including 1.3, 1.6, 2.1 and 2.2)

Answer: _____

Q7. Counties you serve

Required.

The geographic service area on your application. IDPH must approve any expansion or reduction before it happens (245.80(i)).

Format: one or more counties, picked from the builder's list
Example: Sangamon, Menard and Logan counties
Prints in: 9 policies (including 1.1, 1.4, 1.5 and 1.8)

Answer: _____

Q8. IDPH license number

Optional.

Leave blank if you are still applying: the manual and client contract show a space to write it in. The contract must state your license status (245.220(d)).

Example: 1234567
Prints in: policies 1.2, 1.5, 2.1, 2.3, 5.4 and 6.1

Answer: _____

Builder step: People and dates

Q23. Governing body

Required.

The person or group with legal authority and responsibility for the agency. It adopts your policies, reviews the bylaws every year, meets to review operations and keeps minutes (245.30(a)).

Example: the members of Sample Home Care, LLC
Prints in: the cover page and 14 policies (including 1.1, 1.2, 1.4 and 1.5)

Answer: _____

Q24. Agency manager

Required.

The person you designate to supervise services (245.30(f)(1)), with the duties in 245.40(a). Part 245 sets no qualifications for a home services agency manager; IDPH reviews the manager's experience on Attachment E with a first application.

Example: Jordan Lee
Prints in: the cover page and 37 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q25. Person who acts for the agency manager when they are absent

Required.

Designated in writing (245.40(a)(11)) and named in your license application (245.90(a)(3)(B)).

Example: Taylor Brooks
Prints in: the cover page and 15 policies (including 1.1, 1.2, 1.3 and 1.5)

Answer: _____

Q26. Supervisor of home services workers

Required.

Makes the supervisory visits and trains workers. Needs two years' experience in the last five doing home services tasks, or a current supervisor or trainer role plus training in the last year (245.71(g)). Can be the agency manager.

Example: Taylor Brooks
Prints in: the cover page and 31 policies (including 1.2, 1.3, 1.6 and 1.7)

Answer: _____

Q27. Alzheimer's services supervisor

Only asked, and then required, if Q22 is "Yes".

Oversees your dementia services. Needs a recognized dementia certification (such as CDP or EssentiALZ) or two years' dementia experience including one in management plus ability-centered care training, and 8 hours of dementia training a year (973.130(b); 973.140(b)). Can be the agency manager or supervisor.

Example: Taylor Brooks
Prints in: the cover page and policies 1.2, 3.1, 4.1, 5.1, 5.4 and 5.5

Answer: _____

Q28. Date you adopt the manual

Required.

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

Answer: _____

Q29. Next review date

Required.

Usually one year after you adopt the manual, in line with the yearly bylaws review and program evaluation (245.30(a)(1); 245.240(a)).

Format: a date
Example: November 1, 2027
Prints in: the cover page and policies 1.1 and 1.5

Answer: _____

Builder step: How you'll operate

Q38. Days to finish investigating a complaint

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Part 245 requires written complaint resolution policies (245.30(b)(3)) and a description of the process in every client contract (245.220(i)), but sets no number of days. IDPH 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: policies 2.3 and 2.4

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	Office address	100 Main Street, Suite 200, Springfield, IL 62701
Q3	Mailing address	PO Box 100, Springfield, IL 62705
Q4	Office phone	(217) 555-0100
Q5	Phone for workers and clients outside office hours	(217) 555-0199
Q6	Operating hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q7	Counties you serve	Sangamon, Menard and Logan counties
Q8	IDPH license number	1234567

Builder step: Services you offer

	Question	Sample answer
Q9	What services will you provide?	Personal care, plus companion and homemaker services
Q10	Will workers help clients bathe?	Yes
Q11	Will workers help with transfers?	Yes, including gait belts and adaptive equipment
Q12	Will workers help clients change position?	Yes, for clients who can signal when they need to move
Q13	Will workers help clients eat?	Yes
Q14	Will workers help clients walk with walkers, canes or wheelchairs?	Yes
Q15	Will workers apply prescription compression stockings or devices?	No
Q16	Will workers use a prescription shampoo?	No

	Question	Sample answer
Q17	Will workers file nails for clients with circulation problems or loss of sensation?	No
Q18	Will workers switch clients' oxygen from stationary to portable?	No
Q19	Will workers remind clients to check blood pressure, heart rate, oxygen, temperature or weight?	Yes, and help apply the device and record the reading
Q20	Will workers empty catheter and ostomy bags?	Yes
Q21	Will workers remind clients to take their medication?	Yes, from pre-filled medication minders
Q22	Will you serve clients with Alzheimer's disease or another dementia?	Yes

Builder step: People and dates

	Question	Sample answer
Q23	Governing body	the members of Sample Home Care, LLC
Q24	Agency manager	Jordan Lee
Q25	Person who acts for the agency manager when they are absent	Taylor Brooks
Q26	Supervisor of home services workers	Taylor Brooks
Q27	Alzheimer's services supervisor	Taylor Brooks
Q28	Date you adopt the manual	November 1, 2026
Q29	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q30	Will you have a branch office or drop site?	No
Q31	Which kind?	Not asked with these answers
Q32	Will any services be provided through a contract with another company?	No, only our own employees
Q33	Will students from a school or college train with you?	No
Q34	Will you serve clients under 18?	Not usually (services are designed for adults)

	Question	Sample answer
Q35	How will you count each worker's year of annual training?	Calendar year (January to December)
Q36	What will the new-hire health evaluation include?	A health questionnaire and a tuberculosis (TB) screening test
Q37	Include recommended practices?	Yes, include them
Q38	Days to finish investigating a complaint	14

What these answers do to the manual

- Policy 1.8 Branch offices and drop sites prints as "Not applicable", because it applies only when Q30 is "Yes".
- In 25 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.

Q22. Will you serve clients with Alzheimer's disease or another dementia?

In Policy 2.2 Acceptance of clients, the sample answer "Yes" prints:

> 3. the service plan has been established with the client (Policy 5.1) and, for a client with an Alzheimer's disease or related dementias diagnosis, the dementia services materials have been given and the plan includes the client's dementia care (Policies 5.4 and 5.1);
>
> `Policy 2.2 Acceptance of clients, sample answer`

The answer "No" prints this instead:

> 3. the service plan has been established with the client (Policy 5.1);
>
> `Policy 2.2 Acceptance of clients, other answer`

Q9. What services will you provide?

In Policy 3.1 Job descriptions, the sample answer "Personal care, plus companion and homemaker services" prints:

> 6. helping with activities of daily living and personal care, limited to the tasks in Policy 5.2 that the worker has been trained in and found competent to do (Policy 4.2);
>
> `Policy 3.1 Job descriptions, sample answer`

The answer "Companion and homemaker services only (no hands-on personal care)" prints this instead:

> 6. no help with activities of daily living such as bathing, dressing, eating, toileting or transfers, and no hands-on personal care: Sample Home Care, LLC provides companion and homemaker services only (Policy 5.2);
>
> `Policy 3.1 Job descriptions, other answer`

Q30. Will you have a branch office or drop site?

Policy 1.8 Branch offices and drop sites prints in full only when Q30 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC operates only from its licensed office and has no branch office or drop site. Before opening one, it will adopt this policy and get IDPH's approval under 77 Ill. Adm. Code 245.80(k).
>
> `Policy 1.8 Branch offices and drop sites, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 2.4, Complaint resolution, as it prints in the Illinois manual: https://www.carerulebook.com/samples/us-illinois-home-care.pdf