CARERULEBOOK INDIANA MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Indiana manual builder asks: 20 decisions and 16 details, 36 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/indiana/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 Indiana]) 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:

- Owner or officer who adopts the manual
- Manager
- Alternate manager
- Person who trains and evaluates workers

PART 1

Part 1. Decisions to settle first

These 20 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 and charges

Q8. Will you provide attendant care (hands-on personal care)?

Help getting in and out of beds, wheelchairs and vehicles, bathing and hygiene, using the toilet, dressing and grooming, eating, and help with medications (IC 16-18-2-28.5). Each task a worker does needs a competency evaluation first (IC 16-27-4-16).

☐ Yes (builder default)
☐ No

What it changes:

- Policy 2.2 Help with medications applies only when Q8 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Policy 2.3 Lift services applies only when Q16 is "Yes" and Q8 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 8 policies:
  - Policy 1.5 Compliance documentation
  - Policy 1.6 Manager’s responsibilities and job description
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 1.9 Client rights statement
  - Policy 2.1 Scope of services: what workers do and do not do
  - Policy 2.7 Client records and staff files
  - Policy 2.8 License renewal, changes, ownership disclosure and closing
- Decides whether the builder asks Q11, Q12, Q13, Q14, Q15, Q16 and Q17.

Q9. Will you provide homemaker services?

Housekeeping, shopping, laundry, meal planning and preparation, and cleaning (IC 16-27-4-4(a)(2)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q10. Will you provide companion services?

Fellowship, care and protection, including transportation, letter writing, mail reading and escort services (IC 16-27-4-4(a)(3)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q11. Will workers help clients get in and out of beds, wheelchairs and vehicles?

Only asked if Q8 is "Yes".

Adds transfers to the competency evaluation and skills test (IC 16-27-4-16).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q12. Will workers help with bathing and personal hygiene?

Only asked if Q8 is "Yes".

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q13. Will workers help clients use the toilet?

Only asked if Q8 is "Yes".

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q14. Will workers help with dressing and grooming?

Only asked if Q8 is "Yes".

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q15. Will workers help clients eat?

Only asked if Q8 is "Yes".

Feeding, including preparation and cleanup (IC 16-18-2-28.5(b)(2)(D)). Making meals without help eating is a homemaker service.

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do

Q16. Will workers use lift equipment, such as a Hoyer lift, to move clients?

Only asked if Q8 is "Yes".

Lift services need liability insurance that covers them (IC 16-27-4-6(l)) and training on lifts in general and on each client's own lift at the client's home, following the manufacturer's instructions (IC 16-27-4-16(c)). A client may always decline the lift (IC 16-27-4-12.5).

☐ No (builder default)
☐ Yes

What it changes:

- Policy 2.3 Lift services applies only when Q16 is "Yes" and Q8 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 8 policies:
  - Policy 1.5 Compliance documentation
  - Policy 1.6 Manager’s responsibilities and job description
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 1.9 Client rights statement
  - Policy 2.1 Scope of services: what workers do and do not do
  - Policy 2.7 Client records and staff files
  - Policy 2.8 License renewal, changes, ownership disclosure and closing

Q17. How will workers help clients with medications?

Only asked if Q8 is "Yes".

In Indiana, medication help is part of attendant care, for a client who directs it or whose help is directed by someone who may consent to health care for them (IC 16-18-2-28.5(b)(3)). Anything that needs a health care professional's order is not a personal service (IC 16-27-4-4(b)(4)).

☐ They will not help with medications
☐ Reminders or cues to take medication only (builder default)
☐ Reminders, opening preset containers, and help handling or taking medications

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.7 Evaluation and training
  - Policy 1.8 Service plan and visit record
  - Policy 2.1 Scope of services: what workers do and do not do
  - Policy 2.2 Help with medications

Q18. Will you serve clients under 18?

The service plan and rights statement then go to a parent or guardian as the child's personal representative. Anyone who believes a child is a victim of abuse or neglect must report it (IC 31-33-5-1).

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

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.2 Client satisfaction review
  - Policy 1.8 Service plan and visit record
  - Policy 1.9 Client rights statement
  - Policy 2.5 Reporting abuse, neglect and exploitation of adults and children
  - Policy 2.7 Client records and staff files

Builder step: How you'll operate

Q27. Who answers client calls when the office is closed?

The manager or the manager's designee must be available to respond to client calls 24 hours a day (IC 16-27-4-14). Designees are named in writing (IC 16-27-4-9(b)).

☐ The manager, or the alternate manager when the manager is unavailable (builder default)
☐ The manager and staff designated in writing, on a schedule

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.6 Manager’s responsibilities and job description
  - Policy 1.9 Client rights statement

Q28. How will you hold client satisfaction reviews?

The manager or a designee reviews services with each client every 76 to 104 days, in person or by telephone, and the review is written, signed and dated (IC 16-27-4-11).

☐ In person or by phone, whichever suits the client (builder default)
☐ In person
☐ By phone

What it changes:

- Changes the wording of Policy 1.2 Client satisfaction review.

Q29. What score must workers reach on the written and skills tests?

The agency decides whether a worker is competent (IC 16-27-4-16(a)). IDOH's application form gives 80% as an example and its 2022 instruction letter gives 85%. A worker below the mark is trained and evaluated again (IC 16-27-4-16(b)).

☐ 80% (builder default)
☐ 85%
☐ 90%

What it changes:

- Changes the wording of Policy 1.7 Evaluation and training.

Q30. Which tuberculosis (TB) test will workers take?

Indiana applies the home health TB rule to every worker with direct client contact (IC 16-27-4-15; 410 IAC 17-12-1(i)). The rule accepts either test.

☐ A skin test or a blood test, whichever the worker's clinic offers (builder default)
☐ A two-step skin test (Mantoux) at hire, then a skin test every year
☐ A blood test (QuantiFERON) at hire and every year

What it changes:

- Changes the wording of Policy 1.4 Tuberculosis test (control of communicable disease).

Q31. Which criminal history check will you get for workers?

The agency applies for one of these within 3 business days after a worker starts visiting clients' homes, and may not keep them on home visits past 21 days without the result (IC 16-27-2-4; IC 16-27-2-5(c)). An expanded check must include every search in IC 20-26-2-1.5.

☐ A national check or an expanded check, chosen for each worker (builder default)
☐ A national check (fingerprints, through the Indiana State Police)
☐ An expanded check from a background check company

What it changes:

- Changes the wording of Policy 2.4 Criminal history checks for owners, managers and workers.

Q32. Who pays for workers' criminal history checks?

The agency is responsible for the fees but may have applicants pay them when they apply, or reimburse the agency (IC 16-27-2-6).

☐ The agency (builder default)
☐ The applicant pays when they apply
☐ The applicant pays the agency back

What it changes:

- Changes the wording of Policy 2.4 Criminal history checks for owners, managers and workers.

Q33. How will you keep records?

Records must be kept, or be electronically accessible, at your Indiana office for at least 7 years (IC 16-27-4-18). IDOH asks the policy to say how long, where and how records are stored.

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

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.5 Compliance documentation
  - Policy 2.7 Client records and staff files

Q34. Will you have a branch office?

A branch operates under your license. It must provide services, be owned and controlled by your agency and be within 120 miles of your licensed office (IC 16-27-4-6(b)). IDOH asks for a letter and a map.

☐ No (builder default)
☐ Yes

What it changes:

- Policy 2.9 Branch offices applies only when Q34 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 3 policies:
  - Policy 1.5 Compliance documentation
  - Policy 1.6 Manager’s responsibilities and job description
  - Policy 2.8 License renewal, changes, ownership disclosure and closing

Q35. Include recommended practices?

Some policies end with practical steps that go beyond the law, such as keeping TB results in a confidential file and a list of tasks workers never do. Once adopted they are your policies and IDOH can expect you to follow them, so leave them out if you won't. The IDOH upload set always leaves them out, because IDOH asks applicants not to send anything that is not required.

☐ Yes, include them (builder default)
☐ No, only what the law requires

What it changes:

- Keeps or removes the "Recommended practice" section at the end of 18 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 Policy 1.8 Service plan and visit record.

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 hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q20. Days' written notice before a price increase (pre-filled: 30)
- Q36. 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.

Exactly as on your Indiana Secretary of State document and your license application, including LLC or Inc., and not abbreviated: IDOH asks for the same name on every policy and form. IDOH's instruction letter says a personal services agency may not use "health" or "nursing" in its name.

Example: Sample Home Care, LLC
Prints in: the cover page and 18 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q2. Office address in Indiana

Required.

Your agency's physical location in Indiana. IDOH's instruction letter says it may be a home or residential address. Records must be kept, or be electronically accessible, at an Indiana office for at least 7 years (IC 16-27-4-18).

Example: 100 Main Street, Suite 200, Indianapolis, IN 46204
Prints in: the cover page and 9 policies (including 1.3, 1.4, 1.5 and 1.6)

Answer: _____

Q3. Office phone

Required.

Printed in the client rights statement as the number to call to make a complaint to the agency (IC 16-27-4-12(11)).

Format: a full phone number, with area code
Example: (317) 555-0100
Prints in: 10 policies (including 1.1, 1.3, 1.6 and 1.7)

Answer: _____

Q4. Phone clients call when the office is closed

Required.

The manager or a designee must be available to respond to client calls 24 hours a day (IC 16-27-4-14), and the client rights statement says how to reach them while the office is open or closed (IC 16-27-4-12(10)). It can be the office number if calls are forwarded.

Format: a full phone number, with area code
Example: (317) 555-0199
Prints in: the cover page and 10 policies (including 1.1, 1.3, 1.6 and 1.7)

Answer: _____

Q5. Office hours

Pre-filled if left blank.

The hours your office is open for business, printed in the client rights statement (IC 16-27-4-12(8)). IDOH asks to be told when they change.

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 1.1, 1.6, 1.9, 2.1, 2.5 and 2.8

Answer: _____

Q6. Counties you serve

Required.

Where you provide services. Indiana's license covers the whole state; any branch office must be within 120 miles of your licensed office (IC 16-27-4-6(b)).

Format: one or more counties, picked from the builder's list
Example: Marion, Hamilton and Hendricks counties
Prints in: policy 2.6

Answer: _____

Q7. IDOH license number

Optional.

Leave blank if you are still applying: the manual shows a space to write it in. IDOH asks for it when you report changes.

Example: PSA-012345
Prints in: policies 2.8 and 2.9

Answer: _____

Builder step: Services and charges

Q19. Your charges

Required.

Write it the way a client would read it. The client rights statement must give your charges for services (IC 16-27-4-12(6)). These are your prices, not a state fee.

Example: $30.00 per hour for all services, with a 3-hour minimum visit
Prints in: policies 1.9 and 2.1

Answer: _____

Q20. Days' written notice before a price increase

Pre-filled if left blank.

No law sets this number. Choose one you can always meet. The client rights statement must give your policy for telling clients about any increase in the cost of services (IC 16-27-4-12(7)).

Format: a whole number of up to three digits
Example: 30
If left blank, prints as: 30
Prints in: policies 1.9 and 2.1

Answer: _____

Builder step: People and dates

Q21. Owner or officer who adopts the manual

Required.

The owner, CEO or president who signs the license application with the manager. Owners of 5% or more and officers each need a criminal history report with the application (IC 16-27-2-3; IC 16-27-4-17).

Example: Morgan Ellis, Managing Member
Prints in: the cover page and 8 policies (including 1.3, 1.6, 2.4 and 2.5)

Answer: _____

Q22. Manager

Required.

The person the agency employs to run it day to day (IC 16-27-4-9(a)). Indiana sets no qualifications for the manager. IDOH's directory calls this person the administrator.

Example: Jordan Lee
Prints in: the cover page and 18 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q23. Alternate manager

Required.

IDOH's application asks for an alternate manager, and the manager may designate in writing one or more people to act for them (IC 16-27-4-9(b)). The alternate also needs a criminal history report dated within 3 months with the application.

Example: Taylor Brooks
Prints in: the cover page and 13 policies (including 1.1, 1.3, 1.4 and 1.5)

Answer: _____

Q24. Person who trains and evaluates workers

Required.

IDOH's training questions ask who will train workers and sign the training records (application form, policies item 7). It can be the manager.

Example: Jordan Lee, Manager
Prints in: 10 policies (including 1.1, 1.4, 1.6 and 1.7)

Answer: _____

Q25. Date you adopt the manual

Required.

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

Answer: _____

Q26. Next review date

Required.

Usually one year after you adopt the manual, before your yearly license renewal.

Format: a date
Example: November 1, 2027
Prints in: the cover page and policies 1.5, 1.6, 2.1, 2.7 and 2.8

Answer: _____

Builder step: How you'll operate

Q36. Days to finish investigating a complaint

Pre-filled if left blank.

No law sets this number. Choose one you can always meet. The agency must investigate complaints about services and about respect for clients' property, and document each complaint and its resolution (IC 16-27-4-13). IDOH 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 1.3 and 1.9

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 in Indiana	100 Main Street, Suite 200, Indianapolis, IN 46204
Q3	Office phone	(317) 555-0100
Q4	Phone clients call when the office is closed	(317) 555-0199
Q5	Office hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q6	Counties you serve	Marion, Hamilton and Hendricks counties
Q7	IDOH license number	PSA-012345

Builder step: Services and charges

	Question	Sample answer
Q8	Will you provide attendant care (hands-on personal care)?	Yes
Q9	Will you provide homemaker services?	Yes
Q10	Will you provide companion services?	Yes
Q11	Will workers help clients get in and out of beds, wheelchairs and vehicles?	Yes
Q12	Will workers help with bathing and personal hygiene?	Yes
Q13	Will workers help clients use the toilet?	Yes
Q14	Will workers help with dressing and grooming?	Yes
Q15	Will workers help clients eat?	Yes
Q16	Will workers use lift equipment, such as a Hoyer lift, to move clients?	No
Q17	How will workers help clients with medications?	Reminders or cues to take medication only

	Question	Sample answer
Q18	Will you serve clients under 18?	Not usually (services are designed for adults)
Q19	Your charges	$30.00 per hour for all services, with a 3-hour minimum visit
Q20	Days' written notice before a price increase	30

Builder step: People and dates

	Question	Sample answer
Q21	Owner or officer who adopts the manual	Morgan Ellis, Managing Member
Q22	Manager	Jordan Lee
Q23	Alternate manager	Taylor Brooks
Q24	Person who trains and evaluates workers	Jordan Lee, Manager
Q25	Date you adopt the manual	November 1, 2026
Q26	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q27	Who answers client calls when the office is closed?	The manager, or the alternate manager when the manager is unavailable
Q28	How will you hold client satisfaction reviews?	In person or by phone, whichever suits the client
Q29	What score must workers reach on the written and skills tests?	80%
Q30	Which tuberculosis (TB) test will workers take?	A skin test or a blood test, whichever the worker's clinic offers
Q31	Which criminal history check will you get for workers?	A national check or an expanded check, chosen for each worker
Q32	Who pays for workers' criminal history checks?	The agency
Q33	How will you keep records?	Partly on paper and partly electronically
Q34	Will you have a branch office?	No
Q35	Include recommended practices?	Yes, include them
Q36	Days to finish investigating a complaint	14

What these answers do to the manual

- Policy 2.3 Lift services prints as "Not applicable", because it applies only when Q16 is "Yes" and Q8 is "Yes".
- Policy 2.9 Branch offices prints as "Not applicable", because it applies only when Q34 is "Yes".
- In 13 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.

Q18. Will you serve clients under 18?

In Policy 2.5 Reporting abuse, neglect and exploitation of adults and children, the sample answer "Not usually (services are designed for adults)" prints:

> Sample Home Care, LLC's services are designed for adults, but staff may meet children in clients' homes. The duty to report applies to every child, not only clients.
>
> `Policy 2.5 Reporting abuse, neglect and exploitation of adults and children, sample answer`

The answer "Yes" prints this instead:

> Sample Home Care, LLC serves clients under 18. A concern about a client under 18 is reported to the Department of Child Services (DCS), as item 7 sets out.
>
> `Policy 2.5 Reporting abuse, neglect and exploitation of adults and children, other answer`

Q17. How will workers help clients with medications?

In Policy 2.2 Help with medications, the sample answer "Reminders or cues to take medication only" prints:

> To set out how Sample Home Care, LLC's workers give clients reminders or cues to take their medication, who may direct that help, and its limits. In Indiana, help with medications is part of attendant care (IC 16-18-2-28.5(b)(3)). Sample Home Care, LLC offers only the first part of it: reminders or cues.
>
> `Policy 2.2 Help with medications, sample answer`

The answer "They will not help with medications" prints this instead:

> To record that Sample Home Care, LLC's workers do not help clients with medications, and what they do when a client or family asks for that help.
>
> `Policy 2.2 Help with medications, other answer`

Q8. Will you provide attendant care (hands-on personal care)?

Policy 2.2 Help with medications prints in full only when Q8 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC does not provide attendant care, which is where help with medications belongs under IC 16-18-2-28.5(b)(3), so its workers do not remind clients to take medication or help them take it. If this changes, the agency will adopt this policy and evaluate each worker on the task first (IC 16-27-4-16).
>
> `Policy 2.2 Help with medications, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 1.9, Client rights statement, as it prints in the Indiana manual: https://www.carerulebook.com/samples/us-indiana-home-care.pdf