CARERULEBOOK OKLAHOMA MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Oklahoma manual builder asks: 18 decisions and 30 details, 48 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/oklahoma/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

- Administrator
- Supervising registered nurse
- Alternate (registered nurse or physician)
- Registered nurse employed by the agency who writes the caregiver training plan
- Registered nurse who supervises in-service training for certified aides

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PART 1

Part 1. Decisions to settle first

These 18 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. Are you applying, or already licensed?

Already licensed? Policy 1.1 then ends with a What changed checklist: the changes to Oklahoma's home care rules and statutes since 2021 that an earlier manual may not reflect, including the amendment in force since August 11, 2025, each with the policy that answers it.

☐ Applying for a new license (builder default)
☐ Already licensed

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.2 License, governing body, ownership, office, branches, changes and renewal
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.7 Financial resources, annual budget and insurance
  - Policy 1.10 Inspections, complaint investigations and plans of correction

Q2. Will you have branch offices?

A branch serves part of the parent agency's area under the same name and may be licensed as part of the parent agency. An office too far away to share administration and supervision every day is a subunit, licensed separately (OAC 310:662-1-2).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.2 License, governing body, ownership, office, branches, changes and renewal
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.4 Administrator: certificate, duties, posting and continuing education
- Decides whether the builder asks Q6.

Builder step: Services and clients

Q15. Will caregivers also help with household tasks, shopping, meals, transportation or companionship?

These are companion or sitter services (63 O.S. 1-1972(A)). A licensed home care agency may provide them under its license if it meets section 1-1972, which adds a designated supervisor and daily records of the duties performed. Policy 3.12 covers them.

☐ Yes (builder default)
☐ No, personal care only

What it changes:

- Policy 3.12 Companion and sitter services applies only when Q15 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 16 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.9 Quality assessment and improvement
  - Policy 2.3 Job descriptions and qualifications
  - Policy 2.5 Orientation, in-service training and the RN training plan
  - Policy 2.6 Performance evaluations and disciplinary action
  - Policy 3.1 Client rights and responsibilities, and client autonomy
  - Policy 3.2 Service agreement, unit charges and billing
  - Policy 3.4 Accepting clients and the initial in-home assessment
  - Policy 3.5 Plan of care
  - Policy 3.6 What caregivers do and do not do: the task list and medication reminders
  - Policy 3.7 Supervision of care and supervisory home visits
  - Policy 3.9 Client records and retention
  - Policy 4.1 Infection control, infectious waste and sharps

    - Policy 4.2 Home safety assessment and injury prevention teaching
    - Policy 4.3 Medical emergencies in the home
- Decides whether the builder asks Q16 and Q21.

Q16. Will caregivers drive clients?

Only asked if Q15 is "Yes".

Transportation is a companion service (63 O.S. 1-1972(A)(1)). Oklahoma's home care rules set no driving requirements, so the steps the manual adds are your agency's choices.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 7 policies:
    - Policy 1.3 Plan of delivery: the scope and range of our services
    - Policy 1.7 Financial resources, annual budget and insurance
    - Policy 2.3 Job descriptions and qualifications
    - Policy 3.1 Client rights and responsibilities, and client autonomy
    - Policy 3.4 Accepting clients and the initial in-home assessment
    - Policy 3.6 What caregivers do and do not do: the task list and medication reminders
    - Policy 3.12 Companion and sitter services

Q17. Will caregivers remind clients to take their medication?

Oklahoma's home care rules say nothing about medication help by caregivers. This manual covers reminders only: no opening containers, filling pill organizers or giving medication. We will add more only if OSDH confirms what caregivers may do.

☐ Yes, reminders only (builder default)
☐ No

What it changes:

- Changes the wording of 10 policies:
    - Policy 1.3 Plan of delivery: the scope and range of our services
    - Policy 2.3 Job descriptions and qualifications
    - Policy 2.5 Orientation, in-service training and the RN training plan
    - Policy 3.1 Client rights and responsibilities, and client autonomy
    - Policy 3.4 Accepting clients and the initial in-home assessment
    - Policy 3.5 Plan of care
    - Policy 3.6 What caregivers do and do not do: the task list and medication reminders
    - Policy 3.9 Client records and retention

- Policy 3.12 Companion and sitter services
- Policy 4.3 Medical emergencies in the home

Q18. Will any client's personal care be provided under a physician's or practitioner's order?

Personal care needs no provider's order (63 O.S. 1-1964(8)). If care is provided under an order, the client record must also hold the prescriber's details, signed clinical notes, orders sent for signature within 10 days and a discharge summary (OAC 310:662-3-5(e)).

☐ No (builder default)
☐ Yes, for some clients

What it changes:

- Changes the wording of 6 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.9 Quality assessment and improvement
  - Policy 3.4 Accepting clients and the initial in-home assessment
  - Policy 3.8 Coordinating care, transfers and ending services
  - Policy 3.9 Client records and retention

Q19. Will you serve clients under 18?

Everyone must report suspected child abuse or neglect immediately, whoever the client is (10A O.S. 1-2-101). Serving children adds consent by a parent or guardian to the client policies.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 6 policies:
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 3.1 Client rights and responsibilities, and client autonomy
  - Policy 3.4 Accepting clients and the initial in-home assessment
  - Policy 3.9 Client records and retention
  - Policy 3.10 Confidentiality and release of client information
  - Policy 3.11 Reporting abuse, neglect and exploitation

Q20. Will you use contract staff or another provider for any home care services?

Contracted services need a written agreement with five set contents, and verification of the contractor's staff licenses or certifications kept at the agency (OAC 310:662-3-4(g)).

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

What it changes:

- Policy 1.8 Contracted 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 6 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.9 Quality assessment and improvement
  - Policy 3.7 Supervision of care and supervisory home visits
  - Policy 3.8 Coordinating care, transfers and ending services
  - Policy 3.9 Client records and retention

Builder step: Administrator, nurses and caregivers

Q25. Who will give hands-on personal care?

A home health aide must be certified and on OSDH's registry within four months (63 O.S. 1-1962(C)(1)), and CNAs count. Since 2021 a caregiver employed only for personal care may instead be trained continuously by a registered nurse, show competency in a written training plan by a registered nurse employed by the agency, and be supervised by a registered nurse on site at least every three months (1-1962(D)(9)).

☐ Certified home health aides or CNAs, and caregivers trained by our registered nurse (builder default)
☐ Only certified home health aides and certified nurse aides (CNAs)
☐ Only caregivers trained by our registered nurse

What it changes:

- Changes the wording of 21 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.5 Supervising registered nurse and alternate
  - Policy 1.9 Quality assessment and improvement
  - Policy 2.1 Employment procedures
  - Policy 2.2 Background checks through OK-SCREEN
  - Policy 2.3 Job descriptions and qualifications
  - Policy 2.4 Who may give personal care: certified aides, CNAs and RN-trained caregivers

    - Policy 2.5 Orientation, in-service training and the RN training plan
    - Policy 2.6 Performance evaluations and disciplinary action
    - Policy 2.8 Personnel records
    - Policy 3.1 Client rights and responsibilities, and client autonomy
    - Policy 3.4 Accepting clients and the initial in-home assessment
    - Policy 3.5 Plan of care
    - Policy 3.6 What caregivers do and do not do: the task list and medication reminders
    - Policy 3.7 Supervision of care and supervisory home visits
    - Policy 3.8 Coordinating care, transfers and ending services
    - Policy 3.11 Reporting abuse, neglect and exploitation
    - Policy 4.1 Infection control, infectious waste and sharps
    - Policy 4.2 Home safety assessment and injury prevention teaching
    - Policy 4.3 Medical emergencies in the home
- Decides whether the builder asks Q27, Q28, Q29, Q34 and Q35.

Q26. How will your supervising registered nurse work for you?

Either is allowed for an agency providing personal care only (OAC 310:662-3-4(d)). If your nurse is contracted and you use caregivers trained under the exemption, the training plan must be written by a registered nurse employed by the agency (63 O.S. 1-1962(D)(9)(e)), so the builder asks who that is.

☐ As an employee (builder default)
☐ Under a written contract

What it changes:

- Changes the wording of 5 policies:
    - Policy 1.3 Plan of delivery: the scope and range of our services
    - Policy 1.5 Supervising registered nurse and alternate
    - Policy 2.3 Job descriptions and qualifications
    - Policy 2.4 Who may give personal care: certified aides, CNAs and RN-trained caregivers
    - Policy 2.5 Orientation, in-service training and the RN training plan
- Decides whether the builder asks Q34.

Q27. Does your supervising nurse have at least two years of nursing experience, at least one of them in home care?

Only asked if Q25 is not "Only caregivers trained by our registered nurse".

In-service education for certified home care aides is generally supervised by a registered nurse with that experience (OAC 310:677-9-1(a)(2)). If not, name another registered nurse who has it.

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 2 policies:
  - Policy 2.3 Job descriptions and qualifications
  - Policy 2.5 Orientation, in-service training and the RN training plan
- Decides whether the builder asks Q35.

Q28. Who will make the supervisory home visits for clients cared for by certified aides and CNAs?

Only asked if Q25 is not "Only caregivers trained by our registered nurse".

When only aide or personal care services are provided, the rule says "a physician or a licensed nurse" makes the supervisory visit (OAC 310:662-5-3(g)(3)). Our reading is that an LPN qualifies; OSDH has not said. Visits for caregivers trained under the exemption are always by a registered nurse (63 O.S. 1-1962(D)(9)(d)).

☐ A registered nurse (builder default)
☐ A registered nurse or a licensed practical nurse

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.5 Supervising registered nurse and alternate
  - Policy 2.3 Job descriptions and qualifications
  - Policy 3.7 Supervision of care and supervisory home visits

Q29. How often will a nurse visit each client's home to supervise care by certified aides and CNAs?

Only asked if Q25 is not "Only caregivers trained by our registered nurse".

The rule sets at least once every six months, increased when the client's condition requires (OAC 310:662-5-3(g)(3)). Every three months goes beyond the rule and becomes your own commitment. Clients cared for by caregivers trained under the exemption get a registered nurse visit at least every three months either way.

☐ At least every six months (the rule's minimum), more often when the client's condition needs it (builder default)
☐ At least every three months, more often when the client's condition needs it

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 1.9 Quality assessment and improvement
  - Policy 3.7 Supervision of care and supervisory home visits

Q30. Will new hires ever work before OSDH's background check result arrives?

The law allows up to 60 days of provisional employment with a signed statement, the check requested on hiring and direct on-site supervision throughout (63 O.S. 1-1947(L)). In home care that means a supervisor present during care, so most agencies wait for the result.

☐ No, never (builder default)
☐ Yes, under the conditional employment rules

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 2.1 Employment procedures
  - Policy 2.2 Background checks through OK-SCREEN

Builder step: How you'll operate

Q36. Which TB test will you use for new staff?

Health screening for staff with direct client contact includes TB testing in conformance with the Tuberculosis Controllers Association and CDC 2019 guidelines (OAC 310:662-3-4(e)(6)).

☐ Either a blood test or a skin test (builder default)
☐ A blood test (IGRA)
☐ A tuberculin skin test

What it changes:

- Changes the wording of Policy 2.7 Health screening, TB testing and the annual influenza program.

Q37. How will you offer the flu vaccine?

The vaccine is offered at no charge to all employees and workers, or proof of current-season vaccination from another source is accepted (OAC 310:662-3-4(e)(7)(A)). Since August 11, 2025 the offer no longer has to be onsite.

☐ At a pharmacy or clinic, paid by the agency (builder default)
☐ At a clinic held at our office

What it changes:

- Changes the wording of Policy 2.7 Health screening, TB testing and the annual influenza program.

Q38. How will you keep client and staff records?

Client records are stored in a locked area and only authorized personnel have access (OAC 310:662-3-5(a)). For electronic records the manual applies the same rule to logins and devices.

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

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.3 Plan of delivery: the scope and range of our services
  - Policy 3.9 Client records and retention
  - Policy 3.10 Confidentiality and release of client information
  - Policy 3.12 Companion and sitter services

Q39. Include recommended practices?

Some policies end with steps that go beyond Oklahoma's rules, such as an incident log, notice before ending services or a closure checklist. Once adopted they are your policies and OSDH 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 32 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 6 policies:
  - Policy 1.1 This manual: adoption, review, legal compliance and the Chapter 662 crosswalk
  - Policy 1.2 License, governing body, ownership, office, branches, changes and renewal
  - Policy 1.9 Quality assessment and improvement
  - Policy 2.4 Who may give personal care: certified aides, CNAs and RN-trained caregivers
  - Policy 2.8 Personnel records
  - Policy 3.9 Client records and retention

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.

- Q14. Month of the governing body's yearly review of the agency (pre-filled: January)
- Q22. How clients pay for services (pre-filled: Private pay)
- Q41. Month of the yearly flu program evaluation (pre-filled: May)
- Q42. Client records reviewed each quarter (pre-filled: 10 percent of active client records, and at least 5)
- Q43. Months of the quarterly quality report (pre-filled: January, April, July and October)
- Q44. Days to give a written answer to a client's grievance (pre-filled: 10)

PART 2

Part 2. Agency details

These 30 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q3. Agency legal name

Required.

Exactly as on Form 757 (item 3, Entity): OSDH issues the license in this name and asks for proof that it matches your Oklahoma Secretary of State registration.

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

Answer: _____

Q4. Trade name (d.b.a.), if different

Optional.

OSDH asks for a copy of the Secretary of State Trade Name Report with the application and each renewal. Only a licensed agency may use the titles "home care agency", "home health agency" or "senior care agency" (63 O.S. 1-1972(E)).

Example: Sample Home Care
Prints in: the cover page

Answer: _____

Q5. Office address

Required.

The agency operates from a place of business in Oklahoma that is accessible to the public, and staff are supervised from it (OAC 310:662-2-1(a)). OSDH's Form 757 instructions say an agency cannot be located in a home. The license covers only the premises named in the application (2-1(g)(5)).

Example: 100 Main Street, Suite 200, Oklahoma City, OK 73102
Prints in: the cover page and 9 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q6. Branch office addresses and phone numbers

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

Form 757 asks for each branch's address and phone number (item 11), and a branch costs $25 on application and each renewal (state fee, 2-1(d)(3)). A branch operates under the parent agency's name (OAC 310:662-1-2).

Example: 25 Elm Street, Tulsa, OK 74103, (918) 555-0100
Prints in: policies 1.2, 1.3 and 1.4

Answer: _____

Q7. Office phone

Required.

Format: a full phone number, with area code
Example: (405) 555-0100
Prints in: 13 policies (including 1.1, 1.3, 1.5 and 3.1)

Answer: _____

Q8. After-hours phone number

Required.

Form 757 asks for an after-hours number, which must be answered outside business hours (instructions, item 7). The manual uses it for clients, caregivers and the on-call nurse.

Format: a full phone number, with area code
Example: (405) 555-0199
Prints in: the cover page and 11 policies (including 1.1, 1.2, 1.3 and 1.5)

Answer: _____

Q9. Agency email address

Required.

Form 757 asks for the email address where OSDH should send correspondence (item 6).

Example: office@samplehomecare.com
Prints in: policies 1.3 and 3.3

Answer: _____

Q10. Office hours

Required.

As listed on Form 757 (item 7, Agency Office Hours).

Format: days and times
Example: Monday to Friday, 8:00 a.m. to 5:00 p.m.
Prints in: 10 policies (including 1.1, 1.2, 1.3 and 1.5)

Answer: _____

Q11. Counties you serve

Required.

As marked on Form 757 (item 8, Geographic Area). If you serve only part of a county, say which cities.

Example: Oklahoma, Cleveland and Canadian counties
Prints in: the cover page and policies 1.3, 3.4 and 3.8

Answer: _____

Q12. OSDH license number

Optional.

Leave blank if you are still applying: the manual prints [OSDH license number] wherever the number goes, for you to replace once OSDH issues your license.

Example: HC0000
Prints in: policies 1.1, 1.2 and 1.3

Answer: _____

Q13. Governing body

Required.

The person or people with ultimate responsibility, including fiscal and legal authority, for the agency (OAC 310:662-1-2). The governing body is legally responsible for the agency, appoints the administrator, adopts the standards of practice and approves the quality program (3-3(a), 3-4(a), (c), 5-4(a)).

Example: Sample Home Care, LLC, through its members Morgan Ellis and Riley Chen
Prints in: the cover page and 10 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q14. Month of the governing body's yearly review of the agency

Pre-filled if left blank.

The rule says the governing body is responsible for periodic evaluations of the agency but sets no interval. A yearly review is our suggestion, and the month you choose becomes your policy. The governing body shall be responsible for periodic administrative and professional evaluations of the agency (OAC 310:662-3-4(a)).

Example: January
If left blank, prints as: January
Prints in: 7 policies (including 1.1, 1.2, 1.9 and 2.2)

Answer: _____

Builder step: Services and clients

Q21. Person who supervises companion services

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

It can be your administrator or your supervising nurse. A nurse is not required for companion services. A home care agency may provide companion or sitter services under its license if it meets 63 O.S. 1-1972, which calls for an individual designated to supervise those services (1-1972(B)(1), (H)).

Example: Jordan Lee
Prints in: policies 1.3, 2.3, 2.5, 2.6, 3.1 and 3.12

Answer: _____

Q22. How clients pay for services

Pre-filled if left blank.

This manual covers the licensing rules. Serving Medicaid ADvantage waiver members also needs ADvantage certification and a SoonerCare contract, with program rules this manual does not cover. Printed in the plan of delivery and the client service agreement.

Example: Private pay and long-term care insurance
If left blank, prints as: Private pay
Prints in: policies 1.3, 1.7, 3.1 and 3.2

Answer: _____

Q23. Your charges (unit charges)

Required.

Write it the way a client would read it. The client rights statement describes available services, unit charges and the billing process, and unit charges are disclosed even when a third party pays (OAC 310:662-3-2(b)(1)). These are your prices, not a state fee.

Example: $32.00 per hour, with a 2-hour minimum visit
Prints in: policies 3.1 and 3.2

Answer: _____

Q24. Billing method, payment options and due dates

Required.

Part of the billing process the rights statement describes (OAC 310:662-3-2(b)(1)). Changes in fees or billing go to the client orally and in writing as soon as possible, and no later than 30 calendar days after the agency becomes aware of the change.

Example: Invoiced every two weeks; due within 14 days by card or bank transfer
Prints in: policies 3.1 and 3.2

Answer: _____

Builder step: Administrator, nurses and caregivers

Q31. Administrator

Required.

The administrator must hold an OSDH home care administrator certificate: acting without one is a misdemeanor (63 O.S. 1-1962a(D)). An administrator may serve no more than two agencies or subunits at once (OAC 310:664-1-3(c)).

Example: Jordan Lee
Prints in: the cover page and 16 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q32. Supervising registered nurse

Required.

An agency providing personal care only must employ or contract with a supervising physician or registered nurse, available to advise caregivers whenever personal care is provided; on-call cover is allowed (OAC 310:662-3-4(d)). The manual is written for a registered nurse, because the plan of care must be reviewed by a registered nurse at least every six months (5-2(a)). OSDH asks for a copy of the nurse's license with the application.

Example: Avery Quinn, RN
Prints in: the cover page and 19 policies (including 1.1, 1.3, 1.5 and 1.8)

Answer: _____

Q33. Alternate (registered nurse or physician)

Required.

A physician or a qualified registered nurse alternate must be designated in writing to serve when the supervising registered nurse is away (OAC 310:662-3-4(d)). OSDH asks for a copy of the alternate's license too.

Example: Casey Morgan, RN
Prints in: the cover page and policies 1.3, 1.5, 3.1, 3.4, 3.5 and 3.6

Answer: _____

Q34. Registered nurse employed by the agency who writes the caregiver training plan

Only asked, and then required, if Q26 is "Under a written contract" and Q25 is not "Only certified home health aides and certified nurse aides (CNAs)".

This can be a part-time employee. If your contracted supervising nurse will become your employee, choose "As an employee" above instead. A caregiver who is not a certified aide or CNA works under the Act's exemption only if they have shown competency in a written training plan "developed by a registered nurse employed by the home care agency" (63 O.S. 1-1962(D)(9)(e)). Our reading: a contracted nurse may not count, and OSDH has not said otherwise.

Example: Avery Quinn, RN
Prints in: policies 1.3, 1.5, 2.3, 2.4 and 2.5

Answer: _____

Q35. Registered nurse who supervises in-service training for certified aides

Only asked, and then required, if Q27 is "No" and Q25 is not "Only caregivers trained by our registered nurse".

In-service education for home care aides is generally supervised by a registered nurse with at least two years of nursing experience, at least one of them in home care (OAC 310:677-9-1(a)(2)).

Example: Casey Morgan, RN
Prints in: policies 2.3 and 2.5

Answer: _____

Builder step: How you'll operate

Q40. How staff get their free flu vaccine

Required.

Describe the arrangement in one line. Staff vaccinated elsewhere can show proof instead. The annual influenza program offers vaccination at no charge to all employees and workers, or accepts documented evidence of current-season vaccination from another source (OAC 310:662-3-4(e)(7)(A)). Since August 11, 2025 the offer no longer has to be onsite.

Example: A voucher for any Sample Pharmacy location, paid by the agency
Prints in: policy 2.7

Answer: _____

Q41. Month of the yearly flu program evaluation

Pre-filled if left blank.

Choose a month after flu season. The month is your choice and becomes your policy. Each agency's influenza vaccination program conducts an annual evaluation, including the reasons for non-participation (OAC 310:662-3-4(e)(7)(D)).

Example: May
If left blank, prints as: May
Prints in: policy 2.7

Answer: _____

Q42. Client records reviewed each quarter

Pre-filled if left blank.

No rule sets the sample size. It is your choice and becomes your policy. The quality program uses at least client satisfaction surveys and sample clinical record reviews, and reports in writing at least every three months to the administrator and governing body (OAC 310:662-5-4(b)).

Example: 10 percent of active client records, and at least 5
If left blank, prints as: 10 percent of active client records, and at least 5
Prints in: policy 1.9

Answer: _____

Q43. Months of the quarterly quality report

Pre-filled if left blank.

Program assessments and recommendations are documented and reported in writing at least each three months to the administrator and the governing body (OAC 310:662-5-4(b)(2)).

Example: January, April, July and October
If left blank, prints as: January, April, July and October
Prints in: policy 1.9

Answer: _____

Q44. Days to give a written answer to a client's grievance

Pre-filled if left blank.

No Oklahoma rule sets this number. It is your choice and becomes your policy. The rights statement explains the agency's grievance procedure and the right to register a grievance without reprisal or discrimination (OAC 310:662-3-2(b)(7)).

Format: a whole number of up to three digits
Example: 10
If left blank, prints as: 10
Prints in: policies 3.1 and 3.3

Answer: _____

Q45. Where caregivers get gloves and other protective equipment

Required.

The manual includes an infection control policy for the home care setting (OAC 310:662-3-6(b)(1)).

Example: Supply cabinet at the office; each caregiver gets a starter kit at orientation
Prints in: policies 2.5 and 4.1

Answer: _____

Q46. Who keeps client records if the agency closes

Required.

A job title or role is enough. Client records are kept at least five years after the client was last seen, or longer if another law requires (OAC 310:662-3-5(c)), and that does not stop when an agency closes. Since August 11, 2025 the rule sets no closure procedure, so the manual names who keeps the records.

Example: The owner, at the agency's mailing address
Prints in: policies 1.2 and 3.9

Answer: _____

Q47. Date the governing body adopts the manual

Required.

The agency shall implement and follow appropriate written policies (OAC 310:662-3-4(e)), and OSDH expects the agency to be ready for business at the initial survey.

Format: a date
Example: November 1, 2026
Prints in: the cover page and policies 1.1 and 1.3

Answer: _____

Q48. Next review date

Required.

The rules set no review cycle for the whole manual. Our suggestion: review every year, and whenever OSDH changes Chapter 662 (a revision is being prepared). Client care policies are reviewed and revised as necessary (OAC 310:662-3-6(a)).

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

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	Are you applying, or already licensed?	Applying for a new license
Q2	Will you have branch offices?	No
Q3	Agency legal name	Sample Home Care, LLC
Q4	Trade name (d.b.a.), if different	Sample Home Care
Q5	Office address	100 Main Street, Suite 200, Oklahoma City, OK 73102
Q6	Branch office addresses and phone numbers	Not asked with these answers
Q7	Office phone	(405) 555-0100
Q8	After-hours phone number	(405) 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	Counties you serve	Oklahoma, Cleveland and Canadian counties
Q12	OSDH license number	HC0000
Q13	Governing body	Sample Home Care, LLC, through its members Morgan Ellis and Riley Chen
Q14	Month of the governing body's yearly review of the agency	January

Builder step: Services and clients

	Question	Sample answer
Q15	Will caregivers also help with household tasks, shopping, meals, transportation or companionship?	Yes
Q16	Will caregivers drive clients?	No
Q17	Will caregivers remind clients to take their medication?	Yes, reminders only

	Question	Sample answer
Q18	Will any client's personal care be provided under a physician's or practitioner's order?	No
Q19	Will you serve clients under 18?	No
Q20	Will you use contract staff or another provider for any home care services?	No, our own employees only
Q21	Person who supervises companion services	Jordan Lee
Q22	How clients pay for services	Private pay and long-term care insurance
Q23	Your charges (unit charges)	$32.00 per hour, with a 2-hour minimum visit
Q24	Billing method, payment options and due dates	Invoiced every two weeks; due within 14 days by card or bank transfer

Builder step: Administrator, nurses and caregivers

	Question	Sample answer
Q25	Who will give hands-on personal care?	Certified home health aides or CNAs, and caregivers trained by our registered nurse
Q26	How will your supervising registered nurse work for you?	As an employee
Q27	Does your supervising nurse have at least two years of nursing experience, at least one of them in home care?	Yes
Q28	Who will make the supervisory home visits for clients cared for by certified aides and CNAs?	A registered nurse
Q29	How often will a nurse visit each client's home to supervise care by certified aides and CNAs?	At least every six months (the rule's minimum), more often when the client's condition needs it
Q30	Will new hires ever work before OSDH's background check result arrives?	No, never
Q31	Administrator	Jordan Lee
Q32	Supervising registered nurse	Avery Quinn, RN
Q33	Alternate (registered nurse or physician)	Casey Morgan, RN
Q34	Registered nurse employed by the agency who writes the caregiver training plan	Not asked with these answers
Q35	Registered nurse who supervises in-service training for certified aides	Not asked with these answers

Builder step: How you'll operate

	Question	Sample answer
Q36	Which TB test will you use for new staff?	Either a blood test or a skin test
Q37	How will you offer the flu vaccine?	At a pharmacy or clinic, paid by the agency
Q38	How will you keep client and staff records?	Partly on paper and partly electronically
Q39	Include recommended practices?	Yes, include them
Q40	How staff get their free flu vaccine	A voucher for any Sample Pharmacy location, paid by the agency
Q41	Month of the yearly flu program evaluation	May
Q42	Client records reviewed each quarter	10 percent of active client records, and at least 5
Q43	Months of the quarterly quality report	January, April, July and October
Q44	Days to give a written answer to a client's grievance	10
Q45	Where caregivers get gloves and other protective equipment	Supply cabinet at the office; each caregiver gets a starter kit at orientation
Q46	Who keeps client records if the agency closes	The owner, at the agency's mailing address
Q47	Date the governing body adopts the manual	November 1, 2026
Q48	Next review date	November 1, 2027

What these answers do to the manual

- Policy 1.8 Contracted services prints as "Not applicable", because it applies only when Q20 is "Yes".
- In 30 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.

Q25. Who will give hands-on personal care?

In Policy 1.3 Plan of delivery: the scope and range of our services, the sample answer "Certified home health aides or CNAs, and caregivers trained by our registered nurse" prints:

> Form 757 item 10 names personal care only as Home Health Aid and as Medicaid Waiver (Advantage) Personal Care. Sample Home Care, LLC's personal care, including the personal care given by personal care workers trained by its registered nurse under 63 O.S. 1-1962(D)(9), is described in section 3, and the caregivers who give it in section 7.
>
> `Policy 1.3 Plan of delivery: the scope and range of our services, sample answer`

The answer "Only certified home health aides and certified nurse aides (CNAs)" prints this instead:

> Form 757 item 10 names personal care only as Home Health Aid and as Medicaid Waiver (Advantage) Personal Care. Sample Home Care, LLC's personal care is described in section 3, and the caregivers who give it in section 7.
>
> `Policy 1.3 Plan of delivery: the scope and range of our services, other answer`

Q15. Will caregivers also help with household tasks, shopping, meals, transportation or companionship?

In Policy 1.3 Plan of delivery: the scope and range of our services, the sample answer "Yes" prints:

> 11. **Clients who receive companion services only.** The companion services supervisor prepares an Individual Service Plan at the initial evaluation, after consulting the client or representative, gives it to the caregiver before or at the first visit, and reviews and updates it at least every six months. These clients also receive the statement of client rights and responsibilities (Policy 3.12).
>
> `Policy 1.3 Plan of delivery: the scope and range of our services, sample answer`

The answer "No, personal care only" prints this instead:

> Sample Home Care, LLC does not provide companion or sitter services (household tasks, shopping, meal preparation, transportation or companionship as a service of their own). Its caregivers give personal care only.
>
> `Policy 1.3 Plan of delivery: the scope and range of our services, other answer`

Q20. Will you use contract staff or another provider for any home care services?

Policy 1.8 Contracted 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 provides all home care services through its own employees and does not contract with any other agency or individual to provide them. Before it ever does, it will adopt this policy and sign a written agreement meeting OAC 310:662-3-4(g).
>
> `Policy 1.8 Contracted services, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 3.1, Client rights and responsibilities, and client autonomy, as it prints in the Oklahoma manual: https://www.carerulebook.com/samples/us-oklahoma-home-care.pdf