CARERULEBOOK OREGON MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Oregon manual builder asks: 19 decisions and 28 details, 47 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/oregon/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 (the parent agency)]) 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:

- Administrator

- Administrator's designee
- Qualified trainer you designate for caregiver training
- Background check vendor

PART 1

Part 1. Decisions to settle first

These 19 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 checklist of what the 2021 rewrite and the 2023 amendments added, and the areas OHA cites most, each with the policy that answers it. Changing to Basic? Choose Basic below. OHA approves a change of classification before you provide the new services, and asks for all your policies and procedures, revised for the new class, with the request (OAR 333-536-0010(5)(a)(B)).

☐ Applying for a new license (builder default)
☐ Already licensed
☐ Licensed as Limited and changing to Basic

What it changes:

- Changes the wording of 2 policies:
  - Policy 1.1 Our policies and procedures, and the IHC Initial Checklist index
  - Policy 1.2 License, changes, renewal, surveys and plans of correction

Q2. Which classification will you hold?

Limited caregivers may remind clients to take their medication but never touch it or its containers. Basic adds medication assistance, after four hours of medication training and a return demonstration. Neither class needs a nurse on staff. The state fee for a new license is $2,000 for Limited and $2,250 for Basic (ORS 443.315(4)). Intermediate and Comprehensive (medication administration, filling pill organizers, nursing services) need an employed registered nurse and are not covered by this manual.

☐ Limited: personal care, which may include medication reminding (builder default)
☐ Basic: personal care, medication reminding and medication assistance

What it changes:

- Policy 6.4 Medication training and return demonstration applies only when Q2 is "Basic: personal care, medication reminding and medication assistance". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Policy 6.6 Medication assistance applies only when Q2 is "Basic: personal care, medication reminding and medication assistance". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 18 policies:
  - Policy 1.1 Our policies and procedures, and the IHC Initial Checklist index
  - Policy 1.2 License, changes, renewal, surveys and plans of correction
  - Policy 1.5 Qualified trainers, qualified individuals and qualified entities
  - Policy 2.1 Services we provide, safe provision, and services we do not provide
  - Policy 2.2 Medication reminding and the self-direct evaluation
  - Policy 3.1 Ownership, organization, administration and geographic service area
  - Policy 3.3 Complaints, incidents, accidents and internal investigations
  - Policy 4.2 Changes in a client’s condition, stable and predictable, and referral
  - Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 5.3 Initial evaluation and service plan
  - Policy 6.1 Caregiver qualifications, staffing and assignment
  - Policy 6.2 Caregiver orientation
  - Policy 6.3 Initial caregiver training and competency evaluation
  - Policy 6.5 Annual caregiver education
  - Policy 7.1 Infection control program
  - Policy 7.2 Client records
  - Policy 7.3 Quality assessment and performance improvement
- Decides whether the builder asks Q15, Q31, Q38 and Q39.
- Changes what the manual's cover page lists.

Q3. Will you have a branch office?

A branch is within 60 miles of the parent office, managed by it, and added to the license before any services are provided from it (OAR 333-536-0050(3)). Scheduling, training and records stay at the parent office. OHA charges no fee for a branch.

☐ No (builder default)
☐ Yes, within 60 miles of the office

What it changes:

- Changes the wording of 2 policies:

- Policy 1.2 License, changes, renewal, surveys and plans of correction
- Policy 3.1 Ownership, organization, administration and geographic service area

Q4. Will you serve clients from an office more than 60 miles away?

An office more than 60 miles from the parent is a subunit: same owners, its own staff, separately licensed with its own fee (OAR 333-536-0050(4)). It may use the parent's policy templates but must meet every rule itself.

☐ No (builder default)
☐ Yes, a subunit

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.2 License, changes, renewal, surveys and plans of correction
  - Policy 3.1 Ownership, organization, administration and geographic service area
  - Policy 6.3 Initial caregiver training and competency evaluation

Builder step: Services and clients

Q14. Will caregivers give medication reminders?

A reminder is an audio, visual or spoken prompt, only for a client who can self-direct, recorded on OHA's Medication Self-Direct Evaluation Tool at the start and at least every 90 days (OAR 333-536-0005(24), 0045(3)-(5)). Three of OHA's ten most cited survey tags in the first half of 2026 were about medication reminding and the self-direct evaluation.

☐ Yes, to clients who can self-direct (builder default)
☐ No

What it changes:

- Changes the wording of 8 policies:
  - Policy 2.1 Services we provide, safe provision, and services we do not provide
  - Policy 2.2 Medication reminding and the self-direct evaluation
  - Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 5.3 Initial evaluation and service plan
  - Policy 6.1 Caregiver qualifications, staffing and assignment
  - Policy 6.2 Caregiver orientation
  - Policy 6.3 Initial caregiver training and competency evaluation

Q15. Will family members fill pill organizers that caregivers then help with?

Only asked if Q2 is "Basic: personal care, medication reminding and medication assistance".

Caregivers in a Basic agency never fill pill organizers: OHA treats that as medication administration. A client representative or family member may fill them after signing an agreement to keep a medication list, keep the original labeled containers in the home and use closed, labeled containers made for the purpose (OAR 333-536-0075(2)).

☐ No (builder default)
☐ Yes, with a signed family agreement

What it changes:

- Changes the wording of 3 policies:
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 5.3 Initial evaluation and service plan
  - Policy 6.6 Medication assistance

Q16. Will some clients get only housekeeping and supportive services?

For clients who get only housekeeping and supportive services, the service plan, caregiver training, medication, client record and quality rules do not apply to those clients (OAR 333-536-0045(9)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 8 policies:
  - Policy 2.1 Services we provide, safe provision, and services we do not provide
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 5.3 Initial evaluation and service plan
  - Policy 5.4 Initial visit and quarterly monitoring visits
  - Policy 6.1 Caregiver qualifications, staffing and assignment
  - Policy 6.5 Annual caregiver education
  - Policy 7.2 Client records
  - Policy 7.3 Quality assessment and performance improvement

Q17. Will caregivers drive clients?

Each person whose duties include driving clients needs a valid driver's license and current auto insurance on file (OAR 333-536-0053(9)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Services we provide, safe provision, and services we do not provide

- Policy 3.3 Complaints, incidents, accidents and internal investigations
- Policy 3.5 Medical and non-medical emergency response
- Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
- Policy 5.1 Accepting clients, the disclosure statement and the service agreement

Q18. Will caregivers trim or file clients' nails?

Foot and nail care is a personal care task. A caregiver who provides nail technology as ORS 690.005 defines it may be subject to the cosmetology certification rules (OAR 333-536-0045(2)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 3 policies:
  - Policy 2.1 Services we provide, safe provision, and services we do not provide
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 6.3 Initial caregiver training and competency evaluation

Q19. Will you take a deposit?

Your disclosure statement gives your deposit and refund policy either way (OAR 333-536-0055(3)(i)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 2 policies:
  - Policy 3.4 Client notifications: cost increases, deposits and refunds, cancellation, termination, and reimbursement for loss
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
- Decides whether the builder asks Q24 and Q25.

Builder step: People and training

Q27. How does the administrator qualify?

Either route needs a high school diploma and at least two years of experience (OAR 333-536-0052(1)). OHA asks for the administrator's resume with proof of the experience and the diploma with the application.

☐ Management experience in a health-related field (builder default)
☐ Professional experience: a health care license, certificate or degree used in a health-related field

What it changes:

- Changes the wording of Policy 4.1 Administrator, designee and delegate.

Q28. Will the administrator name a designee?

The administrator or designee must be accessible and available during all hours in which services are provided (OAR 333-536-0052(5)). A designee must meet every administrator qualification.

☐ Yes (builder default)
☐ No, the administrator covers all service hours

What it changes:

- Changes the wording of 7 policies:
  - Policy 3.1 Ownership, organization, administration and geographic service area
  - Policy 4.1 Administrator, designee and delegate
  - Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 5.3 Initial evaluation and service plan
  - Policy 5.4 Initial visit and quarterly monitoring visits
  - Policy 7.3 Quality assessment and performance improvement
- When Q28 is "No, the administrator covers all service hours", job titles change throughout: "the administrator, designee or delegate" reads "the administrator or delegate" and "the administrator or designee" reads "the administrator".
- Decides whether the builder asks Q34.
- Changes what the manual's cover page lists.

Q29. Will the administrator use a delegate for some tasks?

A delegate, such as a client care coordinator, may do the tasks the rules allow a delegate to do (for example initial evaluations, service plans and monitoring visits) without meeting the administrator qualifications (OAR 333-536-0052(4)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 12 policies:
  - Policy 3.1 Ownership, organization, administration and geographic service area

    - Policy 4.1 Administrator, designee and delegate
    - Policy 4.2 Changes in a client's condition, stable and predictable, and referral
    - Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
    - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
    - Policy 5.2 Client rights and the rights notice
    - Policy 5.3 Initial evaluation and service plan
    - Policy 5.4 Initial visit and quarterly monitoring visits
    - Policy 6.1 Caregiver qualifications, staffing and assignment
    - Policy 6.2 Caregiver orientation
    - Policy 6.3 Initial caregiver training and competency evaluation
    - Policy 7.3 Quality assessment and performance improvement
- When Q29 is "No", job titles change throughout: "the administrator, designee or delegate" reads "the administrator or designee" and "the administrator or delegate" reads "the administrator".
- Decides whether the builder asks Q35.

Q30. Who gives caregivers their eight hours of initial training?

Training comes from a qualified trainer, qualified individual or qualified entity, and the administrator or designee evaluates each caregiver's competency by direct observation plus a written or oral test before the caregiver works independently (OAR 333-536-0070(6)).

☐ A qualified trainer we designate (builder default)
☐ An OHA-approved training program (qualified entity)
☐ Both, depending on the topic

What it changes:

- Changes the wording of 2 policies:
    - Policy 1.5 Qualified trainers, qualified individuals and qualified entities
    - Policy 6.3 Initial caregiver training and competency evaluation
- Decides whether the builder asks Q36 and Q37.

Q31. Who gives medication training?

Only asked if Q2 is "Basic: personal care, medication reminding and medication assistance".

A qualified trainer cannot give medication training (OHA qualified trainer memo). The return demonstration is always evaluated by a qualified individual.

☐ An OHA-approved training program (qualified entity) (builder default)
☐ A qualified individual, for example an RN, LPN or pharmacist

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.5 Qualified trainers, qualified individuals and qualified entities
  - Policy 5.1 Accepting clients, the disclosure statement and the service agreement
  - Policy 6.4 Medication training and return demonstration

Q32. Who gives caregivers their six hours of education each year?

The rule allows a qualified trainer, qualified individual or qualified entity (OAR 333-536-0070(14)), but OHA's training guide lists only a qualified entity or qualified individual for continued education. Until OHA says otherwise, the first option meets both.

☐ An OHA-approved program or a qualified individual (builder default)
☐ Any of these, including the qualified trainer we designate

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.5 Qualified trainers, qualified individuals and qualified entities
  - Policy 6.1 Caregiver qualifications, staffing and assignment
  - Policy 6.5 Annual caregiver education

Builder step: How you'll operate

Q42. How does your background check vendor qualify?

OAR 333-536-0093(8). Keep the vendor's proof with your records.

☐ Accredited by the National Association of Professional Background Screeners (builder default)
☐ In business two years or more, licensed as its home state requires, with at least $1 million of errors and omissions insurance

What it changes:

- Changes the wording of Policy 7.4 Criminal records checks and fitness determinations.

Q43. How will you keep client and personnel records?

Every entry is dated and signed, or electronically authenticated with safeguards against unauthorized access (OAR 333-536-0085(4)). OHA asks for read-only access to any electronic records system at relicensure surveys.

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

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Our policies and procedures, and the IHC Initial Checklist index

  - Policy 4.3 Pre-employment screening, personnel records, position descriptions and performance evaluations
  - Policy 7.2 Client records

Q44. Include recommended practices?

Some policies end with steps that go beyond Oregon's rules, such as a yearly policy review or a monthly look at the complaint log. Once adopted they are your policies and OHA can expect you to follow them, so leave them out if you won't.

☐ Yes, include them (builder default)
☐ No, only what the rules and OHA's checklist require

What it changes:

- Keeps or removes the "Recommended practice" section at the end of 29 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 1.1 Our policies and procedures, and the IHC Initial Checklist index.

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.

- Q22. Days of written notice before a price increase (pre-filled: 30)
- Q23. Hours of notice you ask clients to give when they cancel a visit (pre-filled: 24)
- Q25. Days to refund the unused part of a deposit after services end (pre-filled: 14)
- Q26. Days to repay a client once an investigation confirms that staff took, broke or misused their property or money (pre-filled: 30)
- Q46. Days to finish investigating a complaint or incident (pre-filled: 14)

PART 2

Part 2. Agency details

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

Builder step: Your agency

Q5. Agency legal name

Required.

Exactly as on your application in OHA's online licensing portal. The license is issued only for the agency and persons named in the application and cannot be transferred or assigned (OAR 333-536-0021(2)).

Example: Sample Home Care, LLC
Prints in: the cover page and 29 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q6. Assumed business name, if different

Optional.

Only a licensed agency may use the term "in-home care agency" in its advertising, and it may use only the classification title it is licensed for (OAR 333-536-0007(2), 0010(6)).

Example: Sample Home Care
Prints in: the cover page

Answer: _____

Q7. Office address (the parent agency)

Required.

Your geographic service area is 60 miles in any direction from this office (OAR 333-536-0005(12)). The license is posted here where the public can see it, and client records are kept here (OAR 333-536-0021(3), 0085(1)).

Example: 100 Main Street, Suite 200, Salem, OR 97301
Prints in: the cover page and 12 policies (including 1.1, 1.2, 3.1 and 3.3)

Answer: _____

Q8. Office phone

Required.

Printed on the disclosure statement and the client rights notice.

Format: a full phone number, with area code
Example: (503) 555-0100
Prints in: 7 policies (including 1.1, 3.1, 3.3 and 3.4)

Answer: _____

Q9. Number clients and caregivers use to reach the administrator or designee during all service hours

Required.

The administrator or designee must be accessible and available during all hours in which services are provided, and the disclosure statement says how to contact them (OAR 333-536-0052(5), 0055(3)(L)). It can be the office number if calls are forwarded.

Format: a full phone number, with area code
Example: (503) 555-0199
Prints in: 11 policies (including 3.1, 3.2, 3.3 and 3.4)

Answer: _____

Q10. Agency email address

Required.

Printed in client notices so clients and families can reach you in writing.

Example: office@samplehomecare.com
Prints in: policies 3.1, 3.2, 3.3, 5.1 and 5.2

Answer: _____

Q11. Geographic service area (cities or counties you serve)

Required.

The area where you generally intend to provide services. It must be within 60 miles of your office. An agency identifies in writing the geographic area in which it generally intends to provide services, within 60 miles of the parent agency or subunit (OAR 333-536-0050(2)).

Example: Marion, Polk and Yamhill counties
Prints in: the cover page and policies 3.1, 3.4 and 5.1

Answer: _____

Q12. OHA license number

Optional.

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

Example: IHC 0000
Prints in: policies 1.2, 5.1 and 7.2

Answer: _____

Q13. Owners

Required.

The owner assumes full legal, financial and overall responsibility for the agency (OAR 333-536-0050(5)). OHA itself checks the criminal records of an owner or administrator who has direct contact with clients (OAR 333-536-0093(14)). Adding or removing an owner, or a change of more than five percent interest, is a change of ownership (OAR 333-536-0005(10)).

Example: Morgan Ellis (60%) and Riley Chen (40%)
Prints in: the cover page and policy 3.1

Answer: _____

Builder step: Services and clients

Q20. Your charges

Required.

Write it the way a client would read it. The disclosure statement gives your charges, and clients have the right to be told in writing, before care starts, what the services cost and what they will pay (OAR 333-536-0055(3)(e), 0060(1)(L)). These are your prices, not a state fee.

Example: $38.00 per hour, with a 3-hour minimum visit
Prints in: policy 5.1

Answer: _____

Q21. Billing method, payment options and due dates

Required.

The disclosure statement describes billing methods, payment systems and due dates (OAR 333-536-0055(3)(g)).

Example: Invoiced every two weeks; due within 14 days by card or bank transfer
Prints in: policies 3.4 and 5.1

Answer: _____

Q22. Days of written notice before a price increase

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your client notification policy covers increases in the cost of service, and the disclosure statement gives it (OAR 333-536-0051(4)(a), 0055(3)(h)).

Format: a whole number of up to three digits
Example: 30
If left blank, prints as: 30
Prints in: policies 3.4 and 5.1

Answer: _____

Q23. Hours of notice you ask clients to give when they cancel a visit

Pre-filled if left blank.

No rule sets this number. Choose one you can apply fairly to every client. Your notification policies cover cancellation of service, and the disclosure statement gives your deposit and refund policy, including cancellation by the client or the agency (OAR 333-536-0051(4)(c), 0055(3)(i)).

Format: a whole number of up to three digits
Example: 24
If left blank, prints as: 24
Prints in: policies 3.4 and 5.1

Answer: _____

Q24. Deposit you take before services start

Only asked, and then required, if Q19 is "Yes".

The disclosure statement gives your deposit and refund policy (OAR 333-536-0055(3)(i)).

Example: Two weeks of scheduled services
Prints in: policies 3.4 and 5.1

Answer: _____

Q25. Days to refund the unused part of a deposit after services end

Only asked, and then pre-filled if left blank, if Q19 is "Yes".

No rule sets this number. Choose one you can always meet. Your notification policies cover deposits and refunds (OAR 333-536-0051(4)(b)).

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policies 3.4 and 5.1

Answer: _____

Q26. Days to repay a client once an investigation confirms that staff took, broke or misused their property or money

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your notification policies and the disclosure statement cover reimbursement for stolen, broken or misappropriated property or funds (OAR 333-536-0051(4)(e), 0055(3)(k)).

Format: a whole number of up to three digits
Example: 30
If left blank, prints as: 30
Prints in: policies 3.4 and 5.1

Answer: _____

Builder step: People and training

Q33. Administrator

Required.

Qualified means a high school diploma and at least two years of professional or management experience in a health-related field or program (OAR 333-536-0052(1)). The policies use job titles, not names, as OHA asks; the name appears on the cover and the appointment forms.

Example: Jordan Lee
Prints in: the cover page

Answer: _____

Q34. Administrator's designee

Only asked, and then required, if Q28 is "Yes".

The administrator may assign, in writing, a designee to act as the administrator when the administrator is temporarily unavailable. The designee must meet all of the administrator qualifications (OAR 333-536-0052(3)).

Example: Casey Morgan
Prints in: the cover page

Answer: _____

Q35. Job title of the administrator's delegate

Only asked, and then required, if Q29 is "Yes".

A delegate assists with tasks the rules allow a delegate to do, such as initial evaluations, service plans and monitoring visits, and does not need the administrator qualifications (OAR 333-536-0005(5), 0052(4)). Competency evaluations after initial training stay with the administrator or designee (OAR 333-536-0070(6)).

Example: Client Care Coordinator
Prints in: 11 policies (including 3.1, 4.1, 4.3 and 5.1)

Answer: _____

Q36. Qualified trainer you designate for caregiver training

Only asked, and then required, if Q30 is not "An OHA-approved training program (qualified entity)".

An agency-designated qualified trainer has two or more years of experience working with an agency, a long-term care facility, a residential care facility or another health care setting and, if a caregiver, is current with caregiver training (OAR 333-536-0005(38)(b)). OHA has no approved course for qualified trainers, and a qualified trainer cannot give medication training (OHA qualified trainer memo).

Example: Avery Quinn, Training Lead
Prints in: policy 1.5

Answer: _____

Q37. OHA-approved training program (qualified entity) you use

Only asked, and then required, if Q30 is not "A qualified trainer we designate".

A qualified entity is an entity whose training program OHA has approved (OAR 333-536-0005(36)). OHA's qualified entity memo lists the approved programs and the modules caregivers must complete.

Example: Sample Caregiver Academy, online caregiver training
Prints in: policies 1.5 and 6.3

Answer: _____

Q38. Who gives caregivers their four hours of medication training

Only asked, and then required, if Q2 is "Basic: personal care, medication reminding and medication assistance".

Medication training for a Basic agency is given by a qualified individual or qualified entity (OAR 333-536-0070(8)(b)) and covers the topic areas in OAR 333-536-0070(8)(a).

Example: Sample Medication Training (OHA-approved qualified entity)
Prints in: policies 1.5 and 6.4

Answer: _____

Q39. Qualified individual who evaluates caregivers' return demonstrations

Only asked, and then required, if Q2 is "Basic: personal care, medication reminding and medication assistance".

Before giving medication assistance, each caregiver shows safe technique in a successful return demonstration evaluated by a qualified individual, who signs a statement that the caregiver is competent (OAR 333-536-0070(8)(c), (9)(d)). OHA's training guide points to a

physician, nurse practitioner, naturopathic physician, RN, LPN, physician associate or pharmacist (OAR 333-536-0005(37)(b)). This person does not have to be on your staff.

Example: Avery Quinn, RN (contracted)
Prints in: policies 1.5 and 6.4

Answer: _____

Q40. Date the agency adopts the manual

Required.

The agency develops, implements and enforces its written policies and procedures (OAR 333-536-0051).

Format: a date
Example: November 1, 2026
Prints in: the cover page and 29 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q41. Next review date

Required.

The rules set no review cycle. OHA says policies must be updated when the rules are revised or your practice changes. Our suggestion: review every year, and whenever OHA changes the rules. OHA's policy and procedure memo also says your policies should match what the agency actually does.

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

Answer: _____

Builder step: How you'll operate

Q45. Background check vendor

Required.

Criminal records checks are performed by a vendor accredited by the National Association of Professional Background Screeners, or one in business at least two years, with a current business license and any private investigator license its home state requires, and errors and omissions insurance of at least $1 million (OAR 333-536-0093(8)).

Example: Sample Screening, Inc.
Prints in: policy 7.4

Answer: _____

Q46. Days to finish investigating a complaint or incident

Pre-filled if left blank.

The rule says timely; no rule sets a number. Choose one you can always meet. The administrator or designee ensures a timely internal investigation and keeps the complaint, who was interviewed, the results and the actions taken in a file separate from client and caregiver records (OAR 333-536-0052(6)(h)).

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policies 3.3 and 5.2

Answer: _____

Q47. Where caregivers get gloves and other protective equipment

Required.

Your infection control policies cover the availability of personal protective equipment, and OHA's checklist asks for PPE availability and access information (OAR 333-536-0082(3)(b)).

Example: Supply room at the office; each caregiver gets a starter kit at orientation and restocks weekly
Prints in: policy 7.1

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	Which classification will you hold?	Limited: personal care, which may include medication reminding
Q3	Will you have a branch office?	No
Q4	Will you serve clients from an office more than 60 miles away?	No
Q5	Agency legal name	Sample Home Care, LLC
Q6	Assumed business name, if different	Sample Home Care
Q7	Office address (the parent agency)	100 Main Street, Suite 200, Salem, OR 97301
Q8	Office phone	(503) 555-0100
Q9	Number clients and caregivers use to reach the administrator or designee during all service hours	(503) 555-0199
Q10	Agency email address	office@samplehomecare.com
Q11	Geographic service area (cities or counties you serve)	Marion, Polk and Yamhill counties
Q12	OHA license number	IHC 0000
Q13	Owners	Morgan Ellis (60%) and Riley Chen (40%)

Builder step: Services and clients

	Question	Sample answer
Q14	Will caregivers give medication reminders?	Yes, to clients who can self-direct
Q15	Will family members fill pill organizers that caregivers then help with?	Not asked with these answers
Q16	Will some clients get only housekeeping and supportive services?	No
Q17	Will caregivers drive clients?	No

	Question	Sample answer
Q18	Will caregivers trim or file clients' nails?	No
Q19	Will you take a deposit?	No
Q20	Your charges	$38.00 per hour, with a 3-hour minimum visit
Q21	Billing method, payment options and due dates	Invoiced every two weeks; due within 14 days by card or bank transfer
Q22	Days of written notice before a price increase	30
Q23	Hours of notice you ask clients to give when they cancel a visit	24
Q24	Deposit you take before services start	Not asked with these answers
Q25	Days to refund the unused part of a deposit after services end	Not asked with these answers
Q26	Days to repay a client once an investigation confirms that staff took, broke or misused their property or money	30

Builder step: People and training

	Question	Sample answer
Q27	How does the administrator qualify?	Management experience in a health-related field
Q28	Will the administrator name a designee?	Yes
Q29	Will the administrator use a delegate for some tasks?	No
Q30	Who gives caregivers their eight hours of initial training?	A qualified trainer we designate
Q31	Who gives medication training?	Not asked with these answers
Q32	Who gives caregivers their six hours of education each year?	An OHA-approved program or a qualified individual
Q33	Administrator	Jordan Lee
Q34	Administrator's designee	Casey Morgan
Q35	Job title of the administrator's delegate	Not asked with these answers
Q36	Qualified trainer you designate for caregiver training	Avery Quinn, Training Lead
Q37	OHA-approved training program (qualified entity) you use	Not asked with these answers

	Question	Sample answer
Q38	Who gives caregivers their four hours of medication training	Not asked with these answers
Q39	Qualified individual who evaluates caregivers' return demonstrations	Not asked with these answers
Q40	Date the agency adopts the manual	November 1, 2026
Q41	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q42	How does your background check vendor qualify?	Accredited by the National Association of Professional Background Screeners
Q43	How will you keep client and personnel records?	Partly on paper and partly electronically
Q44	Include recommended practices?	Yes, include them
Q45	Background check vendor	Sample Screening, Inc.
Q46	Days to finish investigating a complaint or incident	14
Q47	Where caregivers get gloves and other protective equipment	Supply room at the office; each caregiver gets a starter kit at orientation and restocks weekly

What these answers do to the manual

- Policy 6.4 Medication training and return demonstration prints as "Not applicable", because it applies only when Q2 is "Basic: personal care, medication reminding and medication assistance".
- Policy 6.6 Medication assistance prints as "Not applicable", because it applies only when Q2 is "Basic: personal care, medication reminding and medication assistance".
- Job titles change throughout: "the administrator, designee or delegate" reads "the administrator or designee" and "the administrator or delegate" reads "the administrator".
- In 26 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.

Q29. Will the administrator use a delegate for some tasks?

In Policy 4.1 Administrator, designee and delegate, the sample answer "No" prints:

> 9. Sample Home Care, LLC does not use a delegate. The tasks in the table are done by the administrator or designee. Before any person acts as a delegate, the administrator completes the delegate assignment form at the end of this policy for that person.
>
> `Policy 4.1 Administrator, designee and delegate, sample answer`

The answer "Yes" prints this instead:

> 9. Sample Home Care, LLC's administrator assigns the Client Care Coordinator as the administrator's delegate, using the delegate assignment form at the end of this policy, which lists the tasks delegated, each with its rule. The delegate does only those tasks, under the administrator's direction, and tells the administrator or designee about anything that needs a decision outside them.
>
> `Policy 4.1 Administrator, designee and delegate, other answer`

Q14. Will caregivers give medication reminders?

In Policy 2.1 Services we provide, safe provision, and services we do not provide, the sample answer "Yes, to clients who can self-direct" prints:

> 8. medication reminding, for a client who can self-direct, as Policy 2.2 sets out.
>
> `Policy 2.1 Services we provide, safe provision, and services we do not provide, sample answer`

The answer "No" prints this instead:

> 8. Sample Home Care, LLC does not currently provide medication reminding. Before it starts, the administrator updates Policy 2.2 and the disclosure statement (Policy 5.1).
>
> `Policy 2.1 Services we provide, safe provision, and services we do not provide, other answer`

Q2. Which classification will you hold?

Policy 6.4 Medication training and return demonstration prints in full only when Q2 is "Basic: personal care, medication reminding and medication assistance". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC is licensed in the Limited classification, so its caregivers do not provide medication assistance or any other medication service, and the four hours of medication training and the return demonstration do not apply. Caregivers may give medication reminders only, as Policy 2.2 describes. Before offering medication assistance, the agency will apply to OHA to change its classification, revise its policies and procedures, and have every caregiver who will assist with medication trained and evaluated as OAR 333-536-0070(8) requires.
>
> `Policy 6.4 Medication training and return demonstration, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 1.4, Abuse and neglect: recognizing, reporting and cooperating with investigations, as it prints in the Oregon manual: https://www.carerulebook.com/samples/us-oregon-home-care.pdf