CARERULEBOOK SOUTH CAROLINA MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook South Carolina manual builder asks: 21 decisions and 26 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/south-carolina/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 [Primary 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:

- Administrator

PART 1

Part 1. Decisions to settle first

These 21 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. Where is your agency today?

The rewritten R.60-122 applies to every provider from May 22, 2026, with no transition period in the text. Choose "Already licensed" if your agency held its DPH license before that date: policy 1.1 then ends with a checklist of what changed on May 22, 2026 and a plan for bringing your current clients' and staff paperwork up to the new rule, and the other policies say what changed for them. Enter your DPH license number in the same step.

☐ Applying for a first license (builder default)
☐ Already licensed and updating to the May 22, 2026 rule

What it changes:

- Changes the wording of 27 policies:
  - Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk
  - Policy 1.2 License, application, renewal, amendments, change of licensee and variances
  - Policy 1.3 Primary office, zoning and multiple locations
  - Policy 1.4 Inspections, investigations and plans of correction
  - Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers’ compensation
  - Policy 2.1 Administrator
  - Policy 2.2 Criminal background, residency and registry checks
  - Policy 2.3 Drug testing: pre-employment and random
  - Policy 2.4 Staff records
  - Policy 2.5 Training before client contact and every year
  - Policy 2.6 Caregiver minimum qualifications and hiring
  - Policy 2.8 Health self-assessment and communicable disease
  - Policy 3.1 Incidents: documentation, 24-hour reports and 5-day investigation reports
  - Policy 3.2 Abuse, neglect and exploitation: prevention and reporting
  - Policy 3.3 Closure and continuity of care

- Policy 4.1 Client records: content, visit documentation, storage and retention
- Policy 4.2 Service agreement: services, fees, refunds and termination
- Policy 4.3 Care services plan
- Policy 4.4 Confidentiality and privacy of client information
- Policy 5.1 Care services and the non-medical limit
- Policy 5.2 Medication reminders
- Policy 5.3 Shopping, errands and client funds
- Policy 5.4 Transportation
- Policy 6.1 Infection control
- Policy 7.1 Rights and assurances
- Policy 8.1 Disaster plan
- Policy 8.2 Emergency procedures and call numbers

Q2. What is your business?

This decides who signs the application: the owner or owners, two officers of a corporation, or (DPH's form says) the head of an LLC. Those signers need a SLED check and a drug test, and stay in the random drug testing pool (R.60-122 §103.F-H, §402.C).

☐ An LLC (builder default)
☐ A corporation
☐ A partnership
☐ A sole proprietor

What it changes:

- Changes the wording of Policy 1.2 License, application, renewal, amendments, change of licensee and variances.

Q3. Where is your primary office?

The primary office must be in a commercially zoned or unzoned area (R.60-122 §103.D.1). A home in a residential zone does not qualify, by our reading. The manual records the evidence you hold, or the steps still to take.

☐ In a commercially zoned area, with a county or municipal zoning permit (builder default)
☐ In an unzoned area, with a letter from the county or municipality
☐ We are still getting the zoning permit or letter

What it changes:

- Changes the wording of Policy 1.3 Primary office, zoning and multiple locations.

Q4. Will you operate from more than one office?

Each additional location is registered with DPH and approved before you operate from it (R.60-122 §103.D.2-4).

☐ No, only the primary office (builder default)
☐ Yes, registered multiple locations

What it changes:

- Changes the wording of 7 policies:
  - Policy 1.2 License, application, renewal, amendments, change of licensee and variances
  - Policy 1.3 Primary office, zoning and multiple locations
  - Policy 1.4 Inspections, investigations and plans of correction
  - Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation
  - Policy 2.4 Staff records
  - Policy 3.3 Closure and continuity of care
  - Policy 4.1 Client records: content, visit documentation, storage and retention

Q5. Does your business offer anything besides in-home care?

Other services are kept as a separate line of business, with separate marketing, caregiver records and client records (R.60-122 §103.C.6).

☐ No (builder default)
☐ Yes, for example private duty nursing or a separate service

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.2 License, application, renewal, amendments, change of licensee and variances
  - Policy 2.4 Staff records
  - Policy 4.1 Client records: content, visit documentation, storage and retention

Builder step: Services and clients

Q14. Who will pay for your clients' care?

Medicaid clients need no service agreement under R.60-122 §601.B.2. Medicaid personal care also needs an SCDHHS contract with its own rules, including RN or LPN supervision, which this manual does not cover.

☐ Clients, families and private insurance (builder default)
☐ Also Medicaid (SCDHHS)

What it changes:

- Changes the wording of 4 policies:
  - Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk

- Policy 4.1 Client records: content, visit documentation, storage and retention
- Policy 4.2 Service agreement: services, fees, refunds and termination
- Policy 7.1 Rights and assurances

Q15. Who will you serve?

Children bring Child Protective Services reporting (R.60-122 §501.D; S.C. Code 63-7-310).

☐ Adults only (builder default)
☐ Adults and children under 18

What it changes:

- Changes the wording of 6 policies:
  - Policy 2.6 Caregiver minimum qualifications and hiring
  - Policy 3.2 Abuse, neglect and exploitation: prevention and reporting
  - Policy 4.2 Service agreement: services, fees, refunds and termination
  - Policy 5.4 Transportation
  - Policy 7.1 Rights and assurances
  - Policy 7.2 Complaints

Q16. Will you serve clients who live in a nursing home or community residential care facility?

Suspected abuse of a resident of a facility is reported to the Long Term Care Ombudsman Program instead of Adult Protective Services (S.C. Code 43-35-25(D)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 6 policies:
  - Policy 3.2 Abuse, neglect and exploitation: prevention and reporting
  - Policy 5.1 Care services and the non-medical limit
  - Policy 7.1 Rights and assurances
  - Policy 7.2 Complaints
  - Policy 8.1 Disaster plan
  - Policy 8.2 Emergency procedures and call numbers

Q17. Will caregivers help clients in and out of bed, chairs or vehicles?

If they do, they are trained in proper lifting and transfer techniques before client contact and every year (R.60-122 §404.F, §700.B.4).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.5 Training before client contact and every year
  - Policy 4.1 Client records: content, visit documentation, storage and retention
  - Policy 4.2 Service agreement: services, fees, refunds and termination
  - Policy 5.1 Care services and the non-medical limit
  - Policy 5.4 Transportation

Q18. Will caregivers give medication reminders?

The rule's care services list includes medication reminders (R.60-122 §700.B.13) and limits caregivers to non-medical tasks. The manual never has caregivers give medication or fill pill organizers.

☐ Yes, reminders only (builder default)
☐ No, caregivers do not help with medication at all

What it changes:

- Changes the wording of 5 policies:
  - Policy 4.1 Client records: content, visit documentation, storage and retention
  - Policy 4.2 Service agreement: services, fees, refunds and termination
  - Policy 4.3 Care services plan
  - Policy 5.1 Care services and the non-medical limit
  - Policy 5.2 Medication reminders

Q19. Will caregivers shop or run errands for clients?

Receipts go to the client and the client's money is accounted for in writing (R.60-122 §700.B.8).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 5 policies:
  - Policy 4.1 Client records: content, visit documentation, storage and retention
  - Policy 4.2 Service agreement: services, fees, refunds and termination
  - Policy 5.1 Care services and the non-medical limit
  - Policy 5.2 Medication reminders
  - Policy 5.3 Shopping, errands and client funds
- Decides whether the builder asks Q26.

Q20. Will caregivers drive clients?

Drivers need a valid license and proof of insurance, and you keep a copy of each one's official driving record (R.60-122 §405.D).

☐ Yes
☐ No (builder default)

What it changes:

- Changes the wording of 8 policies:
  - Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation
  - Policy 2.4 Staff records
  - Policy 2.6 Caregiver minimum qualifications and hiring
  - Policy 4.1 Client records: content, visit documentation, storage and retention
  - Policy 4.2 Service agreement: services, fees, refunds and termination
  - Policy 5.1 Care services and the non-medical limit
  - Policy 5.4 Transportation
  - Policy 8.1 Disaster plan

Q21. Will you serve clients with dementia or other conditions that need specific care?

Depending on your clients, training covers care specific to their physical or mental condition, for example Alzheimer's disease or other dementias (R.60-122 §404.B).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of Policy 2.5 Training before client contact and every year.

Builder step: People and dates

Q27. How often will you review your policies?

The provider sets a review period of no more than two years for all policies, and the administrator documents and signs each review (R.60-122 §301.B).

☐ Every year (builder default)
☐ Every two years (the most the rule allows)

What it changes:

- Changes the wording of Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk.

Builder step: Hiring and how you'll operate

Q34. How will your caregivers work for you?

The rule's caregiver duties cover anyone employed, contracted or referred by the provider (R.60-122 §102.D). A staffing agency must run a criminal record check on each worker it supplies (S.C. Code 44-7-2910(A)(2)).

☐ All employees (builder default)
☐ Also independent contractors or caregivers we refer
☐ Also workers supplied by a staffing agency

What it changes:

- Changes the wording of 9 policies:
  - Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation
  - Policy 2.2 Criminal background, residency and registry checks
  - Policy 2.3 Drug testing: pre-employment and random
  - Policy 2.4 Staff records
  - Policy 2.5 Training before client contact and every year
  - Policy 2.6 Caregiver minimum qualifications and hiring
  - Policy 2.7 Supervision of caregivers
  - Policy 2.8 Health self-assessment and communicable disease
  - Policy 3.2 Abuse, neglect and exploitation: prevention and reporting

Q35. How will you run criminal record checks?

Checks are run by SLED or by a private company that uses current SLED or FBI records (S.C. Code 44-7-2920). Applicants without 12 months of verified South Carolina residency also need a federal fingerprint check through DPH.

☐ SLED CATCH online (builder default)
☐ A background check company that uses SLED or FBI records

What it changes:

- Changes the wording of Policy 2.2 Criminal background, residency and registry checks.
- Decides whether the builder asks Q41.

Q36. How will you run drug tests?

Any method needs at least a 5-panel urine, hair, saliva or blood screen. In-house kits need five documented items for every test, including the kit's lot number and expiration date (R.60-122 §402.B-C).

☐ Through a laboratory or collection site (builder default)
☐ With screening kits in the office
☐ Both

What it changes:

- Changes the wording of 2 policies:
  - Policy 2.3 Drug testing: pre-employment and random
  - Policy 2.4 Staff records
- Decides whether the builder asks Q42.

Q37. Who receives and reviews drug test results and health self-assessments?

The rule also allows a nurse, but the license needs no nurse, so the manual names the administrator or your hiring lead (R.60-122 §402.B, §406.A).

☐ The administrator (builder default)
☐ Our human resources or hiring lead

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Administrator
  - Policy 2.3 Drug testing: pre-employment and random
  - Policy 2.4 Staff records
  - Policy 2.8 Health self-assessment and communicable disease
  - Policy 6.1 Infection control

Q38. Who trains your caregivers?

Eight topics before client contact and at least annually (R.60-122 §404.A-H).

☐ We train them ourselves (builder default)
☐ An outside training provider
☐ Both, depending on the topic

What it changes:

- Changes the wording of Policy 2.5 Training before client contact and every year.
- Decides whether the builder asks Q45.

Q39. How will you keep client and staff records?

Records may be paper or electronic; electronic systems need backup and retrieval for a shutdown or power outage (R.60-122 §601.A.1, A.3).

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

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk
  - Policy 1.4 Inspections, investigations and plans of correction
  - Policy 2.4 Staff records
  - Policy 4.1 Client records: content, visit documentation, storage and retention
  - Policy 4.4 Confidentiality and privacy of client information

Q40. Include recommended practices?

Some policies end with steps that go beyond R.60-122, such as a complaints procedure that names DPH's complaint line, caregiver supervision visits and a yearly TB symptom question, each labelled as not required by the rule. Once adopted they are your policies and DPH 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 27 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 5 policies:
  - Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk
  - Policy 2.6 Caregiver minimum qualifications and hiring
  - Policy 2.7 Supervision of caregivers
  - Policy 7.1 Rights and assurances
  - Policy 7.2 Complaints

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.

- Q11. Office hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q23. Days of written notice before you change a client's fees (pre-filled: 30)
- Q24. Days to return any money owed to a client after care ends (pre-filled: 14)
- Q25. Days of written notice before you end a client's services (pre-filled: 14)
- Q26. Most a caregiver may hold of a client's money for one shopping trip (pre-filled: $100)

- Q43. How often you run a random drug testing draw (pre-filled: Every calendar quarter)
- Q44. Share of the pool tested at each draw (percent) (pre-filled: 25)
- Q46. Month each caregiver's yearly training is due by (pre-filled: The anniversary of their hire date)
- Q47. Days to finish looking into a complaint (pre-filled: 14)

PART 2

Part 2. Agency details

These 26 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q6. Agency name, as on your DPH license or application

Required.

The name may not be the same as or similar to another South Carolina licensee's, and a franchise location includes its geographic area in its name (R.60-122 §103.E). At renewal, DPH's form asks for the name exactly as it appeared the year before.

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

Answer: _____

Q7. Primary office address

Required.

At least one in-state primary office in a commercially zoned or unzoned area, where all records are kept (R.60-122 §103.D.1, §102.S). Moving it needs an amended license first (§103.L).

Example: 100 Main Street, Suite 200, Columbia, SC 29201
Prints in: the cover page and 9 policies (including 1.1, 1.2, 1.3 and 2.4)

Answer: _____

Q8. Office phone

Required.

Printed on client notices and the disaster plan clients receive (R.60-122 §1001).

Format: a full phone number, with area code
Example: (803) 555-0100
Prints in: 10 policies (including 2.7, 2.8, 3.1 and 3.2)

Answer: _____

Q9. Number caregivers call in an emergency or after hours

Required.

Caregivers must have the names and phone numbers of staff to notify in an emergency (R.60-122 §1002). It can be the office number if calls are forwarded.

Format: a full phone number, with area code
Example: (803) 555-0199
Prints in: 9 policies (including 1.1, 1.3, 1.4 and 2.7)

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 1.5, 3.3, 7.1, 7.2 and 8.1

Answer: _____

Q11. Office hours

Pre-filled if left blank.

The 2026 rule removed the old 9 a.m. to 5 p.m. weekday availability rule and sets no hours. DPH inspects without notice; if no staff are present, you must tell DPH when they will be back (R.60-122 §202.A).

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: 7 policies (including 1.1, 1.3, 1.4 and 2.7)

Answer: _____

Q12. South Carolina counties you serve

Required.

The rule sets no service area limit. The counties are named in your disaster plan and client notices.

Example: Richland, Lexington and Kershaw counties
Prints in: the cover page and policies 4.2, 6.1, 8.1 and 8.2

Answer: _____

Q13. DPH license number

Optional.

Leave blank if you are still applying: the manual shows a space to write it in. The 5-day incident investigation report asks for it (R.60-122 §501.C).

Example: IHCP-0000
Prints in: 8 policies (including 1.1, 1.2, 1.4 and 1.5)

Answer: _____

Builder step: Services and clients

Q22. Your charges

Required.

Write it the way a client would read it. The service agreement discloses fees for all services (R.60-122 §601.B.2.b). These are your prices, not a state fee.

Example: $30.00 per hour, with a 3-hour minimum visit
Prints in: policy 4.2

Answer: _____

Q23. Days of written notice before you change a client's fees

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. The service agreement must include advance notice requirements for fee changes (R.60-122 §601.B.2.b).

Format: a whole number of up to three digits
Example: 30
If left blank, prints as: 30
Prints in: policy 4.2

Answer: _____

Q24. Days to return any money owed to a client after care ends

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. The refund policy says when money is forwarded to the client when care ends (R.60-122 §601.B.2.c).

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policies 3.3 and 4.2

Answer: _____

Q25. Days of written notice before you end a client's services

Pre-filled if left blank.

No rule sets this number for a single client. Choose one you can always meet, with exceptions for emergencies and safety. The service agreement sets out termination terms, including when a client may be refused further care (R.60-122 §601.B.2.d). Closing the agency needs at least 10 business days' written notice to every client (§502.C).

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policy 4.2

Answer: _____

Q26. Most a caregiver may hold of a client's money for one shopping trip

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

No rule sets a limit. Choose one that suits your clients. Receipts go to the client and client funds are accounted for in writing (R.60-122 §700.B.8).

Example: $100
If left blank, prints as: $100
Prints in: policies 5.1 and 5.3

Answer: _____

Builder step: People and dates

Q28. People who sign the license application

Required.

The owner or owners; for a corporation, two officers; DPH's form says the head of an LLC. Each signer needs a SLED check and a drug test with the initial application, must report disqualifying convictions to DPH immediately, and stays in the random drug testing pool (R.60-122 §103.F-H, §402.C).

Example: Morgan Ellis (member) and Riley Chen (member)
Prints in: the cover page and policies 1.2, 1.4, 2.2, 2.3, 2.4 and 7.2

Answer: _____

Q29. Administrator

Required.

Responsible for the overall management and operation of the agency (R.60-122 §401). The rule sets no qualifications. The administrator signs each policy review and every plan of correction (§301.B, §202.C). Report a change of administrator on DPH's online form.

Example: Jordan Lee
Prints in: the cover page and 29 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q30. Person who acts for the administrator when they are away

Required.

The rule names no alternate, but incidents must be reported within 24 hours or the next business day and DPH can arrive without notice, so the manual names this person in its incident, inspection and closure policies. Named in the incident, emergency and inspection policies.

Example: Casey Morgan
Prints in: 15 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q31. Person who receives and handles client complaints

Required.

R.60-122 has no complaints section. The manual adds a complaints procedure as recommended practice and tells clients about DPH's complaint line.

Example: Jordan Lee, Administrator
Prints in: policies 7.1 and 7.2

Answer: _____

Q32. Date your administrator adopts the manual

Required.

Policies must be accessible to staff, in print or electronically, at all times (R.60-122 §301.A).

Format: a date
Example: November 1, 2026
Prints in: the cover page and 7 policies (including 1.1, 4.1, 5.3 and 6.1)

Answer: _____

Q33. Next review date

Required.

No more than two years after the effective date. The administrator documents and signs each review. The provider sets a review period of no more than two years for all policies (R.60-122 §301.B).

Format: a date
Example: November 1, 2027
Prints in: the cover page and policies 1.1, 2.4 and 3.2

Answer: _____

Builder step: Hiring and how you'll operate

Q41. Background check company you use

Only asked, and then required, if Q35 is "A background check company that uses SLED or FBI records".

A private company may run the checks only if it uses current criminal records from SLED or the FBI (S.C. Code 44-7-2920).

Example: Sample Screening, Inc.
Prints in: policy 2.2

Answer: _____

Q42. Laboratory or collection vendor you use for drug tests

Only asked, and then required, if Q36 is not "With screening kits in the office".

With a lab, you keep the lab's results (R.60-122 §402.B-C). These are your vendor's prices, not a state fee.

Example: Sample Testing Services
Prints in: policy 2.3

Answer: _____

Q43. How often you run a random drug testing draw

Pre-filled if left blank.

No rule sets this. Choose a schedule you can always keep. The provider chooses the method and its policy must describe it (R.60-122 §402.C). DPH's application form asks for a copy of this policy with initial and renewal applications.

Example: Every calendar quarter
If left blank, prints as: Every calendar quarter
Prints in: policy 2.3

Answer: _____

Q44. Share of the pool tested at each draw (percent)

Pre-filled if left blank.

No rule sets this. Every caregiver and every application signer stays in the pool for every draw. Application signers and caregivers are subject to random drug testing (S.C. Code 44-70-70; R.60-122 §402.C).

Format: a whole number of up to three digits
Example: 25
If left blank, prints as: 25
Prints in: policy 2.3

Answer: _____

Q45. Outside training provider you use

Only asked, and then required, if Q38 is not "We train them ourselves".

Training comes from appropriate resources, for example licensed, registered or certified people, books or electronic media (R.60-122 §404). Training records are signed and dated by trainer and trainee.

Example: Sample Caregiver Academy
Prints in: policy 2.5

Answer: _____

Q46. Month each caregiver's yearly training is due by

Pre-filled if left blank.

The rule says before client contact and at least annually. Pick one way to track it. Eight topics, before client contact and at least annually (R.60-122 §404.A-H).

Example: The anniversary of their hire date
If left blank, prints as: The anniversary of their hire date
Prints in: policy 2.5

Answer: _____

Q47. Days to finish looking into a complaint

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet.

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policy 7.2

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	Where is your agency today?	Applying for a first license
Q2	What is your business?	An LLC
Q3	Where is your primary office?	In a commercially zoned area, with a county or municipal zoning permit
Q4	Will you operate from more than one office?	No, only the primary office
Q5	Does your business offer anything besides in-home care?	No
Q6	Agency name, as on your DPH license or application	Sample Home Care, LLC
Q7	Primary office address	100 Main Street, Suite 200, Columbia, SC 29201
Q8	Office phone	(803) 555-0100
Q9	Number caregivers call in an emergency or after hours	(803) 555-0199
Q10	Agency email address	office@samplehomecare.com
Q11	Office hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q12	South Carolina counties you serve	Richland, Lexington and Kershaw counties
Q13	DPH license number	IHCP-0000

Builder step: Services and clients

	Question	Sample answer
Q14	Who will pay for your clients' care?	Clients, families and private insurance
Q15	Who will you serve?	Adults only
Q16	Will you serve clients who live in a nursing home or community residential care facility?	No

	Question	Sample answer
Q17	Will caregivers help clients in and out of bed, chairs or vehicles?	Yes
Q18	Will caregivers give medication reminders?	Yes, reminders only
Q19	Will caregivers shop or run errands for clients?	Yes
Q20	Will caregivers drive clients?	No
Q21	Will you serve clients with dementia or other conditions that need specific care?	Yes
Q22	Your charges	$30.00 per hour, with a 3-hour minimum visit
Q23	Days of written notice before you change a client's fees	30
Q24	Days to return any money owed to a client after care ends	14
Q25	Days of written notice before you end a client's services	14
Q26	Most a caregiver may hold of a client's money for one shopping trip	$100

Builder step: People and dates

	Question	Sample answer
Q27	How often will you review your policies?	Every year
Q28	People who sign the license application	Morgan Ellis (member) and Riley Chen (member)
Q29	Administrator	Jordan Lee
Q30	Person who acts for the administrator when they are away	Casey Morgan
Q31	Person who receives and handles client complaints	Jordan Lee, Administrator
Q32	Date your administrator adopts the manual	November 1, 2026
Q33	Next review date	November 1, 2027

Builder step: Hiring and how you'll operate

	Question	Sample answer
Q34	How will your caregivers work for you?	All employees
Q35	How will you run criminal record checks?	SLED CATCH online
Q36	How will you run drug tests?	Through a laboratory or collection site

	Question	Sample answer
Q37	Who receives and reviews drug test results and health self-assessments?	The administrator
Q38	Who trains your caregivers?	We train them ourselves
Q39	How will you keep client and staff records?	Partly on paper and partly electronically
Q40	Include recommended practices?	Yes, include them
Q41	Background check company you use	Not asked with these answers
Q42	Laboratory or collection vendor you use for drug tests	Sample Testing Services
Q43	How often you run a random drug testing draw	Every calendar quarter
Q44	Share of the pool tested at each draw (percent)	25
Q45	Outside training provider you use	Not asked with these answers
Q46	Month each caregiver's yearly training is due by	The anniversary of their hire date
Q47	Days to finish looking into a complaint	14

What these answers do to the manual

- In 29 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.

Q1. Where is your agency today?

In Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk, the sample answer "Applying for a first license" prints:

> 10. The manual is adopted before Sample Home Care, LLC sends its license application. DPH will not issue an initial license until the applicant has shown that the proposed provider is in substantial compliance with the licensing standards (§103.B), and the rule's definition of an inspection includes a visit to a proposed provider (§102.L; Policy 1.4). The random drug testing policy (Policy 2.3, Drug testing: pre-employment and random) is also sent to DPH with the application (Policy 1.2).
>
> `Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk, sample answer`

The answer "Already licensed and updating to the May 22, 2026 rule" prints this instead:

> Because Sample Home Care, LLC was licensed before the rewritten R.60-122 took effect on May 22, 2026, this policy also holds the checklist of what changed on that date and the plan for bringing current clients' and staff members' paperwork up to the new rule.
>
> `Policy 1.1 Policies and procedures: adoption, staff access, two-year review and the R.60-122 crosswalk, other answer`

Q34. How will your caregivers work for you?

In Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation, the sample answer "All employees" prints:

> 10. All of Sample Home Care, LLC's caregivers are its employees. Before it uses independent contractors, caregivers it refers, or workers supplied by a staffing agency, the administrator asks the insurance carrier, in writing, how the coverage would treat them, and revises this policy.
>
> `Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation, sample answer`

The answer "Also independent contractors or caregivers we refer" prints this instead:

> 10. Sample Home Care, LLC also uses independent contractors or caregivers it refers. Whether workers' compensation covers them depends on the law and the policy, not on what the agency calls them. The administrator asks the insurance carrier, in writing, how the policy treats each group of workers the agency uses, keeps the answer with the insurance register, and adds coverage where the carrier says it is needed.
>
> `Policy 1.5 Liability insurance or surety bond, indemnity coverage and workers' compensation, other answer`

See it printed. The free sample policy uses exactly these answers: Policy 7.1, Rights and assurances, as it prints in the South Carolina manual: https://www.carerulebook.com/samples/us-south-carolina-home-care.pdf