CARERULEBOOK TEXAS MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Texas manual builder asks: 7 decisions and 12 details, 19 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/texas/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 [Place of business 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

- Alternate administrator
- Supervising nurse (RN), if you have one

PART 1

Part 1. Decisions to settle first

These 7 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: How you'll operate

Q12. Do you drug test employees who have direct contact with clients?

The rules let you choose, but your policy must say which. Anyone applying for services gets a copy.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of Policy 3.5 Drug testing.

Q13. If you drug test, when do you test?

Your policy must describe how you test. If you answered no above, skip this.

☐ Before hiring only (builder default)
☐ Before hiring, and on reasonable suspicion

What it changes:

- Changes the wording of Policy 3.5 Drug testing.

Q14. Will you use volunteers?

☐ No (builder default)
☐ Yes

What it changes:

- Policy 3.4 Use of volunteers applies only when Q14 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.

Q15. Will you use independent contractors or staff from another agency?

☐ No (builder default)
☐ Yes

What it changes:

- Policy 1.7 Independent contractors and arranged services applies only when Q15 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.

Q16. How many registered nurses will you employ?

Agencies with two or more RNs need a workplace violence prevention program.

☐ None (builder default)
☐ One
☐ Two or more

What it changes:

- Policy 11.1 Workplace violence prevention applies only when Q16 is "Two or more". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of Policy 2.6 Client care practices.

Q17. Will attendants help with tube feeding through a gastrostomy tube (g-tube)?

Only after the training and competency program the rules require. Your advance directive statement depends on this answer.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 4 policies:
  - Policy 2.5 Advance directives
  - Policy 2.6 Client care practices
  - Policy 4.1 Orientation, job training and competency
  - Policy 5.3 RN delegation of health-related tasks

Q18. Include recommended practices?

Some policies end with practical steps that go beyond the rules. Once you adopt them, a surveyor 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 35 policies. Once adopted, recommended practices are the agency's own commitments, so only keep them if the agency will follow them.

Also decide: commitments you write in Part 2

These details are commitments too: the manual prints them as what the agency will do, and the regulator can check that it does. Agree them at the same time.

- Q5. Office operating hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q19. Days from signed service plan to start of care (pre-filled: 14)

PART 2

Part 2. Agency details

These 12 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q1. Agency legal name

Required.

Your agency's full legal name, as it appears on your license application, including LLC or Inc. It goes on the cover and throughout the manual.

Example: Sample Home Care Agency, LLC
Prints in: the cover page and 35 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q2. Place of business address

Required.

The physical office where you run the agency and keep records. HHSC surveyors come here for inspections, and the manual's closed-office and survey policies refer to it.

Example: 100 Example Street, Suite 200, Austin, TX 78701
Prints in: the cover page and policy 10.1

Answer: _____

Q3. Main office phone

Required.

The number clients, staff and HHSC call to reach your office during operating hours. If it changes, you report the change to HHSC within 7 days (Policy 1.1).

Format: a full phone number, with area code
Example: (512) 555-0100
Prints in: policies 2.2, 6.1 and 8.1

Answer: _____

Q4. After-hours phone for clients and staff

Required.

The number clients and staff call when the office is closed. Every client must be told how to get care after business hours, and this number is left in each client's home (Policy 5.5).

Format: a full phone number, with area code
Example: (512) 555-0199
Prints in: policies 2.6, 5.4, 5.5 and 6.1

Answer: _____

Q5. Office operating hours

Pre-filled if left blank.

The hours your office is open. The rules require a written policy stating your operating hours, and a notice and voicemail whenever the office is closed during them (26 TAC §558.210). Report a change to HHSC within 7 days.

Format: days and times
Example: Monday to Friday, 8:00 a.m. to 5:00 p.m.
If left blank, prints as: Monday to Friday, 8:00 a.m. to 5:00 p.m.
Prints in: policies 1.1, 1.3 and 5.5

Answer: _____

Q6. Counties you serve

Required.

The counties on your license application. Type a name and pick it from the list; add as many as you serve. The counties where you will serve clients, as on your license application. Your admission policy and your emergency plan's risk assessment cover these counties.

Format: one or more counties, picked from the builder's list
Example: Travis and Williamson counties
Prints in: policies 2.4, 5.7 and 8.1

Answer: _____

Builder step: People and dates

Q7. Administrator

Required.

The person who runs the agency day to day. They must meet the qualifications in 26 TAC §558.244 and complete the required training before being designated (Policies 1.3 and 4.2).

Example: Alex Rivera
Prints in: the cover page and policies 1.2, 1.3, 2.2, 2.6 and 4.2

Answer: _____

Q8. Alternate administrator

Required.

The person who acts for the administrator when they are not available. They must meet the same qualifications and training requirements (Policy 1.3).

Example: Morgan Chen
Prints in: the cover page and policies 1.2, 1.3 and 4.2

Answer: _____

Q9. Supervising nurse (RN), if you have one

Optional.

Only if you employ a registered nurse. A personal assistance services agency does not need one, but an RN is needed to assess clients for health-related tasks and delegate them (Policy 5.3). Leave blank if you have no RN.

Example: Taylor Brooks, RN
Prints in: policy 2.6

Answer: _____

Q10. Date you adopt the manual

Required.

The date your agency adopts these policies. Your administrator signs and dates the manual on this day, and every policy shows it.

Format: a date
Example: November 1, 2026
Prints in: the cover page and policy 3.1

Answer: _____

Q11. Next review date

Required.

Usually one year after you adopt the manual. We fill this in when you pick the adoption date. When you will next review the whole manual. We suggest one year after adoption, and sooner whenever we tell you a rule has changed.

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

Answer: _____

Builder step: How you'll operate

Q19. Days from signed service plan to start of care

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your promised maximum number of days from a signed service plan to the first visit. No rule sets this number, and HHSC holds you to what your policy says, so pick 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 2.4

Answer: _____

PART 3

Part 3. Sample completed questionnaire

This is the questionnaire filled in for Sample Home Care, LLC, a fictional agency, with the builder's example answers and default choices. It is an illustration of the format, not a recommendation: every agency's answers will differ.

Builder step: Your agency

	Question	Sample answer
Q1	Agency legal name	Sample Home Care, LLC
Q2	Place of business address	100 Example Street, Suite 200, Austin, TX 78701
Q3	Main office phone	(512) 555-0100
Q4	After-hours phone for clients and staff	(512) 555-0199
Q5	Office operating hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q6	Counties you serve	Travis and Williamson counties

Builder step: People and dates

	Question	Sample answer
Q7	Administrator	Alex Rivera
Q8	Alternate administrator	Morgan Chen
Q9	Supervising nurse (RN), if you have one	Taylor Brooks, RN
Q10	Date you adopt the manual	November 1, 2026
Q11	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q12	Do you drug test employees who have direct contact with clients?	No
Q13	If you drug test, when do you test?	Before hiring only
Q14	Will you use volunteers?	No
Q15	Will you use independent contractors or staff from another agency?	No
Q16	How many registered nurses will you employ?	None
Q17	Will attendants help with tube feeding through a gastrostomy tube (g-tube)?	No
Q18	Include recommended practices?	Yes, include them

	Question	Sample answer
Q19	Days from signed service plan to start of care	14

What these answers do to the manual

- Policy 3.4 Use of volunteers prints as "Not applicable", because it applies only when Q14 is "Yes".
- Policy 1.7 Independent contractors and arranged services prints as "Not applicable", because it applies only when Q15 is "Yes".
- Policy 11.1 Workplace violence prevention prints as "Not applicable", because it applies only when Q16 is "Two or more".
- In 5 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.

Q17. Will attendants help with tube feeding through a gastrostomy tube (g-tube)?

In Policy 2.6 Client care practices, the sample answer "No" prints:

> 5. **Gastrostomy tube (g-tube).** Sample Home Care, LLC's attendants do not do g-tube feeding or give medication through a g-tube, so the g-tube training and competency program in §558.404(h) is not used (Policy 4.1).
>
> `Policy 2.6 Client care practices, sample answer`

The answer "Yes" prints this instead:

> - for a client who receives g-tube feedings or medication through a g-tube, a copy of the current regime, including conditions specific to the client.
>
> `Policy 2.6 Client care practices, other answer`

Q12. Do you drug test employees who have direct contact with clients?

In Policy 3.5 Drug testing, the sample answer "No" prints:

> - Sample Home Care, LLC does not conduct drug testing of its employees.
>
> `Policy 3.5 Drug testing, sample answer`

The answer "Yes" prints this instead:

> - **Results:** each result is kept confidential and filed apart from the rest of the personnel record.
>
> `Policy 3.5 Drug testing, other answer`

Q14. Will you use volunteers?

Policy 3.4 Use of volunteers prints in full only when Q14 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC does not use volunteers. If it decides to use volunteers, it will adopt this policy before any volunteer starts.
>
> `Policy 3.4 Use of volunteers, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 6.1, Reporting abuse, neglect and exploitation, as it prints in the Texas manual: https://www.carerulebook.com/samples/us-texas-home-care.pdf