CARERULEBOOK VIRGINIA MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Virginia manual builder asks: 6 decisions and 12 details, 18 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/virginia/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. 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
- Person who acts for the administrator when they are absent
- Registered nurse who supervises personal care

PART 1

Part 1. Decisions to settle first

These 6 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

Q13. Will home attendants help clients with medication?

Personal care can include administering normally self-administered drugs as § 54.1-3408 allows. If you offer it, you need a medication management policy (12VAC5-381-180 C 7; -360 B 2).

☐ Yes, normally self-administered medication, as Virginia law allows (builder default)
☐ No

What it changes:

- Policy 5.3 Medication management applies only when Q13 is "Yes, normally self-administered medication, as Virginia law allows". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 6 policies:
  - Policy 2.3 Acceptance of clients for service
  - Policy 2.4 Discharge and reduction of services
  - Policy 3.1 Personnel qualifications and job descriptions
  - Policy 4.1 Orientation, job training and competency
  - Policy 5.1 Initial assessment and plan of care
  - Policy 5.2 Personal care services and home attendant duties

Q14. Will you drug test employees?

Your personnel policies must cover maintaining a drug-free workplace (12VAC5-381-180 E 6). Testing is your choice; if you test, the policy says when.

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 2 policies:
  - Policy 3.5 Drug testing
  - Policy 3.6 Reporting licensed staff to their licensing boards

Q15. Will any services be provided by contractors rather than employees?

Services not provided by employees need a written agreement with the items in 12VAC5-381-220.

☐ No (builder default)
☐ Yes

What it changes:

- Policy 1.4 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.
- Changes the wording of 9 policies:
  - Policy 1.2 Organizational structure and lines of authority
  - Policy 1.3 Surveyor entry and survey cooperation
  - Policy 1.5 Financial controls, billing and refunds
  - Policy 1.6 Malpractice and liability insurance
  - Policy 3.1 Personnel qualifications and job descriptions
  - Policy 3.2 Personnel records
  - Policy 3.4 Criminal history checks and registry searches
  - Policy 5.1 Initial assessment and plan of care
  - Policy 5.6 Service records: completion and return

Q16. Will you use telemonitoring?

For example, remote check-ins or monitoring devices in the client's home (12VAC5-381-180 C 17).

☐ No (builder default)
☐ Yes

What it changes:

- Policy 5.4 Telemonitoring applies only when Q16 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 4 policies:
  - Policy 2.3 Acceptance of clients for service
  - Policy 2.4 Discharge and reduction of services
  - Policy 2.6 Informed consent and advance directives, including DDNR orders
  - Policy 5.1 Initial assessment and plan of care

Q17. Will you have a drop site?

A location staff use for daily tasks such as getting supplies, using fax and copy machines, charting and storing client records, also called a charting station or workstation. It must not have staff assigned, accept referrals or be advertised (12VAC5-381-10; -270).

☐ No (builder default)
☐ Yes

What it changes:

- Policy 5.7 Drop sites applies only when Q17 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 2 policies:
  - Policy 2.3 Acceptance of clients for service
  - Policy 10.1 Client records: content and handling

Q18. Include recommended practices?

Some policies end with practical steps that go beyond the rules. Virginia requires you to comply with your own policies, so leave them out if you won't follow them.

☐ 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. Posted business hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)

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 organization

Q1. Organization legal name

Required.

Your organization's full legal name, as registered with the Virginia State Corporation Commission and on your OLC license application, including LLC or Inc.

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

Answer: _____

Q2. Office address

Required.

The address on your license. Tell the OLC 30 days before changing your mailing address (12VAC5-381-150 E).

Example: 100 Main Street, Suite 200, Richmond, VA 23219
Prints in: the cover page and policies 1.1, 2.1, 2.2, 5.7, 5.8 and 10.1

Answer: _____

Q3. Office phone

Required.

Clients get this number as the organization's contact for complaints (12VAC5-381-240 C).

Format: a full phone number, with area code
Example: (804) 555-0100
Prints in: 11 policies (including 2.1, 2.2, 2.3 and 2.4)

Answer: _____

Q4. 24-hour on-call phone

Required.

Virginia requires services on an on-call basis 24 hours a day, seven days a week, and an RN or LPN available whenever personal care is being given (12VAC5-381-150 I; -360 F).

Format: a full phone number, with area code
Example: (804) 555-0199
Prints in: 16 policies (including 1.1, 1.2, 1.4 and 2.1)

Answer: _____

Q5. Posted business hours

Pre-filled if left blank.

The organization must have regular posted business hours and be fully operational during them (12VAC5-381-150 I).

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: 9 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q6. Counties and cities you serve

Required.

Your service area. Tell the OLC 30 days before changing it (12VAC5-381-150 E).

Format: one or more places, picked from the builder's list
Example: Henrico County, Chesterfield County and the City of Richmond
Prints in: policies 1.1, 2.3, 2.4, 4.1 and 8.1

Answer: _____

Builder step: People and dates

Q7. Governing body

Required.

The person or group legally responsible for the organization's management, operation and finances, which approves your policies every year (12VAC5-381-160).

Example: the members of Sample Home Care, LLC
Prints in: the cover page and 12 policies (including 1.1, 1.2, 1.4 and 1.5)

Answer: _____

Q8. Administrator

Required.

At least one year of training and experience in direct health care, with at least one year in the last five of supervisory or management experience in home health care or a related program (12VAC5-381-170 A).

Example: Jordan Lee
Prints in: the cover page and 35 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q9. Person who acts for the administrator when they are absent

Required.

This person must be able to perform the administrator's duties (12VAC5-381-170 C).

Example: Taylor Brooks
Prints in: 10 policies (including 1.1, 1.2, 1.3 and 2.2)

Answer: _____

Q10. Registered nurse who supervises personal care

Required.

Virginia requires you to designate an RN responsible for supervising personal care services. The RN develops each client's plan of services and supervises at least every 90 days (12VAC5-381-360).

Example: Morgan Reyes, RN
Prints in: the cover page and 31 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q11. Date you adopt the manual

Required.

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

Answer: _____

Q12. Next review date

Required.

Virginia requires every policy to be reviewed at least annually (12VAC5-381-180 B), so set this no more than a year after adoption.

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 organization

	Question	Sample answer
Q1	Organization legal name	Sample Home Care, LLC
Q2	Office address	100 Main Street, Suite 200, Richmond, VA 23219
Q3	Office phone	(804) 555-0100
Q4	24-hour on-call phone	(804) 555-0199
Q5	Posted business hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q6	Counties and cities you serve	Henrico County, Chesterfield County and the City of Richmond

Builder step: People and dates

	Question	Sample answer
Q7	Governing body	the members of Sample Home Care, LLC
Q8	Administrator	Jordan Lee
Q9	Person who acts for the administrator when they are absent	Taylor Brooks
Q10	Registered nurse who supervises personal care	Morgan Reyes, RN
Q11	Date you adopt the manual	November 1, 2026
Q12	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q13	Will home attendants help clients with medication?	Yes, normally self-administered medication, as Virginia law allows
Q14	Will you drug test employees?	No
Q15	Will any services be provided by contractors rather than employees?	No

	Question	Sample answer
Q16	Will you use telemonitoring?	No
Q17	Will you have a drop site?	No
Q18	Include recommended practices?	Yes, include them

What these answers do to the manual

- Policy 1.4 Independent contractors and arranged services prints as "Not applicable", because it applies only when Q15 is "Yes".
- Policy 5.4 Telemonitoring prints as "Not applicable", because it applies only when Q16 is "Yes".
- Policy 5.7 Drop sites prints as "Not applicable", because it applies only when Q17 is "Yes".
- In 17 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.

Q13. Will home attendants help clients with medication?

In Policy 4.1 Orientation, job training and competency, the sample answer "Yes, normally self-administered medication, as Virginia law allows" prints:

> For home attendants, it also includes the organization's medication management policy (Policy 5.3).
>
> `Policy 4.1 Orientation, job training and competency, sample answer`

The answer "No" prints this instead:

> - Include in orientation that home attendants do not handle clients' medication, and what to do if a client asks for help with it.
>
> `Policy 4.1 Orientation, job training and competency, other answer`

Q14. Will you drug test employees?

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

> 2. **Deciding what happens next.** The administrator meets with the employee, reviews the supervisor's record, decides on further action, and records the decision.
>
> `Policy 3.5 Drug testing, sample answer`

The answer "Yes" prints this instead:

> - **Administrator (Jordan Lee):** keeps this policy current; makes sure every employee receives it at orientation; decides on action when there is a concern; arranges tests, receives results and keeps them confidential; reports positive results to health regulatory boards.
>
> `Policy 3.5 Drug testing, other answer`

Q15. Will any services be provided by contractors rather than employees?

Policy 1.4 Independent contractors and arranged services prints in full only when Q15 is "Yes". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC provides all services through its own employees. If it decides to use contractors, it will adopt this policy, and sign a written agreement meeting 12VAC5-381-220, before any contracted service starts.
>
> `Policy 1.4 Independent contractors and arranged services, 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 Virginia manual: https://www.carerulebook.com/samples/us-virginia-home-care.pdf