CARERULEBOOK WASHINGTON MANUAL

Intake questionnaire

This questionnaire lists every question the CareRulebook Washington manual builder asks: 25 decisions and 24 details, 49 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/washington/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: Choose at least one service you will provide. 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 in Washington]) 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:

- Area agency on aging or DSHS office you contract with
- Owner or governing body that adopts the manual
- Administrator
- Alternate administrator
- Supervisor of direct care services
- Alternate supervisor of direct care services
- Person who orients workers and checks their skills

PART 1

Part 1. Decisions to settle first

These 25 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. Will you have more than one office?

Tell DOH in writing within 30 days of opening or closing an office (WAC 246-335-335(5)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 3 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.3 Policies and procedures: adoption, access, review and updates
  - Policy 1.7 License, office, insurance, renewal, changes and closing
- Decides whether the builder asks Q11.

Q2. Do you have a DSHS or area agency on aging (AAA) home care contract?

DSHS does not contract with newly licensed agencies: its home care agency application asks for three years as a licensed Washington agency. Most new agencies start private pay.

☐ No (private pay) (builder default)
☐ Yes

What it changes:

- Changes the wording of 10 policies:
  - Policy 1.6 Emergency preparedness
  - Policy 1.7 License, office, insurance, renewal, changes and closing
  - Policy 2.1 Referral, admission and start of services
  - Policy 2.2 Transfer and discharge
  - Policy 2.11 Nurse delegation and vital signs that guide medication: not offered
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 3.5 Keeping and disposing of records
  - Policy 4.3 Background checks and disclosure statements
  - Policy 5.1 Mandatory reporting: abuse, neglect, exploitation, abandonment and rule noncompliance
- Decides whether the builder asks Q12.

Builder step: Services and charges

Q13. Will you provide personal care?

Help with activities of daily living such as bathing, dressing, eating, toileting, personal hygiene, moving around and transfers (WAC 246-335-310(1)). One of the services on DOH's application.

☐ Yes (builder default)
☐ No

What it changes:

- Policy 2.10 Passive range of motion exercises for maintenance applies only when Q21 is "Yes, for maintenance only, following the client's plan from a therapist or nurse" and Q13 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 12 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.3 Policies and procedures: adoption, access, review and updates
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 2.4 Medication self-administration with assistance
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 3.4 Client records: contents, filing, confidentiality and release
  - Policy 4.1 Hiring: employment criteria, references and credential checks
  - Policy 4.2 Job descriptions

    - Policy 4.5 Orientation, skills verification and ongoing training
    - Policy 4.6 Caregiver training and home care aide certification
    - Policy 6.4 Bloodborne pathogens and Hepatitis B vaccine
- Decides whether the builder asks Q19, Q20 and Q21.

Q14. Will you provide housework?

Ordinary housework such as dishes, dusting, vacuuming, laundry, making beds and taking out the garbage (WAC 246-335-310(18)(b)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 6 policies:
    - Policy 1.1 Plan of operation and management across approved counties
    - Policy 2.3 Home care services and the tasks workers do and do not do
    - Policy 3.1 Client bill of rights
    - Policy 3.2 Plan of care and one-time visits
    - Policy 4.2 Job descriptions
    - Policy 4.5 Orientation, skills verification and ongoing training

Q15. Will you provide essential shopping?

Local trips, with the client or for them, for food, medical necessities and household items they need (WAC 246-335-310(18)(c)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 7 policies:
    - Policy 1.1 Plan of operation and management across approved counties
    - Policy 2.3 Home care services and the tasks workers do and do not do
    - Policy 3.1 Client bill of rights
    - Policy 3.2 Plan of care and one-time visits
    - Policy 4.2 Job descriptions
    - Policy 4.5 Orientation, skills verification and ongoing training
    - Policy 5.2 Worker conduct: gifts, money, powers of attorney and photos

Q16. Will you provide travel to medical services?

Driving the client, or going with them by bus or taxi, to a local doctor's office or clinic (WAC 246-335-310(18)(e)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 7 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 4.1 Hiring: employment criteria, references and credential checks
  - Policy 4.2 Job descriptions
  - Policy 4.5 Orientation, skills verification and ongoing training

Q17. Will you provide meal preparation?

Planning meals, cooking, setting out food and cleaning up afterwards (WAC 246-335-310(18)(a)).

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 8 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 4.2 Job descriptions
  - Policy 4.5 Orientation, skills verification and ongoing training
  - Policy 4.8 Personnel, contractor and volunteer records
  - Policy 6.5 Food safety
- Decides whether the builder asks Q25.

Q18. Will you provide family respite care?

Care that gives a family caregiver a break. One of the services on DOH's application.

☐ Yes (builder default)
☐ No

What it changes:

- Changes the wording of 6 policies:
  - Policy 1.1 Plan of operation and management across approved counties

- Policy 2.3 Home care services and the tasks workers do and do not do
- Policy 3.1 Client bill of rights
- Policy 3.2 Plan of care and one-time visits
- Policy 4.2 Job descriptions
- Policy 4.5 Orientation, skills verification and ongoing training

Q19. Which clients will workers help move between bed, chair, toilet and tub?

Only asked if Q13 is "Yes".

Transfers of clients who cannot assist, or who need assistive devices, are home care tasks only after specific training or skills verification under your policies (WAC 246-335-310(1)(j)).

☐ Only clients who can help with their own transfer, without a device (builder default)
☐ Also clients who cannot help or who need a device such as a gait belt or lift, once the worker is trained and their skills checked

What it changes:

- Changes the wording of 2 policies:
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 4.5 Orientation, skills verification and ongoing training

Q20. How will workers help clients take their own medications?

Only asked if Q13 is "Yes".

This is medication self-administration with assistance (WAC 246-335-310(22); WAC 246-945-714). Workers help only a client who knows they are taking medication, right before they take it (WAC 246-945-718), and never give an injection (WAC 246-945-714(3)).

☐ They will not help with medications
☐ Reminding or coaching, handing over the container and opening it (builder default)
☐ Also using an enabler, placing the medication in the client's hand, setting up a diabetic device and handing over an injectable medication for the client to use themselves

What it changes:

- Changes the wording of 6 policies:
  - Policy 2.4 Medication self-administration with assistance
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 3.4 Client records: contents, filing, confidentiality and release
  - Policy 4.2 Job descriptions
  - Policy 4.5 Orientation, skills verification and ongoing training

Q21. Will workers help with passive range of motion exercises?

Only asked if Q13 is "Yes".

Needs a copy of the client's exercise plan from a physical therapist, occupational therapist or qualified RN, dated within 12 months and saying maintenance only, and a documented skills check for each worker first (WAC 246-335-420(13)).

☐ No (builder default)
☐ Yes, for maintenance only, following the client's plan from a therapist or nurse

What it changes:

- Policy 2.10 Passive range of motion exercises for maintenance applies only when Q21 is "Yes, for maintenance only, following the client's plan from a therapist or nurse" and Q13 is "Yes". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 6 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.3 Policies and procedures: adoption, access, review and updates
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 4.5 Orientation, skills verification and ongoing training

Q22. Will workers help clients take their own vital signs, for information only?

For example handing over a digital thermometer or putting on a blood pressure cuff (WAC 246-335-420(12)(a)). Readings that decide whether or how much medication a client takes need a contracted registered nurse; this manual does not cover that.

☐ No (builder default)
☐ Yes, with digital devices, passing the readings to the client or family

What it changes:

- Policy 2.9 Help taking vital signs, for information only applies only when Q22 is "Yes, with digital devices, passing the readings to the client or family". Otherwise it prints as a one-line "Not applicable" statement, so numbering stays the same.
- Changes the wording of 7 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.3 Policies and procedures: adoption, access, review and updates
  - Policy 2.3 Home care services and the tasks workers do and do not do
  - Policy 2.11 Nurse delegation and vital signs that guide medication: not offered
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits

- Policy 4.5 Orientation, skills verification and ongoing training

Q23. Will you provide one-time visits?

For a single visit you may keep shorter written records instead of a full plan of care (WAC 246-335-440(5)).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 2.1 Referral, admission and start of services
  - Policy 3.1 Client bill of rights
  - Policy 3.2 Plan of care and one-time visits
  - Policy 3.4 Client records: contents, filing, confidentiality and release

Q24. Will you serve clients under 18?

Records of minors are kept longer (WAC 246-335-450(7)), and suspected abuse or neglect of a child is reported under RCW 26.44.030.

☐ Not usually (services are designed for adults) (builder default)
☐ Yes

What it changes:

- Changes the wording of 5 policies:
  - Policy 2.1 Referral, admission and start of services
  - Policy 2.6 Client medical emergencies and death of a client
  - Policy 3.1 Client bill of rights
  - Policy 3.5 Keeping and disposing of records
  - Policy 5.1 Mandatory reporting: abuse, neglect, exploitation, abandonment and rule noncompliance

Q25. Will workers prepare food for clients on their own?

Only asked if Q17 is "Yes".

Workers who prepare food for clients on their own need a food worker card, equivalent FDA food safety training, or home care aide certification (WAC 246-335-430(8)).

☐ Yes (builder default)
☐ No, they only help clients who prepare their own food

What it changes:

- Changes the wording of 3 policies:

  - Policy 4.2 Job descriptions
  - Policy 4.8 Personnel, contractor and volunteer records
  - Policy 6.5 Food safety

Builder step: How you'll operate

Q37. Will any caregivers work as self-employed contractors?

Contractors need a written contract, meet the same rules as employees and are evaluated every year (WAC 246-335-425(4), (14)). Check Washington's employment tests with a lawyer before using contractors.

☐ No, all caregivers are employees (builder default)
☐ Yes

What it changes:

- Changes the wording of 11 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.5 Contractors, volunteers and students
  - Policy 3.3 Supervisor of direct care services and supervision of care
  - Policy 4.1 Hiring: employment criteria, references and credential checks
  - Policy 4.2 Job descriptions
  - Policy 4.3 Background checks and disclosure statements
  - Policy 4.5 Orientation, skills verification and ongoing training
  - Policy 4.7 Annual performance and contractor evaluations
  - Policy 4.8 Personnel, contractor and volunteer records
  - Policy 6.2 Tuberculosis program
  - Policy 6.4 Bloodborne pathogens and Hepatitis B vaccine

Q38. Will you use volunteers or students?

Volunteers and students who have contact with clients need the same background checks, orientation and evaluations as staff (WAC 246-335-425).

☐ No (builder default)
☐ Yes

What it changes:

- Changes the wording of 12 policies:
  - Policy 1.1 Plan of operation and management across approved counties
  - Policy 1.5 Contractors, volunteers and students
  - Policy 2.7 Back-up care when a visit cannot happen as scheduled
  - Policy 3.3 Supervisor of direct care services and supervision of care

- Policy 4.1 Hiring: employment criteria, references and credential checks
- Policy 4.2 Job descriptions
- Policy 4.3 Background checks and disclosure statements
- Policy 4.5 Orientation, skills verification and ongoing training
- Policy 4.7 Annual performance and contractor evaluations
- Policy 4.8 Personnel, contractor and volunteer records
- Policy 6.2 Tuberculosis program
- Policy 6.4 Bloodborne pathogens and Hepatitis B vaccine

Q39. How will your caregivers get the 75 hours of required training?

Long-term care workers complete 75 hours of DSHS-approved training within 120 days of hire, 5 of them before giving any care (RCW 74.39A.074), and most must become certified home care aides (chapter 18.88B RCW).

☐ We hire some untrained caregivers and arrange DSHS-approved training for them (builder default)
☐ We hire only caregivers who have completed it, or who are exempt

What it changes:

- Changes the wording of 2 policies:
  - Policy 4.1 Hiring: employment criteria, references and credential checks
  - Policy 4.6 Caregiver training and home care aide certification
- Decides whether the builder asks Q47.

Q40. How will you verify a new worker's skills before they work alone?

WAC 246-335-425(9) gives written tests, skills observation and evidence of previous training as examples. The manual includes a skills checklist, and a test with answers if you choose one.

☐ Watch them do each task they will do, and check their training records (builder default)
☐ Also a short written test on our policies

What it changes:

- Changes the wording of 2 policies:
  - Policy 4.5 Orientation, skills verification and ongoing training
  - Policy 4.8 Personnel, contractor and volunteer records

Q41. Who answers calls when the office is closed?

The supervisor or a designee must be available during all hours of client care (WAC 246-335-445(4)).

☐ The supervisor of direct care services, or the alternate when the supervisor is unavailable (builder default)
☐ The supervisor, alternate and other designated staff, on a written schedule

What it changes:

- Changes the wording of 2 policies:
  - Policy 3.1 Client bill of rights
  - Policy 3.3 Supervisor of direct care services and supervision of care

Q42. How will the supervisor make the six-month client contact?

The supervisor contacts each client by phone or visit at least every six months to check the plan of care is followed and the client is satisfied, and documents it (WAC 246-335-445(6)).

☐ By phone or visit, whichever suits the client (builder default)
☐ By visit

What it changes:

- Changes the wording of Policy 3.3 Supervisor of direct care services and supervision of care.

Q43. How will you assess client satisfaction?

Your quality improvement program needs a system to assess client satisfaction with your overall services (WAC 246-335-455(3)).

☐ At each six-month supervisor contact
☐ At each six-month contact, plus a yearly written survey (builder default)

What it changes:

- Changes the wording of Policy 7.3 Client satisfaction.

Q44. Which TB test will employees take when DOH's risk form says to test?

Every new employee completes DOH's adult TB risk assessment form, and is tested if the form says so (WAC 246-335-425(12)(c)). Each year employees are reassessed for new risk factors.

☐ A skin test or a blood test, with a blood test for people born outside the US, as DOH's form prefers (builder default)
☐ A blood test (IGRA) for everyone who needs testing

What it changes:

- Changes the wording of Policy 6.2 Tuberculosis program.

Q45. How will you keep records?

Client records are legible in permanent ink or retrievable electronically, kept in your office for DOH, and fastened together if on paper (WAC 246-335-450(2)).

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

What it changes:

- Changes the wording of 5 policies:
  - Policy 1.3 Policies and procedures: adoption, access, review and updates
  - Policy 3.2 Plan of care and one-time visits
  - Policy 3.4 Client records: contents, filing, confidentiality and release
  - Policy 3.5 Keeping and disposing of records
  - Policy 4.8 Personnel, contractor and volunteer records

Q46. Include recommended practices?

Some policies end with practical steps that go beyond the rules, such as worker gift limits and keeping a copy of each training certificate. Once adopted they are your policies and DOH can expect you to follow them, so leave them out if you won't. The DOH review copy always leaves them out.

☐ 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 37 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.

- Q7. Office hours (pre-filled: Monday to Friday, 8:00 a.m. to 5:00 p.m.)
- Q29. Education and experience your administrator must have (pre-filled: A high school diploma or equivalent and at least two years of experience in home care, health care or business management, including one year supervising staff)
- Q32. Education and experience your supervisor must have (pre-filled: Current Washington certification as a home care aide or nursing assistant, or a higher health care credential, and at least one year of experience giving or supervising personal care)
- Q48. Days to finish investigating a complaint (pre-filled: 14)
- Q49. Days to file visit notes in the client record (pre-filled: 7)

PART 2

Part 2. Agency details

These 24 answers fill in the names, contacts, dates and numbers the manual prints. Write each answer exactly as it should appear.

Builder step: Your agency

Q3. Agency legal name

Required.

Exactly as on your DOH license application and your Washington business license (UBI), including LLC or Inc. Only a licensed agency may use "home care" in its name or advertising, and a home care agency may not advertise home health or hospice services (RCW 70.127.030).

Example: Sample Home Care, LLC
Prints in: the cover page and 42 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q4. Office address in Washington

Required.

A licensed agency keeps at least one office in Washington where its records are kept, and displays its license there (WAC 246-335-335). The rules do not say whether the office may be in your home; ask DOH first if you plan that.

Example: 100 Main Street, Suite 200, Tacoma, WA 98402
Prints in: the cover page and 10 policies (including 1.1, 1.3, 1.7 and 2.1)

Answer: _____

Q5. Office phone

Required.

Printed in the client bill of rights as the number to call to make a complaint to the agency (WAC 246-335-435(17)).

Format: a full phone number, with area code
Example: (253) 555-0100
Prints in: 15 policies (including 1.1, 1.6, 2.1 and 2.2)

Answer: _____

Q6. Phone clients and workers call when the office is closed

Required.

The supervisor of direct care services, or their designee, must be available during all hours when clients are receiving care (WAC 246-335-445(4)). It can be the office number if calls are forwarded.

Format: a full phone number, with area code
Example: (253) 555-0199
Prints in: the cover page and 15 policies (including 1.1, 1.6, 2.2 and 2.3)

Answer: _____

Q7. Office hours

Pre-filled if left blank.

Your plan of operation states the days and hours the agency operates (WAC 246-335-415(5)). Policies must be available to staff during these hours (WAC 246-335-415(11)(n)).

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, 3.1, 3.3 and 7.2

Answer: _____

Q8. Days and hours clients can receive care

Required.

For example "7 days a week, 24 hours a day" if you offer overnight and live-in care. Printed in your plan of operation next to your office hours. A supervisor or designee must be reachable throughout these hours (WAC 246-335-445(4)).

Example: 7 days a week, 7:00 a.m. to 10:00 p.m.
Prints in: policies 1.1 and 3.3

Answer: _____

Q9. Counties DOH has approved, or you are applying for

Required.

DOH approves each county separately. Your plan of operation says how intake, supervision, evaluations and quality improvement work in every approved county (WAC 246-335-415(6)), and you need DOH's approval of an amended application before serving a new county (WAC 246-335-335(6)). Each county after the first adds a DOH fee.

Format: one or more counties, picked from the builder's list
Example: Pierce and King counties
Prints in: 13 policies (including 1.1, 1.4, 1.6 and 2.1)

Answer: _____

Q10. DOH license number

Optional.

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

Example: IHS.FS.60000000
Prints in: policies 1.2, 1.4, 1.7 and 1.8

Answer: _____

Q11. Your other office addresses

Only asked, and then required, if Q1 is "Yes".

You tell DOH in writing within 30 days of opening or closing an office (WAC 246-335-335(5)). Records stay available at the office DOH knows about.

Example: 200 Pine Street, Everett, WA 98201
Prints in: policies 1.1 and 1.7

Answer: _____

Q12. Area agency on aging or DSHS office you contract with

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

Agencies with a DSHS or AAA home care contract may follow the contract's time frames for starting services and for discharge notice (WAC 246-335-420(1)(d), (3)(d)).

Example: Pierce County Aging and Disability Resources
Prints in: 9 policies (including 1.6, 2.1, 2.2 and 2.11)

Answer: _____

Builder step: Services and charges

Q26. Your charges

Required.

Write it the way a client would read it. The bill of rights tells clients what the agency charges for services (WAC 246-335-435(12)). These are your prices, not a state fee.

Example: $38.00 per hour for all services, with a 3-hour minimum visit
Prints in: policies 2.1 and 3.1

Answer: _____

Builder step: People and dates

Q27. Owner or governing body that adopts the manual

Required.

The licensee: the owner, members or board who sign the license application and its attestation. DOH asks for every owner with 10% or more on the application.

Example: Morgan Ellis, Managing Member
Prints in: the cover page and 12 policies (including 1.1, 1.2, 1.3 and 1.5)

Answer: _____

Q28. Administrator

Required.

The administrator manages the agency day to day and must be a home care employee (WAC 246-335-415(11)). DOH needs a Washington State Patrol check and disclosure statement for them, dated within 3 months, with the application, and written notice within 30 days if the administrator changes (WAC 246-335-335(5)).

Example: Jordan Lee
Prints in: the cover page and 39 policies (including 1.1, 1.2, 1.3 and 1.4)

Answer: _____

Q29. Education and experience your administrator must have

Pre-filled if left blank.

Washington leaves this to your policy. Choose a standard your administrator meets today. The administrator must have the education and experience the agency's own policies require (WAC 246-335-415(11)). DOH checks your administrator against what you write here.

Example: A high school diploma or equivalent and at least two years of experience in home care, health care or business management, including one year supervising staff
If left blank, prints as: A high school diploma or equivalent and at least two years of experience in home care, health care or business management, including one year supervising staff
Prints in: policies 1.2 and 4.2

Answer: _____

Q30. Alternate administrator

Required.

The administrator designates in writing an alternate to act in their absence (WAC 246-335-415(11)(c)). The manual includes the designation form.

Example: Taylor Brooks
Prints in: the cover page and 8 policies (including 1.1, 1.2, 1.6 and 1.8)

Answer: _____

Q31. Supervisor of direct care services

Required.

The licensee must employ a supervisor of direct care services, who supervises all care, contacts every client at least every six months and completes at least 10 hours of training a year (WAC 246-335-445). Washington does not require a nurse. DOH needs a Washington State Patrol check and disclosure statement for them with the application.

Example: Casey Morgan
Prints in: the cover page and 40 policies (including 1.1, 1.3, 1.5 and 1.6)

Answer: _____

Q32. Education and experience your supervisor must have

Pre-filled if left blank.

No rule sets these. Choose a standard your supervisor and alternate both meet today. Used in the supervisor's job description. The alternate must be similarly qualified (WAC 246-335-445(2)).

Example: Current Washington certification as a home care aide or nursing assistant, or a higher health care credential, and at least one year of experience giving or supervising personal care
If left blank, prints as: Current Washington certification as a home care aide or nursing assistant, or a higher health care credential, and at least one year of experience giving or supervising personal care
Prints in: policies 3.3 and 4.2

Answer: _____

Q33. Alternate supervisor of direct care services

Required.

The supervisor designates in writing a similarly qualified alternate to act in their absence, and the alternate also completes 10 hours of training a year (WAC 246-335-445(2)-(3)).

Example: Riley Chen
Prints in: the cover page and 22 policies (including 1.1, 1.6, 2.1 and 2.2)

Answer: _____

Q34. Person who orients workers and checks their skills

Required.

Everyone gets in-person orientation to your policies, and their skills or training are verified, before they care for a client on their own (WAC 246-335-425(9)). It can be the supervisor.

Example: Casey Morgan, Supervisor of direct care services
Prints in: 11 policies (including 1.1, 2.3, 2.4 and 2.9)

Answer: _____

Q35. Date you adopt the manual

Required.

Format: a date
Example: November 1, 2026
Prints in: the cover page and policies 1.3 and 6.4

Answer: _____

Q36. Next review date

Required.

Usually one year after you adopt the manual, alongside your yearly infection control review.

Format: a date
Example: November 1, 2027
Prints in: the cover page and policies 1.3, 1.7 and 6.1

Answer: _____

Builder step: How you'll operate

Q47. DSHS-approved training program your caregivers use

Only asked, and then required, if Q39 is "We hire some untrained caregivers and arrange DSHS-approved training for them".

Only DSHS-approved curricula and instructors count toward the 75 hours of long-term care worker training (RCW 74.39A.074). Check the program is on DSHS's approved list.

Example: Sample Caregiver Training Center (DSHS-approved community instructor)
Prints in: policies 4.1 and 4.6

Answer: _____

Q48. Days to finish investigating a complaint

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your quality improvement program needs a procedure for receiving, investigating and resolving complaints (WAC 246-335-455(1)). DOH can hold you to the number you choose.

Format: a whole number of up to three digits
Example: 14
If left blank, prints as: 14
Prints in: policies 3.1, 7.1 and 7.2

Answer: _____

Q49. Days to file visit notes in the client record

Pre-filled if left blank.

No rule sets this number. Choose one you can always meet. Your plan of operation sets the time frames for filing documents in client records, and records are kept current to those time frames (WAC 246-335-415(9); WAC 246-335-450(2)(h)).

Format: a whole number of up to three digits
Example: 7
If left blank, prints as: 7
Prints in: policies 1.1 and 3.4

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	Will you have more than one office?	No
Q2	Do you have a DSHS or area agency on aging (AAA) home care contract?	No (private pay)
Q3	Agency legal name	Sample Home Care, LLC
Q4	Office address in Washington	100 Main Street, Suite 200, Tacoma, WA 98402
Q5	Office phone	(253) 555-0100
Q6	Phone clients and workers call when the office is closed	(253) 555-0199
Q7	Office hours	Monday to Friday, 8:00 a.m. to 5:00 p.m.
Q8	Days and hours clients can receive care	7 days a week, 7:00 a.m. to 10:00 p.m.
Q9	Counties DOH has approved, or you are applying for	Pierce and King counties
Q10	DOH license number	IHS.FS.60000000
Q11	Your other office addresses	Not asked with these answers
Q12	Area agency on aging or DSHS office you contract with	Not asked with these answers

Builder step: Services and charges

	Question	Sample answer
Q13	Will you provide personal care?	Yes
Q14	Will you provide housework?	Yes
Q15	Will you provide essential shopping?	Yes
Q16	Will you provide travel to medical services?	Yes
Q17	Will you provide meal preparation?	Yes
Q18	Will you provide family respite care?	Yes

	Question	Sample answer
Q19	Which clients will workers help move between bed, chair, toilet and tub?	Only clients who can help with their own transfer, without a device
Q20	How will workers help clients take their own medications?	Reminding or coaching, handing over the container and opening it
Q21	Will workers help with passive range of motion exercises?	No
Q22	Will workers help clients take their own vital signs, for information only?	No
Q23	Will you provide one-time visits?	No
Q24	Will you serve clients under 18?	Not usually (services are designed for adults)
Q25	Will workers prepare food for clients on their own?	Yes
Q26	Your charges	$38.00 per hour for all services, with a 3-hour minimum visit

Builder step: People and dates

	Question	Sample answer
Q27	Owner or governing body that adopts the manual	Morgan Ellis, Managing Member
Q28	Administrator	Jordan Lee
Q29	Education and experience your administrator must have	A high school diploma or equivalent and at least two years of experience in home care, health care or business management, including one year supervising staff
Q30	Alternate administrator	Taylor Brooks
Q31	Supervisor of direct care services	Casey Morgan
Q32	Education and experience your supervisor must have	Current Washington certification as a home care aide or nursing assistant, or a higher health care credential, and at least one year of experience giving or supervising personal care
Q33	Alternate supervisor of direct care services	Riley Chen
Q34	Person who orients workers and checks their skills	Casey Morgan, Supervisor of direct care services
Q35	Date you adopt the manual	November 1, 2026

	Question	Sample answer
Q36	Next review date	November 1, 2027

Builder step: How you'll operate

	Question	Sample answer
Q37	Will any caregivers work as self-employed contractors?	No, all caregivers are employees
Q38	Will you use volunteers or students?	No
Q39	How will your caregivers get the 75 hours of required training?	We hire some untrained caregivers and arrange DSHS-approved training for them
Q40	How will you verify a new worker's skills before they work alone?	Watch them do each task they will do, and check their training records
Q41	Who answers calls when the office is closed?	The supervisor of direct care services, or the alternate when the supervisor is unavailable
Q42	How will the supervisor make the six-month client contact?	By phone or visit, whichever suits the client
Q43	How will you assess client satisfaction?	At each six-month contact, plus a yearly written survey
Q44	Which TB test will employees take when DOH's risk form says to test?	A skin test or a blood test, with a blood test for people born outside the US, as DOH's form prefers
Q45	How will you keep records?	Partly on paper and partly electronically
Q46	Include recommended practices?	Yes, include them
Q47	DSHS-approved training program your caregivers use	Sample Caregiver Training Center (DSHS-approved community instructor)
Q48	Days to finish investigating a complaint	14
Q49	Days to file visit notes in the client record	7

What these answers do to the manual

- Policy 2.9 Help taking vital signs, for information only prints as "Not applicable", because it applies only when Q22 is "Yes, with digital devices, passing the readings to the client or family".
- Policy 2.10 Passive range of motion exercises for maintenance prints as "Not applicable", because it applies only when Q21 is "Yes, for maintenance only, following the client's plan from a therapist or nurse" and Q13 is "Yes".
- In 30 policies, passages written for other answers are left out and the ones that match these answers are kept, so the manual describes only the services and arrangements

this agency chose.

- Every name, phone number, address and date above prints where the manual needs it. Part 2 shows where each one prints.

How answers become policy text

Examples from the manual itself, with the sample answers filled in.

Q13. Will you provide personal care?

In Policy 4.2 Job descriptions, the sample answer "Yes" prints:

> - personal care: help with activities of daily living such as bathing, dressing, eating, toileting, personal hygiene, moving around and transfers, within the limits in Policy 2.3;
>
> `Policy 4.2 Job descriptions, sample answer`

The answer "No" prints this instead:

> - **Qualifications:** Sample Home Care, LLC does not provide personal care, so its caregivers are not long-term care workers and do not need home care aide certification (Policy 4.6). They need the skills for the services they give, shown through orientation and skills verification (Policy 4.5).
>
> `Policy 4.2 Job descriptions, other answer`

Q38. Will you use volunteers or students?

In Policy 1.1 Plan of operation and management across approved counties, the sample answer "No" prints:

> 4. Sample Home Care, LLC uses no volunteers or students (Policy 1.5).
>
> `Policy 1.1 Plan of operation and management across approved counties, sample answer`

The answer "Yes" prints this instead:

> 4. Volunteers and students work under the supervisor's direction in the roles set out in Policy 1.5.
>
> `Policy 1.1 Plan of operation and management across approved counties, other answer`

Q22. Will workers help clients take their own vital signs, for information only?

Policy 2.9 Help taking vital signs, for information only prints in full only when Q22 is "Yes, with digital devices, passing the readings to the client or family". With any other answer, the policy keeps its number and prints this one statement instead:

> Sample Home Care, LLC does not offer help with taking vital signs, and its workers do not take or help clients take vital signs. If this changes, the agency will adopt this policy first and follow WAC 246-335-420(12).
>
> `Policy 2.9 Help taking vital signs, for information only, when it does not apply`

See it printed. The free sample policy uses exactly these answers: Policy 5.1, Mandatory reporting: abuse, neglect, exploitation, abandonment and rule noncompliance, as it prints in the Washington manual: https://www.carerulebook.com/samples/us-washington-home-care.pdf