

Home Care & Home Healthcare Provider Checklist

Use this handy guide when you speak to a home care or home healthcare provider representative. Asking the right questions upfront will help you make a more informed decision.

Agency Information

Agency Name:	Contact:
E-Mail:	Phone:

Agency Business Practices	Yes	No	Notes
How long has the agency been in business?			
How many hours are in a minimum shift? What about a maximum shift? Can a shift be split?			
Can the agency respond to your needs 24 hours a day?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the agency carry malpractice insurance?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the agency bonded? Are each of the caregivers bonded?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the agency give or receive payments for referrals?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the agency employ geriatric care managers to conduct assessments?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the agency complete fall risk assessments for each client? If so, how often?	<input type="checkbox"/>	<input type="checkbox"/>	
How does the agency resolve problems or complaints?			
Is staff provided with continuing education? What educational opportunities are offered?	<input type="checkbox"/>	<input type="checkbox"/>	

Documentation & Supervision	Yes	No	Notes
Does each client have a written care plan which documents the caregiver's routine duties? How often is the care plan updated?	<input type="checkbox"/>	<input type="checkbox"/>	
Will a supervisor visit the client's home periodically to review the client's care?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there an automated system in place to document caregiver arrival and departure times?	<input type="checkbox"/>	<input type="checkbox"/>	
Do caregivers receive an orientation for each new client prior to working in the home?	<input type="checkbox"/>	<input type="checkbox"/>	

Caregiver Information	Yes	No	Notes
Are the caregivers employees of the agency or are they contractors?			
Are all caregivers licensed and certified? If not, what are the minimum qualifications for each caregiver?	<input type="checkbox"/>	<input type="checkbox"/>	
Are all caregivers current on CPR and First Aid Training?	<input type="checkbox"/>	<input type="checkbox"/>	
Do all caregivers have a current tuberculosis (TB) test?	<input type="checkbox"/>	<input type="checkbox"/>	
Do caregivers have any special training such as:			
• Infection control	<input type="checkbox"/>	<input type="checkbox"/>	
• Safe bending and lifting practices	<input type="checkbox"/>	<input type="checkbox"/>	
• Managing incontinence	<input type="checkbox"/>	<input type="checkbox"/>	
• Managing difficult behaviors	<input type="checkbox"/>	<input type="checkbox"/>	
• Dealing with memory loss or confusion	<input type="checkbox"/>	<input type="checkbox"/>	

Personal Services (ADLs, special needs)	Yes	No	Notes
What services are available?	<input type="checkbox"/>	<input type="checkbox"/>	
• Assistance with activities of daily living	<input type="checkbox"/>	<input type="checkbox"/>	
• Housekeeping	<input type="checkbox"/>	<input type="checkbox"/>	
• Daily chores	<input type="checkbox"/>	<input type="checkbox"/>	
• Transportation	<input type="checkbox"/>	<input type="checkbox"/>	
• Companionship	<input type="checkbox"/>	<input type="checkbox"/>	
• Medical care	<input type="checkbox"/>	<input type="checkbox"/>	
• Rehabilitation	<input type="checkbox"/>	<input type="checkbox"/>	

Transportation	Yes	No	Notes
Is transportation available for specific appointments?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, are there any limitations? Additional fees?	<input type="checkbox"/>	<input type="checkbox"/>	

Healthcare	Yes	No	Notes
Does the agency offer healthcare services?	<input type="checkbox"/>	<input type="checkbox"/>	
Is nurse delegation available to provide services at a lower cost?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the agency have licensed nurses such as RNs or LPNs on their staff?	<input type="checkbox"/>	<input type="checkbox"/>	

Policies & Cost	Notes
When is payment due?	
What is the cost of overtime if a caregiver stays late?	
What are the billing, payment and credit policies?	
Are there any additional costs for travel time or additional services?	
When may a contract be terminated?	
What is the policy for requesting another caregiver?	