

When a family decides to give in-home care a try, the primary concern is ensuring that their loved one will receive the best possible treatment. Of course, trusting an outside party with these very personal responsibilities is often challenging. Family caregivers often take it upon themselves to vet potential providers, but it can be difficult to know what questions to ask and red flags to look for.

The list of questions below will help you gather basic information about a company's services and gain a deeper understanding of its dedication to quality care and customer service. Any reputable home care company should be willing and able to answer these queries.

Keep in mind that some companies will conduct the intake process for new clients by phone, while others may prefer to schedule a face-to-face meeting (fees may apply) to discuss your needs and their services in detail. Use this worksheet to record a company's answers and ensure that you have addressed all of these crucial points.

### Home Care Company Information

*Company Name:*

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*Phone Number:*

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*Date:*

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*Contact:*

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*Location:*

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*Email:*

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Business Basics	Notes
<i>How long have you been in business?</i>	
<i>Does your state require licensing of in-home care companies?</i>	
<i>Are you insured? (Ask for a copy of their Insurance Declaration)</i>	
<i>Are your caregivers bonded?</i>	
<i>Do you provide workers' compensation insurance for your caregivers?</i>	
<i>Can you provide references from previous clients?</i>	

Care Management	Notes					
<p><i>Do you create a personalized care plan for each client? What does this include?</i></p>						
<p><i>How often do you evaluate and update a client's written plan of care?</i></p>						
<p><i>How do you match your clients with caregivers?</i></p>						
<p><i>What is your policy for communicating with a client and their family members?</i></p>						
Quality of Care Management						
Poor	1	2	3	4	5	Excellent

Caregiver Selection and Training	Notes					
<i>What is your caregiver hiring process like?</i>						
<i>Do you conduct background checks? If so, what kind?</i>						
<i>Do you conduct drug tests?</i>						
<i>Do your caregivers have to meet any certification or education requirements?</i>						
<i>Do you provide training for your caregivers? If so, what kind?</i>						
<i>Do your caregivers participate in ongoing training and education?</i>						
<i>Are clients able to interview potential caregivers? If so, is there a fee involved?</i>						
Quality of Caregiver Selection and Training						
Poor	1	2	3	4	5	Excellent

Company Policies	Notes					
<i>How do you handle complaints and requests for a new caregiver?</i>						
<i>Can a caregiver be replaced before their next shift?</i>						
<i>What is your policy for no-show or late caregivers?</i>						
<i>Do you have a policy regarding time minimums per shift or per week?</i>						
<i>Are there specific services that your company specializes in?</i>						
<i>Are there specific services that your company does not provide?</i>						
<i>How do you handle emergencies?</i>						
<i>Are after-hours phone calls answered by one of your staff members or are they routed to an answering service?</i>						
Quality of Company Policies						
Poor	1	2	3	4	5	Excellent

Payment Methods	Notes
<i>What forms of payment do you accept?</i>	
<i>Do you charge different rates for nights, weekends and holidays?</i>	
<i>How often do you bill?</i>	
<i>Do you take a deposit for services?</i>	
<i>Do you accept long-term care insurance? If so, do you bill the insurance company directly or do clients pay you and then get reimbursed?</i>	

### Additional Notes and Next Steps

A large, empty rectangular box intended for handwritten or typed notes and next steps.

### Overall Company Rating

Poor      1      2      3      4      5      Excellent