

Home Care & Home Healthcare Provider Checklist

Use this 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?			
Does the agency carry malpractice insurance?			
Is the agency bonded?			
Are each of the caregivers bonded?			
Does the agency give or receive payments for referrals?			
Does the agency employ geriatric care managers to conduct assessments?			
Does the agency complete fall risk assessments for each client? If so, how often?			
How does the agency resolve problems or complaints?			
Is staff provided with continuing education? What educational opportunities are offered?			

Documentation and 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?			
Will a supervisor visit the client's home periodically to review the client's care?			
Is there an automated system in place to document caregiver arrival and departure times?			
Do caregivers receive an orientation for each new client prior to working in the home?			

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?			
Are all caregivers current on CPR and First Aid Training?			
Do all caregivers have a current tuberculosis (TB) test?			
Do caregivers have special training such as: <ul style="list-style-type: none"> • Infection control • Safe bending and lifting practices • Managing incontinence • Managing difficult behaviors • Dealing with memory loss or confusion 	<input type="checkbox"/> 	<input type="checkbox"/> 	

Personal Services (ADLs, special needs)	Yes	No	Notes
What services are available? <ul style="list-style-type: none"> • Assistance with activities of daily living • Housekeeping • Daily chores • Transportation • Companionship • Medical care • Rehabilitation 	<input type="checkbox"/> 	<input type="checkbox"/> 	

Transportation	Yes	No	Notes
Is transportation available for specific appointments?			
If yes, are there any limitations? Additional fees?			

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

Policies and 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?	