

⚠ This is **NOT** the official survey. This Prep Worksheet is an **optional** tool designed to help you prepare your responses for the online survey. **The prep worksheet is not an exact match of the survey itself.**



# 2023 Survey Prep Worksheet

Survey open January 3rd - February 28th

Many of the questions in the survey will be easy to answer off the top of your head. We haven't included those questions in the prep worksheet. The prep worksheet contains the questions in the survey that will likely require some research on your part.

You may fill out this document or print the Prep Worksheet and use it to write in as many of your responses as possible.



To take the online survey, go to  
[www.homecarepulse.com/benchmarking/participate/](http://www.homecarepulse.com/benchmarking/participate/)



Since the 2023 report is inclusive of multiple types of care providers, we have indicated each question with the following identifiers: **Home Care** **Home Health** **Hospice**. You only need to prepare responses for questions applicable to the types of care your business provides.

## SALES & MARKETING QUESTIONS

- 1.1 Home Care a) Inquiry Tracking/Reporting** - Which statement most accurately describes your consistency in tracking service inquiry calls to your office during 2022?\*
- These are prospective clients/family members calling your office about services OR others calling on behalf of the client/family.*
- We track every inquiry call and who referred them.
  - We track most of the inquiry calls and who referred them.
  - We do little or no tracking of inquiries and who referred them.
- b) Number of Inquiry Calls** - How many prospective client inquiry calls did you receive in 2022 (i.e. clients/family members looking for service)?
- Please include all inquiries you received in 2022, not just “warm/hot” leads and include inquiries from all locations your business operates in and is reporting on. If someone called for services and provided some kind of contact information, such as a phone number/address/email, this is considered an inquiry.*
- # of Inquiry Calls in 2022:** \_\_\_\_\_
- 1.2 Home Care Number of New Client Assessments** - As part of your intake process, how many new client assessments or care consultations with the client/family members did your business perform in 2022?
- # of New Client Assessments in 2022:** \_\_\_\_\_
- 1.3 Home Care Number of New Clients** - How many total new clients started services in 2022?
- Include all locations your business operates.*
- # of New Clients in 2022:** \_\_\_\_\_
- 1.4 Home Care Top Revenue Producing Sales & Marketing Sources** - Select your top five revenue-generating sales and marketing sources in 2022. Then select the percentage of 2022 annual revenue for which each top method was responsible.
- You will be provided with two drop-down menus in the online survey to select your top marketing sources.*
- |                                   |                                 |
|-----------------------------------|---------------------------------|
| <b>#1 Marketing Source:</b> _____ | <b>% of 2022 Revenue:</b> _____ |
| <b>#2 Marketing Source:</b> _____ | <b>% of 2022 Revenue:</b> _____ |
| <b>#3 Marketing Source:</b> _____ | <b>% of 2022 Revenue:</b> _____ |
| <b>#4 Marketing Source:</b> _____ | <b>% of 2022 Revenue:</b> _____ |
| <b>#5 Marketing Source:</b> _____ | <b>% of 2022 Revenue:</b> _____ |
- 1.5 Home Health Hospice Number of New Patients** - How many patients were added to your census in 2022?
- # of Patients in 2022:** \_\_\_\_\_



## RECRUITMENT & RETENTION QUESTIONS

- 2.1 Home Care Top Caregiver Recruitment Sources and Methods** - Input your top two most effective caregiver recruitment sources and methods used in 2022.  
 #1 Source/Method: \_\_\_\_\_  
 #2 Source/Method: \_\_\_\_\_
- 2.2 Home Health Hospice Top Care Professional Recruitment Sources and Methods** - From the drop-down list below, please select your top two most effective recruitment sources and methods used to hire care professionals in 2022.  
 #1 Source/Method: \_\_\_\_\_  
 #2 Source/Method: \_\_\_\_\_
- 2.3 Home Care a) Caregiver Applications** - Did your business track the total number of caregivers who applied for employment in 2022?  
 Yes      No      Do not know
- b) Number of Caregiver Applications** - How many caregiver employment applications did your business receive in 2022?  
 Number of Caregiver Applications in 2022: \_\_\_\_\_
- 2.4 Home Care a) Caregiver Interviews** - Did your business track the number of caregiver interviews conducted for employment in 2022?  
 Yes      No      Do not know
- b) Number of Caregiver Interviews** - How many caregiver interviews for employment did your business conduct in 2022?  
 Number of Caregiver Interviews in 2022: \_\_\_\_\_
- 2.5 Home Care Caregiver Interview Attendance** - Approximately what percentage of applicants invited to an interview in 2022 showed up for their scheduled interviews?  
*If unsure, provide best estimate or leave blank.*  
 Percentage of Applicants in 2022: \_\_\_\_\_
- 2.6 Home Care Caregivers Hired** - How many new caregivers were hired in 2022?  
*Whole numbers only.*  
 Caregivers Hired in 2022: \_\_\_\_\_
- 2.7 Home Care Caregivers Terminated/Quit** - How many employed caregivers were either terminated or quit during 2022? *(Used in caregiver turnover calculation.) Whole numbers only.*  
 Caregivers Terminated/Quit in 2022: \_\_\_\_\_
- 2.8 Home Care Caregivers Employed** - How many caregivers were actively employed by your business for each of the following years? *(Used in caregiver turnover calculation.) Whole numbers only.*  
 Number of caregivers employed as of 12/31/2021: \_\_\_\_\_  
 Number of caregivers employed as of 12/31/2022: \_\_\_\_\_



- 2.9 Home Health Hospice a) Nurse Applications** - Did your business track the total number of nurses who applied for employment in 2022?  
 Yes      No      Do not know
- b) Number of Nurse Applications** - How many nurse employment applications did your business receive in 2022?  
 Number of Nurse Applications in 2022: \_\_\_\_\_
- 2.10 Home Health Hospice a) Nurse Interviews** - Did your business track the number of nurse interviews conducted for employment in 2022?  
 Yes      No      Do not know
- b) Number of Nurse Interviews** - How many nurse interviews for employment did your business conduct in 2022?  
 Number of Nurse Interviews in 2022: \_\_\_\_\_
- 2.11 Home Health Hospice Nurse Interview Attendance** - Approximately what percentage of nurse applicants invited to an interview in 2022 showed up for their scheduled interviews?  
*If unsure, provide best estimate or leave blank.*  
 Percentage of Nurse Applicants in 2022: \_\_\_\_\_
- 2.12 Home Health Hospice Nurses Hired** - How many new nurses were hired in 2022?  
*Whole numbers only.*  
 Nurses Hired in 2022: \_\_\_\_\_
- 2.13 Home Health Hospice Nurses Terminated/Quit** - How many employed nurses were either terminated or quit during 2022? *(Used in nurse turnover calculation.) Whole numbers only.*  
 Nurses Terminated/Quit in 2022: \_\_\_\_\_
- 2.14 Home Health Hospice Nurses Employed** - How many nurses were actively employed by your business for each of the following years? *(Used in nurse turnover calculation.) Whole numbers only.*  
 Number of nurses employed as of 12/31/2021: \_\_\_\_\_  
 Number of nurses employed as of 12/31/2022: \_\_\_\_\_
- 2.15 Home Care Home Health Hospice Care Professional Hourly Wages** - What was your average starting HOURLY wage as of January 2023 for the following types of professional caregivers?  
*Leave any fields that do not apply blank.*
- 2023**
- \_\_\_\_\_ Companion/Homemaker  
 \_\_\_\_\_ Personal Care Attendant\*  
 \_\_\_\_\_ Certified Nurse Assistant (CNA)  
 \_\_\_\_\_ Registered Nurse (RN)  
 \_\_\_\_\_ Licensed Practical Nurse (LPN)  
 \_\_\_\_\_ Licensed Vocational Nurse (LVN)

**\*Personal Care Attendant** - *This is a caregiver who specifically handles clients in need of bathing assistance, incontinence care, hygiene assistance, etc.*

**2.16 Home Care Caregiver Live-in Wages** - What was your average starting daily wage for a LIVE-IN caregiver\* as of January 2023?

If you do not offer live-in care services, please select, "Do not offer live-in care services" from the drop-down menu in the online survey.

2023

\_\_\_\_\_ Starting Live-In Caregiver Wage

\***Live-in caregivers** live in the client's home and sleep at least 8-hours during a 24 hour shift. The care is billed and paid on a daily flat rate rather than an hourly rate.

## CAREGIVER TRAINING QUESTIONS

**3.1 Home Care Caregiver Orientation Training Hours** - Approximately how many hours are your initial caregiver trainings/orientations for your newly hired caregivers? (Used in caregiver turnover calculation.) Whole numbers only.

Caregiver Orientation Training Hours in 2022: \_\_\_\_\_

**3.2 Home Care Ongoing Caregiver Training Hours** - How many hours of ongoing training do you require caregivers to complete within their first 12 months of employment? (Used in caregiver turnover calculation.) Whole numbers only.

Ongoing Caregiver Training Hours in 2022: \_\_\_\_\_

**3.3 Home Health Hospice Clinician Orientation Training Hours** - Approximately how many hours are your initial clinician trainings/orientations for your newly hired clinicians?

(Used in clinician turnover calculation.) Whole numbers only.

Clinician Orientation Training Hours in 2022: \_\_\_\_\_

**3.4 Home Health Hospice Ongoing Clinician Training Hours** - How many hours of ongoing training do you require clinicians to complete within their first 12 months of employment?

(Used in clinician turnover calculation.) Whole numbers only.

Ongoing Clinician Training Hours in 2022: \_\_\_\_\_

## OPERATIONAL & TECHNOLOGY QUESTIONS

**4.1 Home Care a) Home Care Hospital Admission Rate Tracking** - Are you tracking home care client hospital admissions? A hospital admission is defined as a hospitalization within 60 days of the start of care.

Yes, I am tracking hospital admissions      Not tracking currently

**Home Care b) Home Care Hospital Admission Rate** - What was your hospital admission rate for home care clients in 2022? A hospital admission is defined as a hospitalization within 60 days of the start of care.

2022: \_\_\_\_\_

**Home Health Hospice c) Home Health/Hospice Hospital Readmission Rate** - What was your hospital readmission rate for home health or hospice patients in 2022? A hospital readmission is defined as a hospitalization within 60 days of the start of care.

2022: \_\_\_\_\_



**4.2 Home Care Client Volume** - How many active clients did you have on service at the close of 2021 and 2022?

*Include all locations your business operates.*

**Active Clients as of December 31, 2021:** \_\_\_\_\_

**Active Clients as of December 31, 2022:** \_\_\_\_\_

**4.3 Home Care Clients Stopped Services** - How many total clients stopped services in 2022?

*Include all locations your business operates. (Used in client turnover calculation.)*

**Clients Stopped Service in 2022:** \_\_\_\_\_

**4.4 Home Care Clients Serviced** - How many total clients did you provide service for during 2022?

*Include all locations your business operates. (Used in average client lifetime value calculation.)*

**Clients Serviced in 2022:** \_\_\_\_\_

**4.5 Home Care Active Clients for 2022** - As of December 31, 2022, how many active clients did you have?

**Active Clients for 2022:** \_\_\_\_\_

**4.6 Home Care Total Length of Service for All Active Clients for 2022** - As of December 31, 2022, what was the sum total of all your active clients' length of service?

*How to calculate: Take how many days of service each of your active clients had as of December 31, 2022 and add them together. (Used in average client lifetime value calculation.)*

*Please be as accurate as possible. If you are making an uneducated guess, please skip this question instead.*

**Total length of service of all active clients (in days):** \_\_\_\_\_

**4.7 Home Care Home Health Hospice Office Support Staff** - How many office staff members (non-care professionals) occupied each of the following positions in your business as of December 31, 2022?

*(Please include all locations for your agency.)*

*Each full-time employee (30+ hrs/week) = 1 Each part-time employee (<30 hrs/week) = .5*

**Who should you include?** *Office support staff includes active owners, directors, admins, schedulers, managers, supervisors, nurses, office assistants, etc, i.e. a position that provides support to your clients and your caregiving staff. Your total should not exceed your total number of office support staff.*

- \_\_\_\_\_ Active owners (+5% ownership)
- \_\_\_\_\_ Executive Management
- \_\_\_\_\_ Administrative staff (payroll, billing, secretarial)
- \_\_\_\_\_ Sales reps
- \_\_\_\_\_ Client care coordinator/care schedulers
- \_\_\_\_\_ Dedicated intake personnel
- \_\_\_\_\_ Others not listed
- \_\_\_\_\_ **Total**



**4.8 Home Care Home Health Hospice Office Support Staff Quit/Terminated** - How many office staff (non-care professionals) quit or were terminated in 2022?

*(Please include all locations for your agency.)*

*Each full-time employee (30+ hrs/week) = 1 Each part-time employee (<30 hrs/week) = .5*

**Who should you include?** Office support staff includes **active owners**, directors, admins, schedulers, managers, supervisors, nurses, office assistants, etc, i.e. a position that provides support to your clients and your caregiving staff.

- \_\_\_\_\_ Active owners (+5% ownership)
- \_\_\_\_\_ Executive Management
- \_\_\_\_\_ Administrative staff (payroll, billing, secretarial)
- \_\_\_\_\_ Sales reps
- \_\_\_\_\_ Client care coordinator/care schedulers
- \_\_\_\_\_ Dedicated intake personnel
- \_\_\_\_\_ Others not listed
- \_\_\_\_\_ **Total**

**4.9 Home Care Home Health Hospice Office Support Staff Wages** - What is the average annual salary for the following office staff positions (non-care professionals) in your business.

*Please input dollar amount.*

**2022**

- \_\_\_\_\_ Active owners (+5% ownership)
- \_\_\_\_\_ Executive management
- \_\_\_\_\_ Administrative staff (payroll, billing, secretarial)
- \_\_\_\_\_ Sales reps
- \_\_\_\_\_ Client care coordinator/care schedulers
- \_\_\_\_\_ Dedicated intake personnel

## FINANCIAL QUESTIONS

**SPECIAL NOTE** - It is very important that you answer the following financial questions as accurately as possible.

**PLEASE** do not leave out any 2022 expenses found on your final income statement. If you have an expense that doesn't seem to fit in any of the fields listed, please list the amounts in the "other" categories under the proper expense type. We have broken things out into more detailed categories, so we can properly calculate the data according to national accounting standards, thus upholding the integrity of the data.

**5.1 Home Care Month & Year Started** - What month and year did your home care business bring on its first client?\*

Month: \_\_\_\_\_

Year: \_\_\_\_\_

**5.2 Home Care Annual Revenue** - Please enter your annual revenue for the calendar year of 2021 & 2022.

*Only include revenue associated with your private duty home care business. Please enter a figure, even if it is \$0.*

2021: \_\_\_\_\_

2022: \_\_\_\_\_

**5.3 Home Care Direct Care Expenses** - List 2022 expenditures for the following "Direct Care" categories.

Round to the nearest hundred dollars. If you did not have expenses in a category, please leave the default value of \$0.





**\*Other Direct Care Expenses** - This includes any other expenses in a category, please leave the default value of \$0.

- \_\_\_\_\_ Caregiver wages
- \_\_\_\_\_ Workers comp insurance
- \_\_\_\_\_ Caregiver benefits (health, 401k, supplemental, etc.)
- \_\_\_\_\_ Caregiver payroll taxes (employer taxes, unemployment insurance, etc.)
- \_\_\_\_\_ Caregiver reimbursements (mileage, meals, etc.)
- \_\_\_\_\_ Caregiver ongoing training (not initial training)
- \_\_\_\_\_ \*Other direct care expenses not listed

**5.4 Home Care Caregiver Recruitment & Retention Expenses** - List 2022 caregiver recruitment expenditures for the following categories.

*Round to the nearest hundred dollars. If you did not have expenses in a category, please leave the default value of \$0.*

- \_\_\_\_\_ Caregiver job ads, online recruitment sites, postings, and networking
- \_\_\_\_\_ Caregiver background checks and screenings
- \_\_\_\_\_ Caregiver retention (bonuses, recognition program, satisfaction mgmt, etc.)
- \_\_\_\_\_ Caregiver onboarding and initial training
- \_\_\_\_\_ Team wages associated with recruiting and retaining caregivers
- \_\_\_\_\_ Pre-employment assessments
- \_\_\_\_\_ All other expenses related to recruiting and retaining caregivers

**5.5 Home Care Sales & Marketing Expenses** - List 2022 sales and marketing expenditures for the following categories.

*Round to the nearest hundred dollars. If you did not have expenses in a category, please leave the default value of \$0.*

- \_\_\_\_\_ Traditional advertising (print, radio, etc.)
- \_\_\_\_\_ Internet advertising (Google Ads, paid ads on Facebook, etc.)
- \_\_\_\_\_ Networking and events (community, gifts, conventions, trade shows/marketing to clients, etc.)
- \_\_\_\_\_ Search Engine Optimization (SEO)
- \_\_\_\_\_ Sales rep salaries
- \_\_\_\_\_ Sales rep bonuses and perks
- \_\_\_\_\_ Lead generation websites (Caring.com, etc.)
- \_\_\_\_\_ All other marketing-related expenses (consulting, etc.)

**5.6 Home Care Operating Expenses** - List other 2022 operating expenditures for each of the categories below.

*Round to the nearest hundred dollars. If you did not have expenses in a category, please leave the default value of \$0.*

- \_\_\_\_\_ Rent, maintenance, and utilities
- \_\_\_\_\_ Office support wages (admins, schedulers, HR staff, nurses)
- \_\_\_\_\_ Executive team wages (exclude all owners)
- \_\_\_\_\_ Scheduling software, including telephony
- \_\_\_\_\_ Franchise royalty fees (if applicable)
- \_\_\_\_\_ Association/membership dues (if applicable)
- \_\_\_\_\_ Travel/meals/entertainment expenses
- \_\_\_\_\_ \*Other operating expenses (exclude owners' salary and benefits)

**5.7 Home Care 2022 Total Billable Hours** - For 2022, how many total hours of care did your business bill?

*Live-in care is billed daily for 24-hour care, i.e. caregiver sleeps in the home.*

- \_\_\_\_\_ Hourly care hours
- \_\_\_\_\_ Live-in care hours (1 day and night = 24 hours)





**5.8 Home Care a) Service Billing Methods** - Select the best description of how you **typically** bill for HOURLY in-home care services?

- Bill by length of visit (i.e. how long the caregiver stays for each visit)
- Bill by caregiver skill needed (e.g. companion, personal care attendant, CNA, etc.)
- Bill based on length of visit and caregiver skill needed, depending on the situation
- Other (please specify) Please enter an 'other' value for this selection

**b) Hourly Billing Rates** - What is the average hourly billing rate you charge for the following length of visits?

*If your visit lengths vary from these, give your best estimate. Round up to the nearest \$0.50 increment.*

**2022**

- \_\_\_\_\_ 1-2 hour visits
- \_\_\_\_\_ 3-5 hour visits
- \_\_\_\_\_ 6-11 hour visits
- \_\_\_\_\_ 12-24 hour visits

**c) Approximately what percentage of your total billable hours are billed for each length of visit?**

**2022**

- \_\_\_\_\_ 1-2 hour visits
- \_\_\_\_\_ 3-5 hour visits
- \_\_\_\_\_ 6-11 hour visits
- \_\_\_\_\_ 12-24 hour visits

**d) Skill Level Billing Rates** - What are the average hourly rates you charge clients for the following types of caregivers?

*Round up to the nearest \$0.50 increment.*

**2022**

- \_\_\_\_\_ Companion/Homemaker
- \_\_\_\_\_ Personal Care Attendant (Trained to take care of personal care needs)
- \_\_\_\_\_ Certified Nurse Assistant or Certified Home Health Aid

**5.9 Home Care Live-In Care Billing Rates** - What is your average DAILY rate for live-in care visits?

*\*Live-in care is billed at a flat daily rate because the caregiver is expected to sleep in the client's home at night. This is not to be confused with 24-hour care, where the client is billed hourly for around-the-clock care.*

**2022 Rate:** \_\_\_\_\_

**5.10 Home Care Percent of Revenue by Service Offering** - What percent of your revenue in 2022 came from the following services?

*Bottom total must equal 100%. Leave categories at 0% if these do not apply to services offered by your business.*

**2022**

- \_\_\_\_\_ Hourly care (i.e. billed hourly)
- \_\_\_\_\_ Live-in care (i.e. billed daily, 24 hour/caregiver sleeps in the home)
- \_\_\_\_\_ Geriatric care management
- \_\_\_\_\_ Alert monitoring services
- \_\_\_\_\_ Private duty skilled nursing services
- \_\_\_\_\_ Healthcare staffing services
- \_\_\_\_\_ Medicare Home Health
- \_\_\_\_\_ Other services not listed



**5.11 Home Care Percent of Revenue by Payer Source** - What percent of your annual revenue in 2022 came from the following payer sources?

*Bottom total must equal 100%. Leave categories at 0% if these do not apply to payer sources used by your business.*

**2022**

- \_\_\_\_\_ Private pay (e.g. check, credit card, cash, etc.)
- \_\_\_\_\_ Long term care insurance
- \_\_\_\_\_ Veterans Administration programs
- \_\_\_\_\_ Billed Medicaid directly
- \_\_\_\_\_ Medicare reimbursement
- \_\_\_\_\_ Medicare Advantage reimbursement
- \_\_\_\_\_ Medicaid Waiver program
- \_\_\_\_\_ Workers compensation
- \_\_\_\_\_ Other insurance
- \_\_\_\_\_ Trusts/banks
- \_\_\_\_\_ Billed hospitals directly
- \_\_\_\_\_ Area Agencies on Aging (AAA)
- \_\_\_\_\_ Accountable Care Organization (ACO) (e.g. bundled payment program, fee for service, etc.)
- \_\_\_\_\_ Managed Care Organization (MCO)
- \_\_\_\_\_ Other payer sources not listed

**Great work! You're now ready to take the online survey.**

Visit <https://www.homecarepulse.com/benchmarking/participate/> between Jan 3 - Feb 28, 2023 to participate.

Be sure to keep your completed copy of this prep worksheet close by as you take the online survey. That way, you can quickly refer to your answer. It's also a good idea to refer to this sheet to benchmark your business against the industry results in the HCP Benchmarking Report.