

Long-Term Care Referral Agent Disclosure and Advisory Form

Agent Business Information

Agent's Business Name: Care Service Options, Inc.
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538
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General Information for Oregon Consumers

This Advisory provides a list of disclosures which Long-Term Care Referral Agents must provide to clients and offers additional information for consumers seeking assistance finding long-term care options.

Mandated Disclosures

Oregon law requires a Long-Term Care Referral Agent to make the following disclosures to a client:

- 1) **Description of the referral.** The types of facilities being referred to the client, may include the following:
 Adult Foster Home Residential Care Facility Assisted Living Facility
 Memory Care Nursing Facility Independent Living
 Continuing Care Retirement Community (CCRC) Medicaid Contracted
 Other: (Please Specify)

- 2) **Limitations on referrals.** The client will be referred only to facilities with which the Referral Agent has a business-to-business contract: Yes No

- 3) **Referral fees.** Any fees paid to the Referral Agent for services will be paid by the admitting home/facility: Yes No

- 4) This Referral Agent's right to a referral fee expires if the client does not move in to a referred facility within a specified period from the time of the referral:
 Yes No
 - a. If Yes, what is the range of the expiration periods specified in this Referral Agent's business-to-business facility agreements? 120 days

- 5) **Privacy Policy.** This Referral Agent's privacy policy is found at the following web link www.CareServiceOptions.com, or a copy is attached.

- 6) **Facility Complaint History.** The Department of Human Services (DHS) website listing complaints concerning facilities/care communities is found at: https://ltclicensing.oregon.gov

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Additional Information

The following additional information beyond the mandatory disclosures is provided to assist the consumer in understanding Oregon laws regarding referrals.

A Referral Agent Must:

- 1) Discontinue providing services to a client who notified the Referral Agent in writing that the client no longer wishes to use the services of the Referral Agent. If the Referral Agent has received compensation from the facility for a referral that has been made, the client may notify the Referral Agent in writing that he/she wish to use the services of another Referral Agent in the future for referral to another facility in a subsequent move. The client's written notice shall identify the name of the facility and the move-in date of the original referral made by the Referral Agent.
- 2) Provide the required disclosures to the client in writing in a conspicuous and clear manner. The disclosure may be made orally first if the agent makes an audio recording with the consent of the client and thereafter provides the client a written disclosure.

A Referral Agent May Not:

- 1) Provide a referral to a long-term care facility/home for compensation unless registered with DHS.
- 2) Refer a client to a facility in which the Referral Agent or an immediate family member has an ownership interest.
- 3) Contact a client or authorized representative who has requested in writing that the Referral Agent stop contacting them.
- 4) Share a client's placement information with or sell a client's placement information to a facility or marketing affiliate without obtaining affirmative consent from the client or his/her authorized representative for each instance of sharing or selling such information.

Authorization to Share Placement Information

I authorize this Referral Agent to share my placement information with the facilities to which I will be referred or with this Referral Agent's marketing affiliates.

Receiving Individual – (electronic) Signature

Date

Receiving Individual – Printed Name

Agent Advisor – Signature

Date