



PORTLAND SENIOR CARE ADVISORS

Your Local Guide to Compassionate Senior Care

Terms of Acknowledgment and Agreement

By submitting the contact form on this website, you confirm that:

1. You have received and reviewed the **following Disclosure** and the **Privacy Policy** for Portland Senior Care Advisors.
2. You understand the information provided in these documents.
3. You agree to the terms described in the Disclosure and the Privacy Policy.
4. Your acceptance through the contact form serves as your electronic signature, which has the same effect as signing these documents in person.

If you have any questions about these terms or would like a printed copy of the documents, you are welcome to contact us at any time.

Long-Term Care Referral Agent Disclosure and Advisory Form

Agent Business Information

Agent's Business Name: Portland Senior Care Advisors LLC

Address: 15110 Boones Ferry Rd. #300-D3

Telephone: (503) 902-2591

Email: info@PortlandSeniorCareAdvisors.com

Website address: <https://PortlandSeniorCareAdvisors.com>

General Information for Oregon Consumers

Oregon Long Term Care Referral Agents are required to provide consumers and clients seeking assistance finding long-term care options the following information.

Mandated Disclosures

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

- 1) **Description of the referral.** The types of facilities being referred to the client, 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 into 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?

It is at the discretion of the senior living community.
- 5) **Privacy Policy.** A copy of the Referral Agent's privacy policy is attached to this advisory form. A copy can be found at the following web link .
- 6) **Facility Complaint History.** The Oregon Department of Human Services (ODHS) 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 wishes 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 ODHS.
- 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 have read, understand, and consent to this agreement and 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 affiliate.

_____ Receiving Individual Signature Date: _____

_____ Receiving Individual Printed Name



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Privacy Policy

Your privacy is very important to us. Accordingly, we have developed this Policy in order for you to understand how we collect, use, communicate and disclose and make use of personal information. The following outlines our privacy policy.

- Before or at the time of collecting personal information, we will identify the purposes for which information is being collected.
- We will collect and use of personal information solely with the objective of fulfilling those purposes specified by us and for other compatible purposes, unless we obtain the consent of the individual concerned or as required by law.
- We will only retain personal information as long as necessary for the fulfillment of those purposes.
- We will collect personal information by lawful and fair means and, where appropriate, with the knowledge or consent of the individual concerned.
- Personal data should be relevant to the purposes for which it is to be used, and, to the extent necessary for those purposes, should be accurate, complete, and up-to-date.
- We will protect personal information by reasonable security safeguards against loss or theft, as well as unauthorized access, disclosure, copying, use or modification.
- We will make readily available to customers information about our policies and practices relating to the management of personal information.

We are committed to conducting our business in accordance with these principles in order to ensure that the confidentiality of personal information is protected and maintained.