



Partnership with A Caring Heart

Senior Housing Referral Agency

No Cost to Residents

Kathy's knowledge and years of experience working with senior programs, and especially senior living communities, provides elders and their families with a valuable resource. The goal is to help clients make the best decision for their situation regarding senior living options. In order to achieve this goal, it is important that we work honestly and openly together. This page outlines the typical process for finding appropriate housing and asks that by your signature, you are acknowledging that you understand and agree to these terms and conditions.

♥ A phone call or e-mail to Kathy starts the process. She will call you and ask details about your current situation.

♥ Health and financial considerations are discussed confidentially during this initial assessment and it is very important that all information regarding these topics are revealed. We will discuss what Senior Housing options want to be considered and based on information and research decide which facilities want to be toured. If the family or resident has contacted facilities or another agency within the past three months it is important for Kathy to be told this information.

♥ Kathy will contact prospective facilities and arrange for a convenient time for a to tour.

♥ The decision regarding facility choice is the resident's with family input. Kathy's role is that of a consultant. She will assist with helping the resident and family ask good questions and discerning information, but the final choice is that of the resident.

♥ When a choice is made—deposit and facility move-in procedures will be discussed with housing staff. Health and financial information will be requested by the housing provider. A health assessment which includes contact names and numbers, medical information, and necessary care be must conducted before moving into a licensed facility. Large communities have their nurse provide this information and the cost is covered in the move-in/entrance fee; Adult Family Homes need to have a contract nurse prove this information, the cost is \$300-\$500. Kathy will help the resident and family arrange for this service. This paperwork is important to provide good information about the resident to the entire staff at the residence and also to comply with state regulations for the facility.

♥ Payment to "A Caring Heart" for Kathy's services is provided through an agreement with the housing facility; therefore a resident, at the time of move-in, must be paying with private funds or long-term care insurance.

♥ Follow-up during the first month by Kathy will be conducted—it is the goal that the choice for senior housing was a good one for the resident, family and facility.

I understand and agree to abide by these terms and conditions:

Perspective Resident or Legal Representative

Date:

Please print this form and provide a signed copy to Kathy at our first meeting.