



OSRAA Code of Ethics

Oregon Senior Referral Agency Association (OSRAA) Code of Ethics

PREAMBLE

The Oregon Senior Referral Agency Association (hereafter, also known as OSRAA) has been committed to common principles and standards of practice since OSRAA's inception in 2004. This Code has been modified and adapted as OSRAA has grown and changed. The Code of Ethics reflects what we value as referral agents and establishes expectations for our members based on principles of practice, accountability, fairness and responsibility. The OSRAA Code of Ethics is intended to ensure the welfare of the client and to protect the reputation and integrity of referral agents.

The OSRAA Code of Ethics is for referral agents in support of day-to-day decision making related to our conduct. The Code is partly obligatory and disciplinary and partly aspirational and descriptive in that it defines the referral agent's role. The Code educates referral agents in the discipline, other professionals, and the public, regarding ethical principles and standards that direct a referral agent's conduct.

The preservation of the highest standards of integrity and ethical principles is vital to the responsible discharge of obligations by members who serve the senior community. The Code of Ethics sets forth the fundamental principles and rules considered essential to this purpose and is applicable to individuals who provide senior housing referrals and consultation. Those who desire membership in the Association must hold to the Code of Ethics.

OSRAA Members

OSRAA Associate Members

OSRAA Business Partners

CODE OF ETHICS ARTICLES

Companies belonging to OSRAA are expected to:

ARTICLE 1

Members are to protect and promote the needs and interest of the client which shall always be the primary driving factor for any referral made by the member. Member must make every effort to be well informed regarding the essential facts of housing options available in their market area.

Members, as a practice, will conduct a quality intake for each client to determine their specific needs based on their personal situation, social and care needs. A face to face and personal intake provides necessary insight to the Member when selecting care options to tour and personalizes this process with each client/family they serve. It is also the practice of Members to tour with client or client's representative whenever possible. Referrals are made only after the intake interview. Member shall not send referral notices out by fax, email or other means without an initial client intake interview.

ARTICLE 2

Prior to recommending and touring any facility with the client or client's representative, Member will review any available state surveys, complaint files and/or enforcement actions. As a practice, Members will refer to options they have personally toured and researched.

ARTICLE 3

Members are to be knowledgeable of the resources in their local communities. They are to have a depth of understanding of options they are referring to. This understanding and knowledge allows the Member to give personal guidance and to find the best options available to client. Member must stay within their area of understanding and not undertake to provide opinion if outside their field of expertise and experience and will refer to professionals with the appropriate experience and expertise.

ARTICLE 4

Members will not engage in the practice of moving or relocating a previously placed client for additional economic gain nor may intentionally suggest a housing option with knowledge that it will not be a good fit with the expectation of a subsequent compensated move. Member must not be the initiator of a relocation. Relocation must be initiated by the family and/or facility after all parties have been unable to find a resolution and there is an agreement that relocation is in the best interest of the resident.

ARTICLE 5

Members will inform client, if asked, why a particular place is not recommended, however, will not interfere with client's decision to move into an option not recommended.

ARTICLE 6

Members will honor all state and federal Medicare/Medicaid policies at hospitals, skilled nursing facilities, home health and hospice companies regarding vendor visitation, gifting and compensation for referrals. Members will not pay for nor compensate employees of these companies for referrals. Appreciation gifts are not to exceed \$60/incident.

ARTICLE 7

In accordance with state and federal laws, no fee of any kind can be charged or accepted for residents placed who are already approved or accepted into any state Medicaid program.

Some states may allow for receipt of a fee for assisting the family in researching and selecting an approved state Medicaid facility. This fee is paid by the family/client representative directly to the referral agency and does not involve funds of the client who is covered under the state Medicaid program. Members will understand and comply with their state and federal laws regarding fees for assisting Medicaid clients.

ARTICLE 8

Members maintain professional and general liability insurance, minimally, in the amount of one million dollars (\$1,000,000.00) per occurrence. Member will supply a copy of proof of insurance to OSRAA prior to approval of membership and at the time of annual renewal.

ARTICLE 9

Members must disclose to their clients how they are compensated. Members will not use the amount of compensation as a basis for placement

ARTICLE 10

Members are required to recognize and report to appropriate authorities any witnessed incidents of elder abuse or suspected abuse. In addition, Members will report to licensing authorities when health or safety violation are realized by Member.

ARTICLE 11

Member will not deny service to any person for reason of race, creed, color, sex, familial status, or national origin. Member shall not be party to any plan or agreement to discriminate against a person or persons based on race, creed, color, sex, familial status or national origin. Member may limit services to person over the age of 55.

ARTICLE 12

Member will observe the By-Laws and Rules and Regulations established by OSRAA, in addition with all other statutory and regulatory requirements that apply by state and federal laws.

ARTICLE 13

Members agree not to work with a client whom Member knows to be working with another referral agency without disclosure to client of how competitor collects their fee. If client believes they are not receiving adequate assistance, Member may assist client so that client's needs are met after such information is disclosed. Member will inform client to alert other referral agency that they no longer wish to work with them.

ARTICLE 14

Member will not publicly discredit a competitor.

ARTICLE 15

In the event of a dispute between companies regarding commission earned or to be earned in connection with a client, the companies shall make every attempt to work it out between themselves.

Code of Ethics approved the 11th day of May, 2018.