



NPRA Best Practices:

NPRA agents and Certified Placement and Referral Specialists (CPRS), as well as all other NPRA Members (in the event the member is engaged in referral or placement-related activities) make a professional commitment to follow these best practices. Although NPRA does not guarantee or track the compliance of members, NPRA investigates allegations of violations when received and takes appropriate disciplinary actions.

ARTICLE I: It is the Best Practice of an NPRA agent to tour with the client or client's representative whenever possible. Touring with clients should be a regular and core practice for the NPRA agent. Prior to the tour, the agent and senior living providers should be familiar with and respect the expectations of each other regarding tours.

ARTICLE II: It is the Best Practice of an NPRA agent to disclose to their clients the nature and source of their compensation including any financial interest in or familial relationship with any provider referred.

ARTICLE III: It is the Best Practice of an NPRA agent to conduct a quality intake in order to present the options most suitable to each client's specific care needs, financial resources, and personal preferences. The intake should be communicated with full transparency to the senior living providers the client is being referred to. Agents should be respectful to the decision made by the senior living provider to accept or decline the client.

ARTICLE IV: It is the Best Practice of an NPRA agent to, whenever possible, provide multiple suitable options to the client for any resources being referred.

ARTICLE V: It is the Best Practice of an NPRA agent to review any state facility or care violation report of any and all senior living provider referred and share the results with the client or client's representative.

ARTICLE VI: It is the Best Practice of an NPRA agent to personally visit and research a senior living provider before referring the property to a client.

ARTICLE VII: It is the Best Practice of an NPRA agent to maintain professional and general liability insurance of no less than one million dollars (\$1,000,000.00) per occurrence, and two million dollars (\$2,000,000.00) aggregate or the amount required by law (if greater).

ARTICLE VIII: It is the Best Practice of an NPRA agent to respectfully decline any form of gifting beyond the customary referral fee from a senior living provider for referring a client. All gifts should be returned or re-gifted to the provider indicating the agent's appreciation for providing quality care.

ARTICLE IX: It is the Best Practice of an NPRA Agents to implement initial steps upon receiving a referral to inquire if a client is working with another Agent. If another Agent is currently with the client, the Agent should refer the client back to this Agent, unless the client has expressed specific reasons to no longer work with that Agent. In circumstances where the new Agent is not informed of another Agent's involvement until after work has substantially started or completed, both Agents should work to amicably resolve the situation without burdening the client.

ARTICLE X: It is the Best Practice of an NPRA Agents to comply with all state and federal rules regarding labor laws, as well as required state or local laws pertaining to operating a business in the appropriate county and/or city.

ARTICLE XI: It is the Best Practice of an NPRA agent to assist with the investigation by NPRA of any grievances lodged against the agent with respect to the Best Practices and should respect any disciplinary actions taken.

ARTICLE XII: Family Choice: It is the Best Practice of an NPRA agent to respect the decision of a client to use the services of another agent. If a client makes such a request in writing, the agent should cease and desist immediately from further contact with the client AND release all senior living providers or any other vendors from all obligations to remunerate the outgoing agent from his association with the client.