



## PREMIER CARE MANAGEMENT SERVICE AGREEMENT

Thank you for choosing Premier Care Management of Georgia, LLC ("Premier CMGA")

We are a team of Aging Life Care Professionals specializing in Geriatric Care Management services to support clients and their families as they navigate the complexities of aging and disability.

Our services encompass a comprehensive approach, including assessment, care planning, implementation, and ongoing evaluation. We also provide advocacy, guidance in exploring care options, assistance with housing and healthcare management, effective communication, and thorough documentation—such as phone calls, texts, and emails—along with other essential care management services.

Please note that any work performed on behalf of the client or for the benefit of the client and their family is considered a billable expense.

Premier CMGA also provides Daily Money Management and Senior Move Management services. Detailed descriptions of these services, along with our care management offerings, can be found in the attached document titled "Our Premier Services"

### PREMIER CARE MANAGEMENT FEES:

**Retainer:** To initiate services, we require a retainer of \$500, which is paid in advance. This retainer will be applied to your bill and is fully refundable until the in-person assessment has been completed.

#### Care Management Services

- **Regular Business Hours (Monday–Friday, 8 AM–5 PM):** \$150.00 per hour, billed in 6-minute increments.
- **After Hours, Weekends, and Federal Holidays:** \$200.00 per hour, billed in 6-minute increments.

#### In-Person Services have a minimum of one hour for the visits and include travel expenses:

- **Travel Time:** \$75.00 per hour
- **Mileage Reimbursement:** \$0.70 cents per mile for 2025 (subject to annual adjustments based on IRS standards)

Any personal expenses incurred on behalf of the client or at the request of the client are billed at their actual cost, accompanied by a receipt for full transparency. We are committed to maintaining clarity and openness in our billing process.

### **Care Consultation with Tracy Johnson, RN, CEO of Premier CMGA**

- Hourly rate of \$225.00 with ½ rate for travel and \$0.70 cents per mile.

### **Aging Solo Care Management**

This service includes an initial membership fee as well as an annual fee. For detailed information, please refer to the addendum provided if you have chosen to enroll in this service.

### **Daily Money Management or Benefits Specialist Services:**

- \$85.00 per hour (minimum of one hour per month required)
- Travel: \$42.50 per hour (half rate) and \$0.70 cents per mile
- *Note:* A separate agreement will be provided after a detailed assessment of your requirements.

### **Senior Move Management Services:**

- \$75.00 per hour
- Travel: \$37.50 per hour (half rate) and \$0.70 cents per mile
- *Note:* A separate agreement will be provided after a detailed assessment of your moving requirements.

### **Care Manager Assistant Services:**

- \$60.00 per hour
- Travel: \$30.00 per hour (half rate) and \$0.70 cents per mile

### **BY YOUR SIGNATURE BELOW, YOU ACKNOWLEDGE AND AGREE TO THE FOLLOWING TERMS:**

#### **Fees and Payment**

Premier CMGA reserves the right to adjust service fees with thirty (30) days' prior written notice.

- **Invoicing:**
  - Monthly invoices will be issued for services performed during the previous month.
  - If services end within the month, a final invoice will be sent, and payment will be collected within two business days.
- **Payment Terms:**
  - Payment in full is due upon receipt of the invoice without any withholding or deductions.
  - Accepted payment methods:
    - **Check or ACH Authorization:** No additional fee.
    - **Credit/Debit Card:** A 3.5% convenience fee will be applied.
  - Auto-draft via ACH or Credit Card (whichever you chose to be on file) occurs five (5) days after invoicing.

- **Invoice Questions:**

- For any questions regarding an invoice, please contact our office within five (5) days of receiving it.

- **Late Payments**

- Any amount remaining unpaid after thirty (30) days are considered overdue and will incur a late fee of 5% of the unpaid balance.
- By using our services, you authorize Premier CMGA to charge the outstanding invoice amount, along with the applicable late fee, to the ACH account or credit card on file.
- If you have any questions about your payment or need assistance, please contact our office promptly to avoid delays or additional fees.

- **Term and Termination**

- Services will commence on the date you sign this Service Agreement.
- To remain a client, you agree to a minimum of a monthly visit.
- You may modify or discontinue any services at any time by providing written notice to Premier CMGA.
- Premier CMGA reserves the right to terminate any service at any time, with or without cause, by notifying you of the termination. If applicable, we will provide a referral to an alternative resource to ensure continuity of care.

- **Referrals to Other Providers**

- Premier CMGA may refer you to external providers, such as home health workers, aides, companions, or other medical and nonmedical personnel, who are not employees of Premier CMGA.
- While we strive to recommend only reputable, high-quality providers, Premier CMGA cannot guarantee their actions or assume responsibility for their performance. By accepting these referrals, you agree to hold Premier CMGA harmless from any claims arising from your interactions with, or the services provided by, these third-party providers.

- **Limited Warranty**

- Premier CMGA warrants that Care Management Services will be performed in a professional manner, consistent with the quality standards upheld by reputable, qualified providers of comparable services. However, Premier CMGA does not guarantee the specific results or outcomes of any services provided.
- Consulting Services are advisory in nature and are provided without any warranty of any kind.
- Except as explicitly stated above, Premier CMGA makes no other warranties, whether express or implied, including but not limited to warranties of merchantability, title, non-infringement, or fitness for a particular purpose. This limited warranty does not affect any warranties that cannot be excluded or limited by applicable law.

- In the event of a breach of warranty, your exclusive remedy is the reperformance of the services, or if reperformance is not possible or conforms, a pro-rata refund of the applicable fees paid for the non-conforming services.
- **Limitation of Liability**
  - To the fullest extent permitted by law, Premier CMGA shall not be held liable to you or any other party for any indirect, consequential, exemplary, special, incidental, or punitive damages. This applies regardless of whether the damages arise from breach of contract, tort (including negligence), product or strict liability, or any other legal action, even if such loss or damage was foreseeable or you were advised of the potential for such loss or damage. This applies notwithstanding the failure of any limited remedy's essential purpose.
  - Premier CMGA's total liability for any loss or damage will be limited to the amounts paid for services in the one (1) month immediately preceding the initial event that gave rise to the claim.
- **Privacy and Confidentiality**
  - Premier CMGA is committed to safeguarding the privacy of your information, including individually identifiable health information (referred to as protected health information, or "PHI"). In the course of providing services, Premier CMGA may create or have access to records concerning your healthcare treatment and services.
  - Premier CMGA is legally required to maintain the confidentiality of such information and to provide a notice detailing our legal duties and privacy practices related to PHI.
  - By signing below, you acknowledge receipt of Premier CMGA's **Notice of Privacy Practices** and authorize Premier CMGA to use and/or disclose certain PHI about you as necessary, in accordance with the guidelines set forth in our Notice of Privacy Practices.
- **Driver's Release**
  - If you request or require Premier CMGA to provide transportation services, you understand and acknowledge that Premier CMGA, along with its officers, employees, contractors, and representatives, are not liable for any injuries, damages, loss, or suffering resulting from such transportation services. This includes transportation in a vehicle provided by you, Premier CMGA, or a third party, unless such injuries are directly caused by the gross negligence or willful misconduct of Premier CMGA or its officers, employees, contractors, or representatives.
- **Governing Law**
  - The laws of the State of Georgia, without regard to its conflict of laws principles, will govern all matters arising out of or relating to the provision of services by Premier CMGA. You irrevocably agree to submit to the non-exclusive jurisdiction of any State or Federal Court in Fulton County, Georgia, and waive any objections you may have now or in the future regarding that venue as being inconvenient.

• **Authorization for Release and Disclosure of Protected Health Information**

- Premier CMGA may coordinate your care with others, including any family members or friends you have designated during the care management process. By signing below, you agree to allow Premier CMGA to share your progress and treatment information with these designated care partners.
- If you prefer not to have information shared with any individuals involved in your care, please provide us with a written statement identifying those persons. You may send this statement to our physical address below or via email at [Tracy@PremierCMGA.com](mailto:Tracy@PremierCMGA.com).

**Acknowledgment**

I confirm that I have read and understand this Service Agreement. I have had the opportunity to ask questions, and all my questions have been answered fully and to my satisfaction.

Client or Responsible Party Signature: \_\_\_\_\_ Today's Date: \_\_\_\_\_

Relationship to Client: \_\_\_\_\_

Responsible Party Name: \_\_\_\_\_

Responsible Party Address: \_\_\_\_\_

Responsible Party Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Care Recipient's Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Care Recipient's Address: \_\_\_\_\_

Care Recipient's Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Billing Address: 7380 Spout Springs Road | Suite 210 #351 | Flowery Branch, Georgia 30542

Office Location: 3355 Lenox Road | Suite 750 | Atlanta, Georgia 30326

Office Phone: 404-430-5307 | Fax: 678-828-5581 | [www.PremierCMGA.com](http://www.PremierCMGA.com)



### Electronic Direct Deposit (ACH Payment) Authorization Form

- Before completing this form, call the ACH contact at your financial institution to clarify if there are any fees related to this service.
- Once ACH payments are effective, remittance information will be sent to you via email. Please provide email address in section indicated below.
- Each entry will be for the amount of invoices presented by Premier Care Management of Georgia, LLC for payment and will be transmitted to your financial institution based on the payment terms that you have already agreed upon with Premier Care Management of Georgia, LLC.

[ALL FIELDS IN THIS SECTION ARE REQUIRED]

<b>BANK ACCOUNT HOLDER'S NAME</b> _____	
<b>NAME AS IS ON INVOICE</b> _____	<b>If different, CLIENT NAME</b> _____
<b>BANK ACCOUNT HOLDER'S REMIT TO ADDRESS</b> _____	
_____	
<b>TELEPHONE NUMBER</b> _____	
<b>CONTACT NAME</b> _____	
I (we) hereby authorize Premier Care Management of Georgia, LLC to initiate credit entries to my (our) checking account indicated below at the depository financial institution named below. <i>This is a first time setup</i> [ ] <i>This is an monthly setup</i> [ ]	
<b>SIGNATURE</b> _____	
<b>BANK NAME</b> _____	
<b>ABA ROUTING NUMBER</b> _____	
<b>CHECKING ACCOUNT NUMBER</b> _____	
<b>REMITTANCE EMAIL ADDRESS</b> _____	

Return completed form by faxing the form to (678) 828-5581 Attn: Premier Care Management of Georgia, LLC, or by emailing form as an attachment to [Michael@PremierCMGA.com](mailto:Michael@PremierCMGA.com) with Electronic Payment Authorization in the subject line.



## Notice of Privacy Practices

At Premier Care Management of Georgia, LLC, we are committed to maintaining the privacy and security of your personal health information. This Notice of Privacy Practices outlines how we collect, use, and protect your information in accordance with the Health Insurance Portability and Accountability Act (HIPAA) regulations.

### 1. Information We Collect:

As a geriatric care management firm, we may collect various types of personal health information necessary for providing you with the best possible care. This may include, but is not limited to, your name, contact details, medical history, current health conditions, treatment plans, and any other relevant information including financial information.

### 2. Use and Disclosure of Information:

We use and disclose your personal health information for the following purposes:

- Providing and coordinating your geriatric care management services
- Communicating with healthcare providers involved in your care
- Facilitating insurance claims and billing processes
- Conducting quality assessment and improvement activities
- Complying with legal and regulatory requirements
- Research and educational purposes (with appropriate de-identification)

### 3. HIPAA-Protected Software:

Premier Care Management of Georgia, LLC acknowledges that it utilizes third-party software services to support its operations, including the documentation and storage of personal health and financial information as well as a call answering service. We have selected the most reputable companies for secure software provider services. We cannot guarantee the absolute security of these external systems. These companies have their own Privacy Notices and can be found here: CareTree <https://www.caretree.me/privacy>, Intuit, Inc. <https://quickbooks.intuit.com/hk/privacy/> and AnswerFirst <https://answerfirst.com/privacy-policy/>

Therefore, the following clause is included to clearly outline our limitations of liability in the event of a breach in security by these third-party software providers:

- a) Premier Care Management of Georgia, LLC shall not be held responsible or liable for any breach of security, unauthorized access, loss, or misuse of personal health/financial information that may occur within the systems or software services provided by third-party vendors.

4. Your Rights:

As a client of our geriatric care management services, you have certain rights regarding your personal health information. These include:

- The right to access and obtain a copy of your health records
- The right to request corrections or amendments to inaccurate or incomplete information
- The right to request restrictions on certain uses or disclosures of your information
- The right to receive confidential communications of your health information
- The right to file a complaint if you believe your privacy rights have been violated

5. Our Commitment to Privacy:

We are committed to protecting your privacy and maintaining the confidentiality of your personal health information. Our staff undergoes regular training to ensure compliance with HIPAA regulations and to reinforce our commitment to safeguarding your information.

6. Changes to the Notice:

We reserve the right to update or modify this Notice of Privacy Practices as necessary. Any changes will be promptly communicated through our website and should be reviewed regularly.

If you have any questions or concerns, please contact the leadership team at Premier Care Management of Georgia, LLC at 404-430-5307, or via email at Tracy@PremierCMGA.com.

Thank you for entrusting Premier Care Management of Georgia, LLC with your care. We value your privacy and are dedicated to providing you with the highest standard of service.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Relationship to the client (if signed by a personal representative of the client:

\_\_\_\_\_



## **OUR PREMIER SERVICES**

At Premier Care Management of Georgia, our team of experienced RN Care Managers and Geriatric Care Managers provide the best possible guidance with options and solutions for seniors and their families in times of challenge and need. We work closely with families and healthcare providers to facilitate a client-centered approach to caring for seniors or others facing health challenges. To accomplish this objective, our Care Managers encourage as much independence as possible while addressing and resolving any safety or security issues that may emerge. Based upon a thorough and personalized assessment we work closely with our senior clients and families to implement care plans that enhance quality of life. Caring for an elderly loved one or planning for your own care can be overwhelming, often raising questions and concerns about a wide range of issues. We can help!

Professional care management ensures a supportive, thorough, and effective process and includes a range of services to help address senior clients' healthcare, emotional, functional, legal, financial, and other needs. Our aging life care professionals are problem solvers, advocates, service coordinators, and counselors. With an established professional network, we have an intimate knowledge of resources in the community.

### **CARE PLANNING**

- Comprehensive care assessment, planning and implementation
- Modification of plan in consultation with client and family, as circumstances change
- Complex problem-solving
- Liaison for families not local by provide long-distance care and oversight

### **CRISIS INTERVENTION**

- Helping clients navigate through transitions of care such as the emergency department, hospitalization, rehabilitation and home care
- Oversight of rehabilitation stays and ensuring that adequate care is available to the client
- For families that live at a distance, we are a 24/7 emergency contact

### **HEALTH MANAGEMENT**

- Regular health check-ins and assessment
- Interact with the health care system effectively ensuring smooth communications
- Escort client to medical appointments and serve as a strong advocate to doctors and healthcare providers
- Facilitate communication between doctor, client, and family

- Deliver specialized care services: monitoring complex medical conditions
- Management and oversight of home health and hospice services
- Medication review and management

#### **ADVOCACY, EDUCATION AND SUPPORT**

- Providing coaching, guidance and support
- Client and family education and advocacy services
- Promoting the client's wishes with healthcare and other providers
- Represent the client as needed and ensuring that the client's needs are being adequately addressed

#### **FINANCIAL**

- Working to identify cost savings options and ensure the preservation of client's assets
- Daily money management and/or consulting with client's accountant or power of attorney
- Provide information on federal and state entitlements
- Connecting client and families to local programs when appropriate
- Help clients and families with insurance concerns, claims, and applications
- Connect client and families to appropriate professionals and agencies as needed

#### **STAFF MANAGEMENT**

- Researching and recommending appropriate in-home care services
- Home care plan review and oversight
- Family caregiver coaching, resources and encouragement
- Arrange & monitor home care staff and services

#### **HOUSING AND PLACEMENT**

- Assessment to determine appropriate placement for level of care services
- Recommendations and negotiation with assisted living communities, memory care or skilled nursing home facilities
- Assisting with the client's move into or transition from a retirement community or nursing care facility. Senior Move Management services to downsize, declutter and move belongings for client.

#### **SENIOR MOVE MANAGEMENT**

Senior Move Management is the profession that assists older adults, individuals, and families with downsizing, relocation or simplifying their homes.

- Developing an overall move or "age in place" plan
- Organizing, sorting and downsizing
- Customized floor plans

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- Developing an overall move or "age in place" plan
- Organizing, sorting and downsizing
- Customized floor plans
- Arranging for the profitable disposal of unwanted items through auction, estate sale, buy-out, consignment, donation, or a combination of the above
- Interviewing, scheduling and overseeing movers
- Arranging shipments and storage
- Supervise and oversight of professional packing
- Unpacking and setting up the new home
- Related services, such as cleaning, waste removal, shopping, senior escort, assisting with selection of a realtor and helping prepare the home to be sold.

## **DAILY MONEY MANAGEMENT**

Daily Money Managers bring clarity and order to their clients' daily management of bills, budgets and record-keeping. The goal is to keep our clients financially organized, timely on payments and with clear communication.

Typical services might include:

- Reviewing mail with the client and deciding what to pay and what to discard,
- Preparing bills for payment electronically or manually,
- Bank statement reconciliation,
- Making bank deposits,
- Organizing tax related information and paperwork,
- Setting up files and electronic or manual record-keeping systems, and
- Coordinating with the client's professional advisors such as attorneys, investment and tax professionals.

## **DEMENTIA COACHING THROUGH THE ZOOM PLATFORM**

Dementia Specialty Care Managers are available to assist with dementia coaching and care coordination remotely. Clients and their families can schedule an hour (or more) to address specific concerns via the Zoom platform. Follow up email with the resources are available at the end of the session.

**Premier Care Management of Georgia, LLC**

**Main Location: 3355 Lenox Road, Suite 750, Atlanta, GA 30326**

**Phone: 404-430-5307 Fax: 678-828-5581**

**Billing Address: 7380 Spout Springs Rd, Suite 210-351**

**Flowery Branch, GA 30542**

**Website: <https://www.PremierCMGA.com>**