



Written by:  
**Donna Rybacki,**  
CSA, CPRS, RCFE  
Vice President  
National Placement and  
Referral Alliance  
Orange County, CA

## CHOOSING LONG-TERM CARE FOR AN ELDERLY CLIENT: HOW TO GET QUALITY GUIDANCE AND PROFESSIONAL SUPERVISION

### Long Term Elder Care Needs

When your elderly client, family member or loved one can no longer remain safe and healthy at home, the idea of moving them into a long-term care facility can be frightening. There are many types of long-term living options to choose from and most families and other professionals are unaware of the differences and the services offered.

In California, each county has thousands of licensed facilities (communities, and homes); choosing the right one will bring about improvement and a high quality of life. Conversely, choosing the wrong one can lead to disaster. To do this, you need *quality guidance and professional supervision*. Partnering with an educated, experienced and ethical placement agent is necessary.

### Choosing an Experienced and Qualified Agent

Like the specific questions that families should ask when hiring a professional fiduciary, this is also true of hiring a Senior Placement Professional (often referred to as Senior Placement or Referral Specialist, or Referral Agent). However, Senior Placement Specialists or Referral Agents are not yet regulated in the state of California. Therefore, quality and extent of services can vary.

Although not required from state to state, there is a National Certification that is available to Referral and Placement agents. [That registry can be accessed here.](#)



### National Registry of Certified Placement and Referral Specialists

If you are unable to access a certified specialist in your area, it is recommended that the family, legal guardian or other professional ask questions to make sure the agent they are considering has sufficient experience and is knowledgeable about the geographical area and local resources.



Certification  
Program

Continued on Back



**Examples of applicable knowledge and experience include:**

- The referral/placement agency should have a business license and liability insurance, including Errors and Omissions.
- The referral agent(s) should have additional certification or credentials that show their knowledge or professional experience in eldercare. Examples include a degree in Gerontology, RN, or a CSA® (Certified Senior Advisor) and RCFE Administrator Certificate Residential Care Facility for the Elderly.
- The agent should refer to the department of social services, or a community care licensing website [DSS CCLD WEBSITE](#) to view each facility or home recommended for citations or violations of state law.
- The agent should have personally visited and vetted a home or community and know the reputation of the places they recommend.
- The agent should provide in-person touring and visiting of the options suggested when possible.
- The agent should ask detailed questions about the elderly client's care needs and personality in order to ascertain the priorities such as; age, present health conditions, care requirements, cognitive abilities, religious or spiritual interests, personality, hobbies, interests, preferred geographic location and budget.
- The agent should work together with the family or guardian and educate them until a sound judgment is made. The family or guardian is always responsible for the final decision.



## Special Circumstances that Require More Experience

Each RCFE in California is equipped with protocol and exact plans when there is a crisis or natural disaster such as an earthquake, flood, wildfires, or a pandemic. Understanding this protocol and how to access this before placement is imperative. Require that the agent find out the current protocol ahead of time and discuss this with you before any touring is initiated.

**NOTE: Currently, there are restrictions in California for communities and homes due to the COVID-19 Pandemic.** These need to be known ahead of time before suggesting an option. Many communities are not allowing the resident's families to visit, which for some, especially those affected with dementia or other cognitive impairment, could be unworkable. Since each client case has its own individual and unique set of circumstances, this information is essential for a successful placement.



## Pitfalls of The On-Line Search

Be aware when shopping on the Internet for long-term eldercare. Personal information entered on a website may be released to others or even sold to other companies. Many people don't read the fine print on the privacy policy. Often it states, the website reserves the right to disclose, sell or share personal and contact information with third parties.

*Note: Placement agencies services are offered at no cost to families. Similar to a rental or employment agency, the placement agency will often receive compensation from the facilities after a resident moves in.*