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# RACHAEL A. CABRAL-GUEVARA

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STATE SENATOR • 19<sup>TH</sup> SENATE DISTRICT

*Testimony before the Senate Committee on Health*

*Senator Rachael Cabral-Guevara*

*June 4, 2025*

Hello, members of the Senate Committee on Health. Thank you for allowing me to provide testimony on Senate Bill 262, a bill that will establish essential transparency and fairness to the operations of assisted living referral agencies in Wisconsin.

As our population ages, more Wisconsin families are relying on referral agencies to find a long-term care solution. These agencies play an important role in guiding families and their loved ones to find the right care setting; however, the industry currently lacks certain consumer protections to ensure the process is transparent and centered on the needs of our parents and grandparents.

This proposal creates several important sets of standards for referral agencies to achieve that goal. It requires referral agencies to disclose any contractual relationships they have with assisted living facilities to patients. Families deserve to know whether a recommendation is based on care quality, not the value of the prospective resident to an assisted living facility.

The bill also requires disclosure of any fees paid by the assisted living facility for the resident referral. This reinforces accountability and ensures that financial incentives are not hidden from those making critically important care decisions for their loved ones. This aligns with principles of consumer protection already existing in other sectors, including financial advising.

The bill also creates a standardized fee structure to help put guardrails around industry practices. It only allows one fee collection per resident, eliminating the possibility of multiple or duplicative charges for the same resident. It also prohibits the collection of referral fees if the resident does not move in within one year, ensuring that referral payments are tied to actual placements and services rendered, rather than speculative referrals.

These types of baseline ethical standards are what Wisconsin seniors and their families deserve. Other states, including Washington and Arizona, have taken similar steps with strong bipartisan support.

I am hopeful you are able to support this critical step towards protecting our parents and grandparents as they look for the right fit for their long-term care needs. Thank you for your time.



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# RICK GUNDRUM

STATE REPRESENTATIVE • 58<sup>TH</sup> ASSEMBLY DISTRICT

## Testimony on Senate Bill 262

Senate Committee on Health | June 4, 2025 | Room 300 Southeast

Thank you for giving Senate Bill 262 a public hearing. This bill hopes to bring greater transparency into how senior living referral companies work.

SB 262 imposes several requirements related to referring individuals to an assisted living community in exchange for a fee collected from a community. Under this bill, a referral agency would be required to disclose any relationship it has with an assisted living community, any fee a community pays to the agency and the fact that the agency lists on its website only those assisted living communities with which the agency has contractual relationships.

This legislation is much needed, considering the growing number of aging adults across the country, and the fact that navigating Wisconsin's long-term care system can be complicated for the average individual. As a result, assisted living facilities, and "referral agencies," have become a prevalent entity in the marketplace, offering consulting services to help individuals and their families find a place for their loved one to call home. Often times, these referral agencies advertise this as a free service.

However, the reality is that it isn't free – because nothing in life is ever free. SB 262 will help consumers to clearly understand that the assisted living providers they are being referred to by these agencies have a contract and the fees and costs are being ultimately passed down to them.

While playing a bigger role in the marketplace, referral agencies have very little oversight. To conclude, some other states regulate assisted living referral agencies to promote transparency by having them disclose business relationships with facilities and how they are compensated, ensuring consumers can make informed decisions.

Thank you for your time, and I look forward to answering any questions that you may have on this much needed legislation.

Good morning Chairperson and members of the committee,

Thank you for the opportunity to speak today. My name is Kate Brunner, and I'm the proud owner of a small senior care business based right here in Wisconsin. I've worked in senior living since 1996, and I'm here today not just as a business owner, but as a daughter, a neighbor, and someone who has dedicated her life to serving Wisconsin families—especially during some of the most challenging times they'll ever face.

My family has deep roots in senior advocacy. It's personal for us. At 37 years old, despite a combined 100 years of experience in healthcare between myself and my loved ones, I still found myself completely overwhelmed when it came time to help my mom find care for my dad—my hero—at just 65. We didn't know where to start. And that's when I realized just how broken and confusing this process can be, even for professionals.

He is my *why*.

I dissolved my 401(k) and invested it into this franchise—not for profits, but for purpose. I started this business as a single mom with two girls. I wanted to be the person that families like mine could turn to when they felt lost. When they needed help, hope, and someone who would go the extra mile.

My first client had no family. He had limited resources, but one wish: to die at home, surrounded by his dog, his fish, and his flower garden. I spent two days making that happen. I grocery shopped, met with hospice, set up his bed by the window so he could see his garden. He was a retired zoo keeper, and elephants were his favorite. I went to five stores just to find a stuffed elephant to bring him joy and peace in his final days.

The day I picked him up from the hospital and brought him home, he smiled through his tears. That moment—that smile—was my payment. And it reminded me why I do this work.

This is servant leadership at its finest. It's empathy, expertise, and compassion wrapped in action. It's being a daughter, a helper, a trusted guide—whatever the family needs, we are there.

As Wisconsin-based small businesses, we're not part of some national chain or distant corporation. We live here. We raise our families here. And we care deeply about our neighbors—especially the vulnerable seniors who deserve to be treated with dignity and love in their final chapters.

We aren't just providing services. We are easing burdens, offering guidance, and becoming part of our clients' families. We are here because we believe every Wisconsin senior deserves to age with respect, comfort, and peace.

So, I leave you with this: We are small businesses, yes—but our impact is anything but small. We serve the people of Wisconsin with our whole hearts, and all we ask is that you remember the difference we make in lives each and every day. Thank you



Greater Wisconsin  
Agency on Aging Resources, Inc.

Date: June 4, 2025

To: Chairwoman Cabral-Guevara and Members of the Senate Committee on Health

From: Janet Zander, Advocacy & Public Policy Coordinator

Re: **Support for SB 262** – Assisted Living Facility Referral Agencies

Thank you for this opportunity to share testimony in support of SB 262. The Greater Wisconsin Agency on Aging Resources, Inc. (GWAAR) is a nonprofit agency committed to supporting the successful delivery of aging programs and services in our service area consisting of 70 counties (all but Dane and Milwaukee) and 11 tribes in Wisconsin. We are the largest of three area agencies on aging (AAAs) in Wisconsin. Our mission is to deliver innovative support to lead aging agencies, as we work together to **promote, protect, and enhance the well-being of older people in Wisconsin.**

In accordance with our mission, we believe older consumers and their families should have access to comprehensive, unbiased information to empower them to make informed decisions. This requires those providing information to be knowledgeable regarding all services or facilities available to meet someone's needs and to in no way personally or professionally benefit from the choices consumers make. Here in Wisconsin, we have an excellent system in place in our publicly funded Aging and Disability Resource Centers (ADRCs) for older adults, people with disabilities, and their families to receive free, unbiased, and comprehensive information to help them make informed decisions. Based on reliable information, consumers can choose the right care option for their needs or the needs of a loved one.

Not everyone knows about the ADRCs, and some people may wish to get their information from other sources; we support that right but strongly believe consumers should be able to expect that any information shared will be complete and that any conflicts of interest will be disclosed.

GWAAR supports SB 262, as this legislation requires referral agencies to provide consumers with disclosure agreements outlining any relationships between the referral agencies and any assisted living facilities, any fees received from a facility in exchange for the referral, and if the referral agencies' information (list of facilities) is restricted to only facilities they have a contract with and/or those that do not accept Medicaid. Further, establishing a fixed fee for assisted living facility providers to pay for these referrals will eliminate existing incentives for referral agencies to refer consumers more frequently to higher cost facilities which provide them with larger reimbursements and more quickly spend down consumers available financial resources. Consumers are seeking information to help them find the care that best meets their health and financial needs; the options they are presented should not have less to with their needs and more to do with how large the kick back is to the referral agency.

A transition from home to any type of facility can be an extremely difficult time for individuals and their families; incomplete or misleading information can result in someone choosing a facility that may not be the best fit and potentially require yet another move, causing further stress.

SB 262 will help to ensure Wisconsin consumers seeking information about assisted living facilities are not misled and will hold referring agencies accountable for fully disclosing any limitations or restrictions regarding the information they provide. We appreciate the interest in and efforts of policy makers to put the needs of long-term care residents first and to protect consumers seeking options for assisted living care. We look forward to continuing to work with you on policies that improve the quality of life of older people in Wisconsin.

Thank you for your consideration of these comments and recommendations related to SB 152.

Sincerely,

Janet Zander  
Advocacy & Public Policy Coordinator, MPA, CSW  
Greater Wisconsin Agency on Aging Resources  
[janet.zander@gwaar.org](mailto:janet.zander@gwaar.org)  
(608) 228-7253

## **Testimony Opposing Senate Bill 262**

*Michelle McGovern, A Place for Mom  
Senate Committee on Health*

Chair and Members of the Committee,

Thank you for the opportunity to speak today. My name is Michelle McGovern, and I am the General Counsel of A Place for Mom, the nation's leading senior living advisory service. I'm here to respectfully but firmly oppose Senate Bill 262.

We support transparency and educated decision-making, for all families seeking assisted living for a loved one. Families should know who we are, how we operate, and who pays us. But SB 262 goes far beyond transparency.

It introduces unprecedented government intrusion into private business contracts—including setting rates and dictating contract terms between two independent businesses. This kind of regulatory overreach threatens free market principles and sets a troubling precedent for any industry built on voluntary partnerships. As longstanding partners to assisted living communities, we support giving these communities' options to outsource functions that are more efficient at scale, like marketing.

### **Who We Are and How We Help Families**

A Place for Mom helps families navigate one of life's most emotional decisions: finding the right senior living option for a loved one. In 2024, over 40,000 Wisconsin families turned to us for help—at no cost to them.

We don't require contracts with families. Our advisors offer personalized referrals based on care needs, family preferences (such as religious diet needs or pet-friendly living situations), budget, and location. We do not collect HIPAA-protected medical data or provide medical assessments. Our role is advisory, non-exclusive, cancelable at will – and entirely optional. Families are always free to use multiple referral sources—or none at all—and they often do. In today's market, caregivers rely heavily on online research to evaluate senior living options. With 25 years of experience, we are simply one of many tools they use.

### **How the Process Works**

Once a family agrees to receive referrals, we take a careful and responsible step: we reach out to the facility to confirm whether the family has already connected with them. This provides our contracted facility partners the opportunity to confirm whether they have an existing relationship with the referred family – and to ensure that they only pay referral fees for families who would not otherwise have known that they are a good fit for the community.

Only if a family moves into a referred community are we paid a success-based fee. This ensures we are accountable for results- and that results are right-sized for the community and ultimately the family. But even if a move-in never occurs, the community still benefits from the extensive marketing services we provide—services that would be significantly more expensive for a provider to replicate independently, particularly at scale.

## **The Business Relationship**

Our agreements with communities are voluntary and cancellable at any time, for any reason, with just 30 days' notice. These are standard, negotiated – and often longstanding - business arrangements, not hidden contracts. In addition, many larger communities' contracts cover many states' worth of referrals – they benefit from negotiating at scale, and outsourcing marketing across the country to referral services.

And unlike what the bill suggests, we don't bill indefinitely. Our “life of lead” is generally capped at two years—based on data showing that families often begin searching for the right care setting years before they're ready to make a move. This timeline reflects real consumer behavior, not opportunism.

## **Why SB 262 Is Harmful and Unnecessary**

### **1. Government Overreach into Private Business Contracts**

This bill inserts the state into private, negotiated business agreements—dictating how businesses are paid, and under what terms services can be delivered. It is an extraordinary example of government overreach into private-sector contracting and rate-setting—something we believe would not withstand legal scrutiny under established contract law.

### **2. Unwarranted Involvement of Families in Business Contracts**

Families are not parties to our contracts. Forcing them to confirm that they received our free, nonexclusive services – which should more naturally rest with the community accepting the contracted referral – involves them in a process that they didn't ask for, during an already stressful time. Asking them to do the work that has been agreed to in negotiated contracts between communities and APFM creates confusion and offers no real benefit. Worse, it may dissuade families from using trusted advisory services – ours, or others.

### **3. Reduced Access and Increased Costs**

This bill penalizes one of the most effective and consumer-friendly ways families access senior living options. It does nothing to regulate lower-quality or opaque models and risks reducing consumer choice and access—especially for smaller or rural communities, for whom flat fees may be cost-prohibitive, cutting off an effective and efficient source of marketing and referrals.

## **Transparency Already Exists**

We already disclose our business model on our website, in writing, and in advisor conversations. It's in our emails and even in national advertising. Families understand we're paid by communities—not by them.

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## **In Conclusion**

SB 262 is a solution in search of a problem. It risks real harm to seniors and families by reducing access to services they trust, increasing regulatory burdens, and undermining private business relationships.

While presented as a consumer protection measure, it appears this legislation is being driven by certain industry stakeholders seeking to use the legislative process to renegotiate the terms of their private contracts—simply because they don't like the competitive dynamics and technology-driven efficiency that modern referral services bring to the marketplace. That is not an appropriate role for government regulation.

We urge you to reject SB 262 and instead support practical, targeted transparency efforts that inform families without interfering in the healthy, voluntary partnerships that help connect seniors with the care they need.

Thank you, and I welcome your questions.

## **Testimony on SB-262 – Lauren O’Desky**

Good afternoon, Chairwoman and members of the committee,

My name is Lauren O’Desky. I’m the proud owner of Oasis Senior Advisors of Southeast Wisconsin and Madison. I’m a small business owner, a Wisconsinite, and a mother of three—including a new Badger heading to UW this fall. For the past eight years, I’ve poured my heart and soul into building a company that helps families during the hardest moments of their lives. It’s the kind of support I wish I had when I needed it most.

Since 2017, we’ve helped more than 17,000 Wisconsin families—farmers, teachers, attorneys, legislators, veterans, and adult children unsure what to do next. We even helped a former Governor and his wife as he transitioned from hospital to hospice. She had all the resources in the world, but still sat across from me, eyes brimming with tears, overwhelmed and confused. We helped her understand and access her options for the Governor. THAT is what’s at stake.

We show up for Wisconsin seniors and their families. In kitchens, in hospital rooms, at coffee shops and on back porches. We walk side by side with

about a sleepy little 8-bed home that would be perfect for your mother or father. This will be at great cost to the state and great loss to quality of life.

This bill, as written, would eliminate my business. It would eliminate dozens of other Wisconsin small businesses like mine. And it would leave families with only the internet and the places they might pass on their way home.

If there are individuals in this industry who are not operating ethically, then communities shouldn't contract with them. These agreements are voluntary. But please—don't punish all of us. Don't eliminate the very people who show up for Wisconsin families when no one else can.

Please vote NO on SB-262 as written. Let's form a stakeholder workgroup to craft something better—something that protects families without crushing the people who serve them.

You may never need someone like me. But one day, someone you love might. And I hope we'll still be here when they do.

Thank you for your time and your service to Wisconsin's seniors—and to those of us who walk beside them.

# WHAT OTHERS ARE *Saying about Us*



"As the Executive Director, working with Oasis Senior Advisors is always a great experience. Their team is professional, compassionate, and committed to helping seniors and their families. They always keep open communication with us and a shared goal of providing the best support for our mutual residents and families. It's a privilege to work alongside such a dedicated team!"

-Valued Community Partner



We will forever be grateful to you for getting mom moved. It has really helped us deal with this. Thank you! "

-Family Member



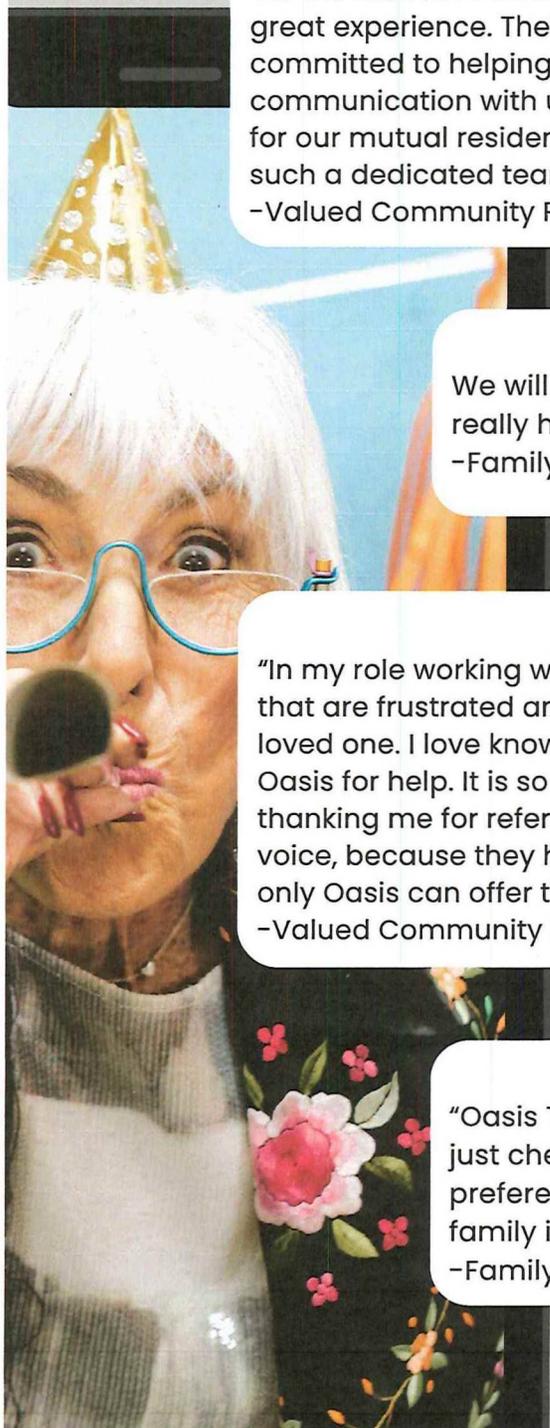
"In my role working with the senior population, I often run into families that are frustrated and overwhelmed with finding the right fit their their loved one. I love knowing that I can direct them to Kate and her team at Oasis for help. It is so rewarding when I get a call back from that family thanking me for referring them to Oasis, and I can hear the relief in their voice, because they have received the personal care ad attention that only Oasis can offer them. "

-Valued Community Partner



"Oasis Truly took the time to understand our family's needs – not just checking boxes, but genuinely listening to my mom's preferences, medical needs, and even her personality. Kate became family in one of the most emotional decisions we've had to make."

-Family Member





**To:** Senator Rachael Cabral-Guevara, Chair  
Members of the Senate Committee on Health  
**From:** Michael Pochowski, President & CEO  
**Date:** Wednesday, June 4, 2025  
**Re:** Senate Bill 262 - Support

The Wisconsin Assisted Living Association (WALA) represents approximately 2,000 assisted living facilities which includes community-based residential facilities (CBRF), residential care apartment complexes (RCAC), and adult family homes (AFH).

On behalf of WALA, we support Senate Bill 262 which would provide greater consumer transparency and protections with regard to assisted living facility referral agencies and provide a level playing field.

### **WALA's Key Positions on Senate Bill 262**

- WALA is a strong advocate for this type of legislation in an effort to bring greater transparency to how referral agencies work and their contractual relationships with assisted living facilities.
- Referral agencies are becoming more prevalent in the marketplace, particularly as the state's population continues to age and more families are looking at assisted living options for loved ones who need those types of services.
- WALA supports greater consumer protections so that individuals and families understand that there is a contract between referral agencies and the assisted living providers to which they are being referred.
- While referral agencies often advertise their services as free to prospective clients, there is usually a cost involved—one that is typically paid indirectly by the consumer.
- Referral agencies cannot receive referral fees for prospective Medicaid residents, which means referrals are going only to assisted living providers that contract with a referral agency. In fact, referral agency fees are typically 85% - 100% of the resident's first month of rent and care. This can equate to upwards of \$12,000 per resident. Therefore, referral agencies are referring elderly individuals to the most expensive facility to obtain the highest fee. As a result, consumers may not be receiving provider options that are most suited for the care they need and the budget they can afford.
- As it stands now, referral agencies face very little regulatory oversight, yet operate within an industry that is highly regulated by the state to protect consumers and ensure quality care.
- This legislation would require that a referral agency only charge a fee if the referred resident moves into a facility up to 12 months after the "lead"/referral was provided to the facility. Currently, referral agencies often have 2+ years after a contract has been terminated to recoup referral fees (often known as "life of lead"). While WALA believes a referral agency should only be allowed to charge an assisted living facility for a referral while a contract is in place, other states where similar legislation has passed have stipulated 12-months (1-year) limit.

Chairwoman and Members of the Senate Committee on Health,

Thank you for the opportunity to testify today on Senate Bill 262 which I support.

My name is Geri Krupp-Gordon, and I am the Chief Operating Officer at Capri Communities. I am a registered nurse and an attorney. Capri Communities is the largest senior housing company in Wisconsin and operates and manages 43 communities in Wisconsin. Capri Communities serves 3,400 elderly residents and employs over 1,200 employees. I have worked in the senior housing and assisted living industry for over 30 years in a wide variety of operational and legal roles.

Senate Bill 262 would provide greater consumer protections and disclosure requirements on assisted living facility referral agencies. The referral agencies market themselves as experts in the industry offering unbiased and no cost referral services for families in search of assisted living services. In other words, they market themselves as a free service. The consumer is led to believe that the referral agencies offer an unbiased assessment of the best options out of the full set of facilities available in a particular market. That is not true.

Instead, referral agencies are incentivized to refer to those providers that pay the referral agency a commission. These commissions are typically 85% to 100% of the residents first month rent and care which, depending on the size of the apartment and type of care needed, can vary based upon resident needs and services. For example, the referral fees can range anywhere from \$4,800 - \$7,200 per resident but can be higher if a resident requires memory care services; upwards of \$9,000 - \$12,000. Intuitively, referral agencies are going to refer to the providers that will pay the agency the most money as opposed to what is the best option for an individual and their family. This creates an incentive to put vulnerable elderly individuals into the most expensive assisted living facility to get the highest referral fee.

Senate Bill 262 would offer greater transparency so that individuals and families understand there is a contract between referral agencies and the assisted living providers to which they are being referred and that there are other providers who may also be able to meet that individual's needs but do not contract with the referral agency. Senate Bill 262 would also provide transparency to the consumer on the amount of referral fees the facilities pay. This would allow families and individuals to have a better understanding of the extent to which the referral agency is influenced by the amount paid by the facility.

As a provider, we have also seen a growing trend where the referral agencies will list a facility on their website, even though the facility does not have a contract with that referral agency. The presence of a facility on the website inherently assumes a relationship when one does not exist. This is misleading to the consumer. Senate Bill 262 would require the referral agencies to disclose the fact that the referral agency lists on its website only those assisted living facilities with which the referral agency has a contractual relationship and would not allow the referral agency to list other providers. This would give full transparency to the consumer.

Thank you for the opportunity to speak. My name is Jessie Marceau, and I'm the proud owner of a small senior care advisory service serving Green Bay and the greater Northeast Wisconsin region.

On paper, limiting a referral agreement to one year may seem reasonable. But in reality, that kind of restriction **hurts the very people this bill is meant to protect—our seniors.**

Families don't make care decisions overnight—nor should they. Choosing the right senior living option takes time, trust, and thoughtful planning. Some families begin the process years in advance. Others delay because their loved one isn't emotionally ready. Our job is to walk beside them throughout that journey—until the timing, care needs, and setting are right.

If SB 262 limits referrals to just one year, we strip away that time. It pushes families to make decisions under pressure—and when that happens, seniors often end up in facilities that weren't their choice or fit, simply because they didn't have time to sit down with an expert who could help them plan.

Believe me—I **don't want to meet families in the emergency room.** I want to meet them at their kitchen table, over coffee, when everyone—\*\*especially the senior—\*\*has a voice in the conversation.

The foundation of CarePatrol was built on that principle. Chuck Bongiovanni, who founded our franchise, was a home health social worker. One day, he visited a memory care facility with a patient and realized he was the only one surprised by how poorly matched the setting was. The daughter chose it simply because she drove by it every day on her way to work. That's common—and it's avoidable.

Chuck combined the heart of social work with the guidance model of a realtor. And that's what CarePatrol became: a trusted advisor helping families find safe, appropriate care. Frankly, I think about how different this conversation would be if we were talking about realtors. I recently bought a house—and we worked with our realtor for **five years** before finding the right one. If I knew that support would be cut off after one year, I probably would've made a rushed and regrettable decision.

**This model was built on dignity, choice, and trust—not ticking clocks and forced timelines.**

And so, I respectfully ask: **don't take away a senior's chance to plan.**

Thank you.

My name is Tracy Doeppers, and I am the owner of CarePatrol, providing a senior care advisory service here in the Dane County area. I've lived in Dane County my entire life, and I've been helping seniors and their families navigate care transitions here in my community since 2019.

At the core of what we do is helping to guide seniors and their families through the process of finding a safe and appropriate care setting in the form of in-home caregivers, IL, AL or MC.

The families we work with don't have a background in the assisted living industry. And people have no idea how to navigate the process before they're thrown into the deep end of that proverbial pool.

Finding the right community is daunting in the best of times. We work with families who are overwhelmed, who are experiencing one of the worst periods in their life and have no idea about where to even start. So that "pool" they find themselves in is more like the ocean, in the middle of the night, with a hurricane raging around them.

We help families through that storm by providing trusted information on the assisted living industry, what the move-in process will look like for them, and about the communities that could be a good fit for their loved one.

Education:

What are various care settings? AL vs. SNF

What are differences between AL licenses in Wisconsin?

How does HCPOA affect which communities are viable options?

What is state survey history for each community, and if they have violations, what do they mean?

How is AL paid for in WI? What are the pay requirements at different communities?

What things should you be asking about during your tours?

But supporting families through care transitions is not just about helping them find a community to call home. These transitions are rarely simple, and we often provide families with recommendations for a myriad of other trusted resources that specialize in helping seniors with all aspects of their move:

Downsizers/movers, non-medical transport providers, real estate agents, elder law attorneys, VA resources, home modification providers, life settlement options, various support groups in their community, adult day programs, and on and on.....

And oftentimes families don't even know these valuable resources exist.

We are also a resource and partner for the case managers and social workers helping seniors in our local hospitals, rehabs, doctors offices, senior centers, etc.

Having the difficult conversation with seniors and their families when someone is no longer safe to remain in their home, is just one of 1001 things these professionals do in course of serving seniors. And while they can explain that a move to an assisted living community is needed, they simply do not have the time to research communities and provide the safest and most appropriate options to families.

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## CarePatrol of Dane County

### Sampling of Google reviews posted over the years by clients and families

★★★★★ 14 weeks ago

My mother needed care on short notice. We contacted CarePatrol and Tracy was fantastic. She helped us quickly navigate the available options. Her guidance took a tremendous amount of stress off our family. We are extremely grateful for her help and would highly recommend her services.

★★★★★ 30 weeks ago

This has been my very first time dealing with a stroke patient, my Mother. The possible choice of care and the navigating through it all was overwhelming! Some how we got connected to Wendy at Care Patrol and she just helped immensely! I have even passed her contact info on to a dear friend that also found her to be very helpful assisting with help for his Mother. GOD BLESS you Wendy!

★★★★★ 44 weeks ago

Wendy at CarePatrol was our lifeline in a time of great distress. She is kind, patient and was able to offer us multiple options to meet our family's needs. She truly cared that we find the right help at the right place.

★★★★★ Mar 27, 2024

Wendy was not only a huge help, she helped me avert a mistake! I needed to find someplace quickly, in an area I was not familiar with, that could provide care for a complex set of needs for my brother. She also knew something I did not fully understand - I thought an RCAC would be best. Wendy explained the difference between an RCAC and a CBRF. A CBRF was more appropriate to meet my brother's long-term needs. Had I done this "on my own", my brother would not be as well positioned for his future needs, and I would likely have had financial issues finding him placement in a CBRF in a few years. Thank you, Wendy!

★★★★★ Oct 26, 2022

Tracy helped us (during the most challenging times...the constraints/restrictions during Covid) with finding an appropriate and safe home for my chronically ill step mother. Her patience, experience, quick responses, and empathy is undescribed. Unlike many other companies, where they don't personally know the area or the facilities, Tracy visits and communicates with these communities on a regular basis. I honestly don't know what we would have done without her.

★★★★★ Oct 25, 2022

Tracey has been a wonderful resource for us as we have been trying to decide if moving our mom is the best choice for her. She has been great at staying in touch with options all the while allowing us the time and space to process them as we needed to. She has great insight into the community and we could tell she has authentic relationships with the facilities that we visited. We ultimately decided that moving mom was not in her best interest - Tracey was so kind and supportive of our decision. I truly feel that her top priority was finding the right place for mom - even if that meant not moving her at all. Thank you Tracey.

★★★★★ Sep 8, 2021

Tracy did a great job of helping us navigate a very difficult and emotional time. She listened carefully, with compassion which led us to the right fit for our mom. Without Tracy's knowledge and help, I can't imagine how we would have done this on our own. She has continued to support us after the move, and helped us, her family, make the transition as well.

★★★★★ May 15, 2021

Tracy Doeppers is a Saint on Earth! She contacted me when I was at a crossroad. I was unaware of all the additional options my Mother had in finding a great Assisted Living Home. Tracy provided me with options and resources I was not even aware of. Our family was able to find the best home for my Mother with her special care that was needed. I am deeply grateful for CarePatrol and especially Tracy Doeppers for all their compassion, expertise, and respect they provided for my Mother. Thank you from the bottom of our hearts! Kelly Gilboy



**Recent Client Reviews – CarePatrol Fox Cities – 6/2/2025**  
Google reviews at <https://g.co/kgs/dfbXsfP>

**Kim Rose**

2 weeks ago **NEW**

Regina was our LIFE SAVER!!! We were in a bind a day after a hospital discharge and Regina was the first one that called us back to help with long term placement.. She was amazing. She made calls to long care facilities...she kept us updated on all options. She even met us back at the hospital when our dad went back to ER and talked to our dad on long term care options. She showed him pictures of the facility. She spoke very clearly to our hard -of-hearing Dad. Regina scheduled a tour of the facility with us and Within 4 days after Regina first talked with us, we were moving our Dad into a long care asst living facility. Regina made sure all our dads care needs were met with the long care facility. Our family can't thank Regina and Care Patrol enough for the amazing work in a few short days. Regina continues to check in with us to see how the Dad and the family is adjusting. AMaZing!!!!

**Gina Holmes**

13 weeks ago

My elderly mom has stage 7 Alzheimers and was staying at home with my elderly dad as her caretaker. She fell and broke her hip. Ann from CarePatrol, came to the hospital and assessed our situation. My mom was not eligible to go to a rehab place because of her advanced dementia. Ann contacted many memory care places to come to the hospital to assess my mom. Most were full or couldn't deal with the dementia and broken hip. 2 places who came to assess her were willing to take her. We are very thankful for Ann to help us out like she did.

**Christopher Lundgren**

17 weeks ago

I've worked with CarePatrol of both the Fox Cities and Green Bay, initially to find a place for my parents and then to move my mother to a facility in Green Bay after my father passed. The teams from both offices were professional, proficient, knowledgeable, and did an excellent job with finding suitable facilities. They also understood some of the hesitation my mother had and were quite patient with her. I would highly recommend CarePatrol for your elder care placement needs.

**Shannon McHugh**

26 weeks ago

My first experience with CarePatrol was seven years ago with Michelle . She worked with me to find an appropriate placement for my mom. There was no pressure, only honest recommendations and suggestions. We found a wonderful place for my mom and I was so thankful for all that CarePatrol provided for us at that time. Seven years later, I contacted them again due to unforeseen circumstances with the facility that my mom was in. I was connected to Tabitha, who took the time to research facilities that would not only match my mom's growing needs, but would be financially feasible, but most importantly, a good fit for my mom. Tabitha was patient, empathetic, and was in constant contact with me throughout the process. Placing a loved one in a facility is a very emotionally charged time and navigating it can be overwhelming. I am so incredibly grateful to Tabitha and CarePatrol for guiding me through this time.

Testimony in Support of Senate Bill 262

Submitted to the Senate Committee on Health

By: Denise Barnes CSW

Director of Community Relations, Great Lakes Senior Living

Chairwoman and members of the Senate Committee on Health

Thank you for the opportunity to speak in strong support of Senate Bill 262, which would establish and bring much needed transparency to the business practices of assisted living referral agencies in Wisconsin.

My name is Denise Barnes, I am a *Certified Social Worker* and currently serve as *Director of Community Relations* for **Great Lakes Senior Living**, which owns and operates 5 Assisted Living communities serving up to 208 residents in Beloit, Milton, and Waterford. We employ 156 individuals.

All of the communities are **WALA DIAMOND ACCREDITED** since 2020 wherein we abide by quality standards more stringent than the state regulations. Our employees have honored us with ***Great Place to Work*** Awards for the past 4 years. With an occupancy of over 95%, we have strong business practices and consistently exceed regulatory standards.

I have worked in healthcare and senior services for many years. This includes as a Social Worker/Discharge Planner in a hospital, skilled nursing settings, and for the past 15 years, in senior housing and assisted living.

In my professional experiences, I have direct and ongoing interactions with a wide range of referral agencies, and I have seen firsthand the lack of consistency, transparency, and oversight in how they operate.

I have observed tactics to mislead consumers based on the existence of contracts that have lucrative “partnerships with communities.”

Referral agencies have financial incentives to prioritize certain communities over others, leading to a more limited range of options being presented to the consumers.

Recommendations for Assisted Living communities are based on those with contracts, eliminating discussion of other communities even if another would be a better fit for the elderly individual’s need or budget.

This can also lead to steering consumers toward more expensive options, so that the agency may receive a larger commission. This will at times keep them from contacting communities that the family were initially considering.

A common theme I hear from families is after talking with a referral agency is, *"Now why did they tell me you had no openings."* Families are often under psychological pressure when searching for care. They trust these agencies to guide them fairly--- not realizing that many operate with undisclosed financial incentives, and selectively promote only contracted communities, and often prioritize profits over appropriate placements.

Senate Bill 262 does not eliminate the use of referral agencies. It simply asks referral agencies to be honest and ethical about how they are compensated and what relationships they have.

It provides basic consumer protections and respects a family's right to know who's influencing their care decisions.

It helps to ensure that providers like us – who heavily invest in Quality and Compliance- are not disadvantaged by agencies steering referrals to the highest bidder. Reliance on third party referrals can compromise the quality of services elderly individuals receive.

I believe that the bill goes a long way to assure that families are able to identify the tangible benefits of use of a third-party referral agency.

It will allow them to not become a name in a database that initiates payment somewhere in the future simply because they clicked on a website (sometimes years prior) while searching for answers.

This bill will also ensure that the support that they are given in making decisions from a hospital or skilled nursing facility (SNF) follows a time- tested process, where the referral is processed by social workers, registered nurses, therapists and physicians.

Just because Medicare does not fund assisted living cannot mean consumers expect that a lesser competency or support in the referral process.

Poor referral management can lead to communication breakdowns, and delays in needed services.

The credentials to work within the third-party referral market is not mandated, and therefore not equal.

If a third -party referral platform provides inaccurate or misleading information, or if the referral agency engages in practices that are unethical, it can damage the resident/facility relationship.

Residents referred through these agencies are at times hearing information through a third party and may not be fully informed about the community or its services, leading to misunderstandings and a potentially negative experience.

My final concern is consumers may not have control over how their personal information is used and shared by referral agencies. They may not know who will receive their data, how it is used, or disclosed leading to concerns about data privacy and potential misuse.

I respectfully urge you to support Senate Bill 262. Our state's seniors and their families deserve transparency, fairness and accountability at every stage of their care journey.

Thank you for your time and attention, I am happy to answer any questions.



222 W. Washington Ave. Suite 600 | Madison, WI 53703  
1-866-448-3611 | Fax: 608-251-7612  
aarp.org/Wisconsin | wistate@aarp.org | twitter: @aarpwi

To: Senator Cabral-Guevara, Chair Senate Health Committee  
From: Martha Cranley, State Director AARP  
Date: June 4, 2025  
Re: AARP support for SB262

The number of older adults in Wisconsin is growing at an unprecedented rate, and the need for long-term care is going to increase significantly in the coming years. On behalf of our 800,000 members in Wisconsin, AARP supports the goals of SB262.

As you know, there are more than 32,000 assisted living facilities in the United States that serve more than a million adults, including nearly 61,000 beds/units in Wisconsin. Assisted living is a costly form of long-term care. According to Genworth, the average annual cost for assisted living in 2024 was \$70,800, and Medicaid does not cover many of the expenses associated with assisted living, meaning that much of the cost is paid for out-of-pocket.

Deciding whether to enter assisted living is a consequential decision that can impact an older adult's financial and overall well-being for years, and older adults and their loved ones deserve honesty and transparency from companies that stand to profit from their decision.

Currently, agencies that refer older adults to assisted living communities in Wisconsin do not have to disclose any relationship it has with an assisted living community or any fees the community pays to the agency (fees that tend to be passed on to residents). Referral agencies also do not have to disclose if their website only lists assisted communities with whom they have contractual relationships. SB262 would address these, and other referral agency practices that harm consumers.

SB262 is similar to legislation that has already passed in other states, including WA, CO, AZ, and MD. AARP believes that all products and services should:

- **Ensure choice**—consumers should have access to a variety of meaningful options.
- **Prioritize safety**—consumers have a right to goods and services that are safe, appropriately tested, and labeled with warnings of possible risks.
- **Promote fair play and practice**—business practices, consumer contracts, and marketing materials should be straightforward. They should not be unfair, deceptive, abusive, or discriminatory.
- **Foster transparency**—consumers should receive understandable and accurate information about goods and services, pricing, business practices, companies, service providers, risks, and their rights. This information should be in plain, easily understood language.



**SB262 would help accomplish these goals for consumers and their loved ones who are trying to make the best possible decision about whether and where to receive assisted living services. For this reason, AARP Wisconsin supports the adoption of SB262.**



## CarePatrol of Rock County/Metro Rockford

### Our Commitment to You

The purpose of this document is to:

- 1.) **Define services** that CarePatrol of Rock County/ Metro Rockford will provide for the client;
- 2.) **Establish the expectations** that the client, family, friends, and assignees, (the decision makers) have and;
- 3.) **HIPAA authorization** for us to share your confidential information.

**CarePatrol is a FREE service to our clients.** We are compensated by the community after a safe and appropriate placement has occurred within the community that has been selected by our Client.

#### CarePatrol services will provide the following:

- **Care Discovery:** Initial discussions to determine the social, spiritual and medical needs and the financial capability of the client. This typically includes meeting the person(s) of interest to further determine needs, wants and desires.
- **Communication:** In the interest of offering the best options of support for you and/or your loved one, we ask that all communication to and from any communities of interest be directed to and originate from CarePatrol Rock County/Metro Rockford. This will allow for completion of our service commitment to you. Our goal is to find the best fit for the person(s) needing care. By allowing CarePatrol to handle all communications with potential communities, we can provide our service in a smooth, seamless, and expeditious manner.
- **Safe and Appropriate Placement Options:** CarePatrol will provide information regarding several safe, licensed, and inspected communities based on the Care Discovery review and discussions.
- **Tours:** CarePatrol will arrange tours of the agreed upon communities. Due to the nature of our relationship with vetted communities, it is our role to arrange for tours of the most appropriate options.
- **Paperwork:** Continuity of paperwork and advisement of next steps will be a part of the Senior Care Advisor role to ensure as smooth of a transition into community life as possible.
- **Resource management and recommendations:** As needed and/or requested, CarePatrol will recommend additional service providers such as, but not limited to, VA Aid and Attendance, movers, financial planners, estate planners, elder care lawyers, and Realtors.
- **Move-in and Follow-up:** CarePatrol will remain involved to ensure that the placement into the community is completed in an efficient manner. CarePatrol will follow up with the client and/or the appropriate decision maker(s) to confirm that expectations have been met.

**OUR PROMISE:** CarePatrol Rock County/Metro Rockford is proud to be a part of your journey. Our promise is to provide the best possible options of living and care with the understanding that you have a choice to make a decision that is wisdom-based and guided by the information we share. We understand it is our client's decision to select a community we have recommended and appreciate that these decisions are important.



# NPRA

NATIONAL PLACEMENT & REFERRAL ALLIANCE

## CANCELLATION OF REFERRAL SERVICES

I have a choice in the referral or placement service I choose to work with. Unfortunately, I understand that sometimes people have no knowledge when their information is being used for commercial use and given to many senior housing communities to establish a "First Position" for referral compensation. I also have the choice to work with a service that performs a better quality of search.

THEREFORE, I hereby immediately cancel, revoke and/or terminate any actual or implied agreement between me and hereafter referred to as "Terminated Agency."

Terminated Agency\*

A Place for Mom

My Full Name (Important: Please use the exact name that you used on the agency website that you want to cancel services from.)\*

Craig

First Name

Middle Name  
(optional)

Customer

Last Name

My Email Address (Important: Please use the exact email address that you used on the agency website that you want to cancel services from.)\*

customer@yahoo.com

After submitting this form, you will receive an email with the contents of this form.

My Phone\*

(608) 555-4444

Location\*

Janesville

City

Wisconsin

State

53546

ZIP Code



**NPRA**  
NATIONAL PLACEMENT & REFERRAL ALLIANCE

## CANCELLATION OF REFERRAL SERVICES

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Terminated Agency\*

A Place for Mom

My Full Name (Important: Please use the exact name that you used on the agency website that you want to cancel services from.)\*

Craig

First Name

Middle Name  
(optional)

Customer

Last Name

My Email Address (Important: Please use the exact email address that you used on the agency website that you want to cancel services from.)\*

customer@yahoo.com

After submitting this form, you will receive an email with the contents of this form.

My Phone\*

(608) 555-4444

Location\*

Janesville

City

Wisconsin

State

53546

ZIP Code

The Person I Am Searching Senior Care For\*

Dad Customer Name

I ATTEST\*

- I did not knowingly authorize Terminated Agency, its agents or assignees, to send my information to a third party.
- I was unaware when I visited the Terminated Agency website, or when I was directed to the Terminated Agency website by another website owned by Terminated Agency, but not limited to any website they are affiliated with or receive client information from.
- When I interacted with Terminated Agency's website, I didn't know the Terminated Agency would assert the right to use my information and disseminate my personal and/or contact information to third parties.

I HEREBY DEMAND THAT TERMINATED AGENCY TAKE THESE ACTIONS\*

- Delete my and/or my loved one(s) name(s) from the Terminated Agency's database.
- Notify all providers to which Terminated Agency provided my personal and/or contact information that the Terminated Agency did not know that I was authorizing the use of any of my personal information to anyone. I believed I was completing the form for informational purposes only.
- Notify all providers to which Terminated Agency provided my personal and/or contact information that I was unaware of my agreeing to use my information for a referral or transaction. I choose to work with another referral agency provider.

- Delete any reference to the association of any business or commercial connection in your database between myself, my loved one and Terminated Agency.

NEW AGENCY RELATIONSHIP

The Name of The Agency or Agent I Choose to Represent Me Is

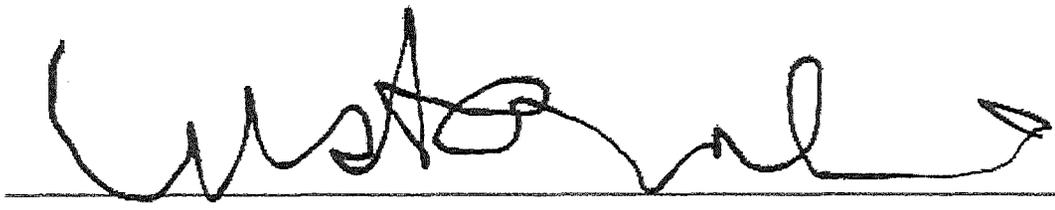
CarePatrol - Rock County / Metro Rockford

Email Address of The Agent or Agency

cgrubanowitch@carepatrol.com

After submitting this form, the email address listed above will receive a message with the contents of this form.

Signature\*

A large rectangular box containing a handwritten signature in black ink. The signature is cursive and appears to read "C. Grubanowitch".

[clear](#)

Use your mouse or finger to draw your signature above

Date\*

06/03/2025 

# Testimonials from Verified Customers

## CAREPATROL of Rock County / Metro Rockford

**RATED 10 OUT OF 10 BY C.P.**

May 29, 2025

**What did you like about your experience with CarePatrol?**

Personal care. Respect for patient and family needs. Offered appropriate choices for the patient for family to tour. Provided information to facilitate the family decision making. Carrie was awesome!

**RATED 10 OUT OF 10 BY D.S.**

May 28, 2025

**What did you like about your experience with CarePatrol?**

Carrie did an excellent job helping my mom find an assisted living facility. She gave us lots of options & was very knowledgeable about the business.

**RATED 10 OUT OF 10 BY L.M.**

May 24, 2025

**What did you like about your experience with CarePatrol?**

Insight into assisted living facilities  
Save me time by not having to coordinate appointments  
Helpful hints on additional financial assistance

**RATED 10 OUT OF 10 BY E.C.**

March 10, 2025

**What did you like about your experience with CarePatrol?**

Knowledgeable, helpful and an advocate for my loved one.

**RATED 10 OUT OF 10 BY K.**

March 8, 2025

**What did you like about your experience with CarePatrol?**

Carrie was so thoughtful, caring and efficient. She quickly found a place that would work for my mother. She walked us through every step to help us, as this was new territories to us. Thank you, Carrie and Care Patrol.

**RATED 10 OUT OF 10 BY J.G.**

March 7, 2025

**What did you like about your experience with CarePatrol?**

My family had a 3-month journey with my step-father going back and forth from rehab to the hospital several times before we could move him into assisted living with skilled nursing. Carrie was with my mom and me every step of the way. Literally! We were in constant contact throughout that time and she was a frequent visitor at the rehab facility while he was there. She made a difficult adjustment so much easier with her ample knowledge of so many facilities and contacts in the area. She has a knack for explaining confusing topics in a way that assured my family that we were all in good hands. She came with us on our assisted living tour and even helped to move him in when that day finally arrived. Her therapy dog Coco is a delight as well.

**RATED 10 OUT OF 10 BY M.S.**

February 18, 2025

**What did you like about your experience with CarePatrol?**

My advisor Carrie was very knowledgeable and caring.

**RATED 10 OUT OF 10 BY M.B .**

January 20, 2025

**What did you like about your experience with CarePatrol?**

Carrie Grubanowitch was very helpful in finding my mother an assisted living residence. She suggested four places within my mother's budget and visited them with my sister who was in town. She was very kind to my mother also.

**RATED 10 OUT OF 10 BY D.M.**

December 5, 2024

**What did you like about your experience with CarePatrol?**

1:1 contact

**RATED 10 OUT OF 10 BY L.V.**

November 25, 2024

**What did you like about your experience with CarePatrol?**

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I have been working with Carrie Grubanowitch from Care Patrol to help families in need. Her level of dedication to families is remarkable. She always goes above and beyond in helping them. Whatever it takes to make sure they are taken care of and have the support to make good care decisions for their loved ones. She is a true angel.

Laura

**RATED 10 OUT OF 10 BY J.D.**

September 17, 2024

**What did you like about your experience with CarePatrol?**

Great communication. Follow up. And utmost care and concern for our mother.

**RATED 10 OUT OF 10 BY P.B.**

August 12, 2024

**What did you like about your experience with CarePatrol?**

Our senior advisor, Carrie Grubanowitch was wonderfully helpful in finding a place quickly that was a perfect fit for my mom's needs. She went above and beyond visiting my mother even while I was away. Very caring!

**RATED 10 OUT OF 10 BY G.H.**

August 8, 2024

**What did you like about your experience with CarePatrol?**

Carrie is simply amazing!! We found ourselves in need of an assisted living facility for My Dad. Literally within a couple hours Carrie had made arrangements made for us to meet with a facility that turned out to meet our needs perfectly.

I would urge anyone looking for help like this to give her a call.

She has an amazing network that made everything completely seamless!!

**RATED 10 OUT OF 10 BY J.C.**

August 7, 2024

**What did you like about your experience with CarePatrol?**

We were kept apprised of every visit to every facility. The communication was fantastic. In the end we found the right facility. Carrie was great to deal with through the entire process. I would highly recommend CarePatrol.

**RATED 10 OUT OF 10 BY C.G.**

July 16, 2024

**What did you like about your experience with CarePatrol?**

Carrie was wonderful to work with. We talked at 3:30 on a Wednesday and she visited my father that night at 6:30 to understand his situation and what needed to be done. Carrie kept me in the loop with everything she was doing to help my father. Carrie coordinated with the facility's Social Services Director and Finance Director to ensure my father's Medicare was extended. Carrie worked with other professionals to ensure there was a backup plan if the Medicare extension was not approved. She kept everyone updated and our family is so grateful for all her help and understanding the urgency to get things resolved quickly. She handled this very difficult and complex situation with professionalism and compassion. I would highly recommend Carrie to anyone who needs assistance with Assisted Living options. Aaron

**RATED 10 OUT OF 10 BY P.A.**

July 13, 2024

**What did you like about your experience with CarePatrol?**

Carrie was great! She was highly recommended by someone at UW. I called her and she met with my mom the same day. She was extremely supportive and was able to answer a lot of questions for us. She checked in regularly on mom's progress and visited her several times. She is very knowledgeable and caring.

**RATED 10 OUT OF 10 BY K.D.**

July 12, 2024

**What did you like about your experience with CarePatrol?**

This is a great service. Thank you Carrie!

**RATED 10 OUT OF 10 BY M.G.**

July 9, 2024

**What did you like about your experience with CarePatrol?**

Carrie was very informative and helpful with the needs I needed for my elderly Mother. We visited many assisted living facilities and it was very reassuring for my Mother. She responded in a timely manner to get the ball rolling.

**RATED 10 OUT OF 10 BY F.K.**

July 3, 2024

**What did you like about your experience with CarePatrol?**

Carrie voluntarily found out about our Alzheimer's support group and immediately provided information, guidance and support to our members.

She has been a valuable resource in helping advise and find places for patients that need help at home or need placement outside the home. My sister in the Chicago suburbs had recovered from a stroke and showing signs of dementia had lost her husband and was in a memory care facility she was not ready for.

Carrie connected me with the care patrol agency in her area and the agency was instrumental in getting my sister in a better placement for her. Carrie has been willing to provide outreach information through local churches and our community which is desperately needed in all communities involving this terrible disease. Floyd

**RATED 10 OUT OF 10 BY B.K.**

July 2, 2024

**What did you like about your experience with CarePatrol?**

Carrie has helped me with trying to place a friend in a quality facility. She is not only professional but so very kind. Carrie understands what Dementia is not only for the person involved but to the care givers. She will help above and beyond in whatever capacity. She helped me I know she can help you too.

**RATED 10 OUT OF 10 BY K.F.R.**

July 2, 2024

**What did you like about your experience with CarePatrol?**

Our representative (Carrie) was awesome. We met with her and she patiently educated us and asked the questions that we didn't know that we needed to ask. It was great having an advocate working on our behalf so that we could find the right solution for our dad's needs. She thought of things that we would have never thought of, like doing our tours of facilities at lunchtime so we could see the quality of the food and the ratio of male to female residents at lunch. Once we made the decision on where to place my dad, she was even thorough about going to see him for several weeks after the initial placement to make sure that he was adjusting well to his new home. I highly recommend Carrie and Care Patrol if you are looking to place a loved one in a senior care facility.

**RATED 10 OUT OF 10 BY V.M.**

July 2, 2024

**What did you like about your experience with CarePatrol?**

Because someone handed me the flyer about Care Patrol a few days prior to my husband's release from the hospital, I was able to get the help I needed to place my him from the hospital to the right Memory Care Community because of Carrie from CarePatrol.

The hospital was no help in guiding me or having the knowledge of care facilities beyond the hospital care. They hand an emotional family member/advocate a paper with 5 counties and 20-30 places in the area and say you pick. This placement is so crucial for our loved ones and we all need that guidance that Care Patrol gave us.

Carrie made calls on a late Friday after our first phone call and we had a tour at Azura in Beloit the following Morning, she then called the hospital case worker and stopped any further placement as we were looking into Azura because of Care Patrol.

I have given out your flyer to many health care providers, friends and family.

I am forever grateful for Carrie's kindness and prompt help in placing my husband!

Everyone I have spoken to has never heard of your company/service and what you do is amazing! I'll keep telling people of our life changing experience and the help and guidance Carrie at Care Patrol provided for us.

Thank you, Vicki

## GOOGLE BUSINESS REVIEWS FOR CAREPATROL ROCK COUNTY / METRO ROCKFORD

Sandy Dingus



Carrie was very prompt and a most excellent advisor when my husband and I were looking for assisted living for his mother. She offered the kind of customer service we haven't seen in a long time. She was extremely knowledgeable and a wonderful advocate during the contract process, making sure we understood everything and nothing was missed. She has excellent follow-up and checks in with my Mother-in-law and us to make sure she is being well taken care of. You'll be in excellency hands with her!

**Response from the owner** a month ago

Thanks Sandy for the kind words and love visiting your mother-in-law with Coco my therapy dog. She loves seeing Coco which brightens our day.



Betsy Petrie



It is very helpful to have someone knowledgeable to talk to when making decisions about healthcare for your elderly parents as there are so many variables to sort through. Carrie and CarePatrol are a wealth of information and can assist you with decision-making. I recommend this resource.

**Response from the owner** a month ago

Thanks Betsy - I was happy to help and talk through the various senior care options for your loved one. Always a phone call away 608-896-0620.



Smiles with Sunbeams



My family had a 3-month journey with my step-father going back and forth from rehab to the hospital several times before we could move him into assisted living with skilled nursing. Carrie was with my mom and me every step of the way. Literally! We were in constant contact throughout that time and she was a frequent visitor at the rehab facility while he was there. She made a difficult adjustment so much easier with her ample knowledge of so many facilities and contacts in the area. She has a knack for explaining confusing topics in a way that assured my family that we were all in good hands. She came with us on our assisted living tour and even helped to move him in when that day finally arrived. Her therapy dog Coco is a delight as well.

**Response from the owner** a month ago

It was a pleasure working with you and your family. It was a long road but we finally got there. Thank you for the kind words - very much appreciated.



Kelly Hart



Carrie was fantastic to work with and I highly recommend her. She was available day and night to answer questions and she was always quick to respond. She educated our family on the various facilities that would work best for our loved one and then scheduled the tours. And, even after the placement, she followed-up for the next 4 weeks to make sure that it was the right fit. Because of Carrie's expertise, we were able to make the decision in days, not weeks, on which facility was the right one and we don't regret our decision at all. It was a very positive experience and I highly recommend working with Carrie.

**Response from the owner**

I enjoyed working with your family on finding the right place for your Dad. It is great seeing him thrive in his new home. He is engaged in all the musical activities and I'm glad he enjoys the food. Love visiting your Dad so he can have some snuggle time with Coco and enjoy a snack together. Carrie



Marcey Golden



Carrie was very informative and very knowledgeable for the needs I was seeking for my elderly Mother. She set up variable facilities for us to visit, and made this process more comfortable and reassuring that we are making the right choice for my Mother's welfare.



Patty's Plants



Our senior advisor, Carrie Grubanowitch was wonderfully helpful in finding a place quickly that was a perfect fit for my Mom's needs. She went above and beyond visiting my Mother even while I was away. Very caring! I would highly recommend her with your loved ones needs.

**Response from the owner**

It was my pleasure helping your family find a memory care community for your mom before you needed to leave for a family trip. I enjoyed visiting your Mom with my therapy dog Coco and sending you pictures of her and Coco enjoying a snuggle. Happy to help – Carrie

**d**

drag racer

★★★★★

Carrie is simply amazing. You have questions? She has, or will get the answers very quickly. She has an amazing network of people that want to help. We simply couldn't be any more happy with ALL of the help she provided. Give her a call. I'm very sure you will have the same opinion.

**Response from the owner**

Thanks for the great review. I was happy to help find a wonderful place for your Dad. I'm so grateful that I was able to work with you both. I'm only a phone call away – Carrie

---

**H**

Holly Muth

★★★★★

Carrie at CarePatrol did a wonderful job for my client. She responded immediately to my initial call and was available within 24 hours. She was knowledgeable, resourceful and knew all the right questions to determine the best plan for my client. Very grateful to be partnered with her! Holly Muth

**E**

Edward Coen

★★★★★

Knowledgeable, caring and an advocate for my loved one.

**Response from the owner**

Thanks Ed - I appreciate your trust in me to help you and your family with this decision to help your loved one move to a safe memory care community. She is such a joy to visit, and she loves Coco my therapy dog.