



Commonwealth of Pennsylvania
Insurance Department
Office of Corporate and Financial Regulation

Continuing Care Retirement Community Resident's Agreement Checklist						
Statute/ Regulation	Brief Description (see applicable statute or regulation for complete requirements)	Yes	No*	N/A*	Page #	Para. or Sec.
40 P.S. § 3214(a)(1)	agreement for continuing care; value of all property transferred; joint and several liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(2)	all services specified	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(3)	health and financial conditions which would result in relinquishment of space in facility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(4)	required health and financial conditions for residency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(5)	financial difficulties under which resident is permitted to remain in facility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(6)	consequences of marriage of resident	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(7)	30 days written notice of cancellation of agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(8)	refund provisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(9)	cancellation terms due to death	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(10)	30 days notice of changes in fees or services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(a)(11)	no increase to charges for care paid in one lump sum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(b)	7 day right to rescind without penalty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(c)	death or incapacity of resident prior to occupancy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(d)	definition of just cause	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3214(e)	no agreement can waive Act 82	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
40 P.S. § 3215	resident's right of self-organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.8(b)	agreement shall be signed by provider and resident(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.8(c)	separate page attachment of purchased services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.8(d)	provision whereby resident is not liable to a health care provider for services rendered under agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(a)	drafting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(b)	readability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(c)	index	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(d)	pre-existing condition defined	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(e)	rescission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
31 Pa. Code § 151.9(f)	notice of right to rescind as separate page attachment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
* provide explanation on separate sheet						