

# Refer-a-Customer Program

## A. Eligibility

Effective for all new referrals received between January 1<sup>st</sup>, 2021 and June 30<sup>th</sup>, 2021.

The Refer-A-Customer Program is designed to reward employees for generating qualified leads that result in new full service or management rehabilitation contracts for HealthPRO Heritage.

## B. Program Guidelines

### Qualified Facility

A qualified skilled nursing facility (SNF), continuing care retirement community (CCRC), or Hospital that needs to contract for therapy services. Locations in current operating markets are preferred.

### Qualified Leads

To qualify as a lead, the decision-maker must be willing to meet with HealthPRO Heritage Healthcare Business Development to discuss services and be legitimately interested. Referrals must be qualified through some type of communication with the prospective client, not merely a suggestion based on opinion. The lead must include information that is not otherwise readily available or already known by the sales team to include contact information.

### Therapy Services Agreement

Management and full service (PT, OT, & SLP) therapy services agreements are eligible. Services must be started at the designated facility within 12 months of the initial meeting.

### Refer-A-Customer Bonus

Employee will be paid a Refer-A-Customer bonus in the amounts listed for each Referral once the contract or engagement has commenced, less applicable taxes and withholding:

Qualified SNF, CCRC, Hospital Full Service & Management Contracts:  
\$3,000.00/each site

Qualified Senior Living Full Service & Management Contracts:  
\$500.00/each site

Bonus will be paid in the paycheck at the end of the month within 60 days from the start of the contract.

### Shared Bonuses

Only one referral bonus will be paid for each “signed and started contract”. If more than one employee collaborates for the same referral, each will receive an equal amount of the bonus amount (less applicable taxes).

### Multiple Referrals

Any employee who refers two qualified referrals within a calendar year-and both referrals lead to “signed and started” contracts-will be paid an additional bonus of \$1,000.

## C. Procedure for Referring a SNF, CCRC or Hospital

**Step 1:** Employee identifies a prospective client.

**Step 2:** The employee completes the Refer-A-Customer Program Referral Form here: <https://app.smartsheet.com/b/form/6c2d2f7d6b194d2abfd5f225174bf5c7>

**Step 4:** Vice President of Business Development for that region will contact employee to discuss referral.

### **Business Development Representatives and Regions:**

Angie Larson – WA, OR, Northern CA, AZ, CO

Charity Hefley-Leigh – GA, NC, SC

David Mercugliano – FL, PA, DC, MD, VA, Upstate NY

John Schwaner – Senior Living (AL/IL) National Chains

Julie Bringas – IL, IN, MI, OH, WI

Katie Jeffrey – Southern CA

Linda Senecal – MA, ME, NH, RI

Mark Petty – AL, KY, LA, MO, MS, LA

Michele Saunders – CT, NJ, Downstate NY