

**HOUSE . . . . . No. 01097**

The Commonwealth of Massachusetts

PRESENTED BY:

*Kay Khan*

To the Honorable Senate and House of Representatives of the Commonwealth of Massachusetts in General Court assembled:

The undersigned legislators and/or citizens respectfully petition for the passage of the accompanying bill:

An Act relative to assist families care for elders.

PETITION OF:

NAME:	DISTRICT/ADDRESS:
<i>Kay Khan</i>	<i>11th Middlesex</i>
<i>Frank I. Smizik</i>	<i>15th Norfolk</i>
<i>Bruce J. Ayers</i>	<i>1st Norfolk</i>
<i>Jennifer E. Benson</i>	<i>37th Middlesex</i>
<i>Antonio F. D. Cabral</i>	<i>13th Bristol</i>
<i>Carolyn C. Dykema</i>	<i>8th Middlesex</i>
<i>James B. Eldridge</i>	<i>Middlesex and Worcester</i>
<i>John V. Fernandes</i>	<i>10th Worcester</i>
<i>Patricia D. Jehlen</i>	<i>Second Middlesex</i>
<i>Thomas P. Kennedy</i>	<i>Second Plymouth and Bristol</i>
<i>Peter V. Kocot</i>	<i>1st Hampshire</i>
<i>Elizabeth A. Malia</i>	<i>11th Suffolk</i>
<i>Mark C. Montigny</i>	<i>Second Bristol and Plymouth</i>
<i>Alice Hanlon Peisch</i>	<i>14th Norfolk</i>
<i>Denise Provost</i>	<i>27th Middlesex</i>
<i>Kathi-Anne Reinstein</i>	<i>16th Suffolk</i>
<i>Carl M. Sciortino, Jr.</i>	<i>34th Middlesex</i>

*Stephen Stat Smith*

*28th Middlesex*

*Joyce A. Spiliotis*

*12th Essex*

*David B. Sullivan*

*6th Bristol*

# HOUSE . . . . . No. 01097

By Ms. Khan of Newton, a petition (accompanied by bill, House, No. 1097) of Kay Khan and others relative to personal care or managerial services contracts for families caring for elderly relatives. Elder Affairs.

[SIMILAR MATTER FILED IN PREVIOUS SESSION  
SEE  
□ HOUSE  
□ , NO. 536 OF 2009-2010.]

## The Commonwealth of Massachusetts

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**In the Year Two Thousand Eleven**  
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An Act relative to assist families care for elders.

*Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same, as follows:*

- 1 Section 28 of chapter 118E of the Massachusetts General Laws shall be amended by  
2 adding at the end of said section the following:
- 3 Payment for services pursuant to a contract between family members to provide personal care or  
4 managerial services shall be considered a legally and reasonably enforceable fair market value  
5 transaction if the contract meets the following criteria:
- 6 (1) The agreement indicates the type, frequency and duration of the services being provided to  
7 the applicant or member and the amount of consideration being paid to the caregiver;

8 (2) The personal care services must enable the applicant or member to avoid or delay placement  
9 in a nursing facility or facilitate the return of an applicant or member from a nursing home to the  
10 community, as determined by a licensed medical professional or a licensed social worker;

11 (3) Payment for services is commensurate with a reasonable wage scale, based on the fair  
12 market value of the actual job performed and the qualifications of the caregiver;

13 (4) A lump sum payment by the applicant or member for services to be provided in the future,  
14 which is calculated based upon the applicant's or member's life expectancy, shall be considered  
15 an ascertainable fair market value transaction, provided that the contract requires the return of  
16 any prepaid monies to the applicant or member or his estate if the caregiver becomes unable to  
17 fulfill his/her duties under the contract or if the applicant or member dies before his/her  
18 calculated life expectancy.

19 The department shall promulgate regulations governing the implementation of this section.

20 "Applicant" or "member" shall include the legal representative of the applicant or member.

21 "Managerial services" shall include the acquisition, coordination and monitoring of medical,  
22 financial, accounting, home maintenance and legal services to benefit the applicant or member.