SURREY PLACE

2 Surrey Place,
Toronto ON M5S 2C2
416-925-5141
416-925-3402

OAP Paid Services Payment and Attendance Policy

Surrey Place helps people of all ages with developmental disabilities, autism and special needs in the Toronto region and Northwestern Ontario. We offer a comprehensive range of groups and one-on-one programs and services to respond to clients' needs.

The purpose of this document is to outline the terms and conditions of the services we provide so that all parties (e.g. staff, clients, substitute decision-makers (if the client is incapable), or designated representative) are aware of, and agree to, such terms and conditions. We respectfully require that clients (or if applicable, their substitute decision-makers) read and indicate agreement to the terms and conditions by (as applicable): (i) indicating such agreement by selecting 'I agree' when presented with an online link to these terms and conditions, or (ii) making your first payment of an invoice sent by Surrey Place (permitting these terms and conditions are attached thereto). If you have any questions, please contact your Intake Service Coordinator, or email us at client.accounts@surreyplace.ca

Cancellations and Make-Ups

1.1 Cancellations by Surrey Place:
If a cancellation is made by Surrey Place staff, the session will be rescheduled at the earliest available opportunity. If Surrey Place is unable to rebook the session, for any reason, before the end of the service block a refund will be issued to the client. See section 2.1 for terms related to cancellation caused by Force Majeure.

1.2 Client Cancellations:

1.2.1 Group Programing:
Due to the structure of group programming, there are no refunds, credits, or make-ups available for missed group sessions. If a client cannot attend a scheduled group session, clinical instructors will work with the client/caregiver to provide them with supplemental materials and resources to reference and review at home. Clients/caregivers should notify their clinician of their absence.

1.2.2 One-to-One Services: FBI, FDaba, SLP, OT, Assessments, and Mental Health
As it relates to any one-on-one services (e.g. FBI, FDaba, SLP, OT, Assessments, and Mental Health), Surrey Place requires (at minimum) 24 hours' notice for a cancellation. If a session is missed or cancelled less than 24 hours from the appointment time, Surrey Place will make a reasonable effort to reschedule a makeup session within a week from the initial appointment, if there is existing and available capacity to reschedule. Given the clinical benefits and program structure, Surrey Place will not reschedule a missed or improperly cancelled appointment past one week. There are no refunds or credits for a missed or improperly cancelled session.

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1.2.3 Home and Community-Based ABA

Home and Community-Based Applied Behavior Analysis (ABA) services may be provided in a variety of settings, including the client's home, approved community locations, and school environments, where appropriate and clinically indicated. The Provider is not responsible for obtaining, securing, or guaranteeing consent from any school or educational institution. Schools operate as independent entities and may approve or deny access for ABA services at their sole discretion.

ABA services within a school setting are not guaranteed and may only occur upon receipt of the school's prior written consent. If such consent is not granted or is withdrawn, this Service Agreement shall remain in full force and effect, and services will transition to in-home or approved community-based settings, as clinically appropriate.

A school's refusal or failure to provide consent shall not constitute grounds for cancellation of services, suspension or reduction of fees, or amendment, termination, or modification of this Service Agreement.

Centre Closures

2.1 Closures Due to Weather or Unforeseen Circumstances:

In the event that Surrey Place is unable to provide services due to weather or any other unforeseen circumstance ("Force Majeure"), the closure will be communicated to clients or their substitute decision-makers via website announcements and email notifications, where possible. Surrey Place will reschedule sessions that were cancelled due to the Force Majeure. Sessions will be rescheduled at the earliest opportunity available. If sessions cancelled due to Force Majeure cannot be made up before the end of a service block (after both Surrey Place and you exhaust all best efforts to schedule make-up appointments), then a refund will be issued.

2.2 Planned Centre Closures & Statutory Holidays:

Service will not take place on planned centre closure days or on statutory holidays. Any planned closures falling on planned centre closure days or on statutory holidays days are not charged and have not been included in the price of the service.

Invoice Payments

3.1 Deposit Invoice:

3.1.1 Deposits:

To ensure a client's spot, a **deposit of $1,000** is required by Surrey Place. Deposits must be paid within 48 hours of receiving an invoice. Services will not be provided until the Deposit, and first installment payment is made. If a Deposit is not provided by the required deadline, a client will not be entitled to a reserved spot in the certain programming, and Surrey Place may offer such a spot to another client.

3.2 Installment Invoices:

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3.2.1 Installment Invoices ABA Group Services

Service packages that exceed $1,000 can be paid through multiple installments.

For service packages less than $5,000, the remaining balance will be paid in two (2) installment invoices (delivered after the $1,000 Deposit). Each invoice will account for 50% of the remaining balance.

For service packages greater than $5,000 and less than $10,000, the remaining balance will be paid in three (3) installment invoices (delivered after the $1,000 Deposit). Each invoice will account for 33% of the remaining balance.

For service packages greater than $10,000, the remaining balance will be paid in four (4) installment invoices (delivered after the $1,000 Deposit). Each invoice will account for 25% of the remaining balance.

Clients do have the option to pay 100% of a service package at the time of registration.

The client or substitute decision-maker will be provided with a payment plan with required payments and due dates. In unfortunate circumstances where payment is not received by the due date, services may be suspended if a timely resolution cannot be identified.

Payment Terms:

Payment	Amount Owing	Payment Terms
Deposit	$1,000	Within 48 hours after registration
1st Installment	Under $5,000 - 50% of remaining balance Over $5,000 – 33% of remaining balance Over $10,000 – 25% of remaining balance	Two (2) weeks before start of service
2nd Installment	Over $10,000 – 25% of remaining balance	Four (4) weeks before end of service
2nd Installment	Under $5,000 - 50% of remaining balance Over $5,000 – 33% of remaining balance	Two (2) weeks before end of service
3rd Installment	Over $5,000 – 33% of remaining balance	Last day of service
3rd Installment	Over $10,000 - 25% of remaining balance	Two (2) weeks before end of service
4th Installment	Over $10,000 – 25% of remaining balance	Last day of service

For Summer camps <u>ONLY</u>

Payment	Amount Owing	Payment Terms
Deposit	$1,000	Within 48 hours after registration

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1st Installment	50% of remaining balance	Two (2) weeks before start of service
2nd Installment	50% of remaining balance	Last day of service

3.3 Preferred Method of Payment & Cheques:
Credit cards and direct bill payments (or vendor payments) from your bank's online bill payment screen are the preferred method of payment. Other accepted forms of payment are e-transfers and cheques made payable to Surrey Place.

Credit Cards:
Credit card payments can be made online at the time of registration through Stripe, or upon receipt of an invoice using a dedicated payment link.

When the initial payment is made online all subsequent payment will be automatically charged to the credit card provided at the time of registration, unless otherwise indicated.

Online Bill/Vendor Payments:
Instructions for making bill/vendor payments from your personal banking account will be provided upon request. The **Clients' SPC ID number** must be used when setting up your payment account with the Banking Institution. Payment limits are defined by your Banking Institution, please reach out to your Bank if you have questions about your daily limits.

This option is currently only available for the following Institutions in Canada:

- Royal Bank Account (RBC)
- Bank of Montreal (BMO)
- Canadian Imperial Bank or Commerce (CIBC)
- Toronto-Dominion Bank (TD)
- Bank of Nova Scotia (Scotiabank)

Surrey Place does not currently have agreements with other banking institutions or credit unions. If your financial institution is not listed above, we recommend using the credit card option or paying via e-transfer.

E-Transfer Payments:
E-transfer instructions will be provided. Please include the client's SPC ID number in the description or comments to ensure the payment is correctly applied to the appropriate account.

Cheques:
Cheques may be accepted in certain circumstances. A $35 Non-Sufficient Funds (NSF) fee will be charged for any cheques returned to Surrey Place due to insufficient funds or other issues identified by the financial institution.

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3.4 Processing Refunds
Where required under these terms and conditions, refunds will be issued to the original method of payment, where feasible, within 30 days of cancellation. For clarity, Surrey Place is only obligated to provide a refund where expressly stated in these terms and conditions; otherwise, all payments are non-refundable.

Service Termination

4.1 Refund: A refund, less a non-refundable administrative fee, will be issued if a request to terminate services is received at least 30 days prior to the agreed-upon service start date. Surrey Place will retain a 10% administrative fee based on the deposit amount received.

4.2 No Refund/Credit Group Program: No refunds or credits will be issued by Surrey Place once service delivery has commenced.

30+ days' notice before start of service	Full refund, less 10% admin fee
Less than 30 days' notice before start of service	No Refund

4.3 Respite: Once a respite service session has been confirmed, the booking is considered **final**. No modifications, rescheduling, or changes to the date, time, or duration of the session will be permitted after confirmation. Clients are encouraged to carefully review all booking details prior to confirming the service.

4.4 Camp Refunds: For all summer camp programs, no refunds or credits will be issued by Surrey Place once camp services have commenced.

4.5 Courses and Program Changes: For all other courses and programs, clients are permitted one (1) change per booking. This may include rescheduling the session date or modifying the session time, subject to availability and provided the request is submitted within the notice period established by Surrey Place.

Any approved changes or credits applied to a client's account are valid only until the end of the calendar year in which the original booking was made. All adjustments, rescheduled sessions, or credits must be used by December 31 of that year. Unused credits or adjustments will expire automatically and cannot be carried forward, refunded, or transferred to the following year.
Only one change per booking is permitted; additional change requests beyond the first approved change will not be accommodated.

Binding Agreement, General Terms.

This is a binding legal agreement between Surrey Place and the client that confirms their agreement with its terms and conditions (it is acknowledged that substitute decision-makers may make such confirmation if applicable). You are free and encouraged to consult legal counsel before agreeing to these terms and conditions. This agreement will be governed and interpreted in accordance with, as applicable, the laws of the province of Ontario and the federal laws of Canada. The parties attorn to the exclusive jurisdiction of the courts of Ontario with respect to any

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matter that may arise between the parties under or relating to this agreement. If any provision of this agreement is held by a court of competent jurisdiction to be contrary to law, the remaining provisions of this agreement will remain in full force and effect. These terms and conditions can be modified by Surrey Place in its sole discretion; if such a modification occurs, Surrey Place will give you notice in writing, and the change shall take effect immediately after completion of any service block that you have paid for in full.