



Checklist for Consumers and Prospective Residents

When you are looking for an assisted living or residential care setting for yourself or a loved one, please consider the following checklist to help you make the best choice.

Service Planning

- Are the family and the resident involved in the service planning process? How often are residents' needs assessed? Who completes the assessment?
- Are there special programs for memory impaired residents and residents with dementia? Are there accommodations for memory-impaired residents to be outside and exercise?
- Are there special programs for residents with disabilities?
- How are emergency situations managed? What is the protocol for such events?
- What happens if the health care needs of a resident change? Under what conditions are residents asked to move if there is a change in health status?

Services and Activities

- Does staff assist residents in administration of medication? If so, what kind of staff?
- Does the residence generally use a particular pharmacy? If applicable, does that pharmacy participate in the individual's Medicare Part D prescription drug plan? Does the pharmacy provide a yearly review and consultation services?
- Are there professional nursing services on site? If not, does the staff assist residents and families in making arrangements through a home health agency?
- Are the services of a physical, occupational or speech therapist available or arranged?
- Does the residence provide bed linens and towels?
- Does the facility provide laundry service?
- Are there beauty shop services available on site?
- What recreational and spiritual activities are available? Obtain or review a copy of the activities calendar.
- Are the activity supplies available for resident use outside of scheduled programs?
- Is transportation provided for medical appointments and recreational purposes? Is there a fee?
- Are there resident and family councils? How often do they meet?
- What are the suggestion, complaint, or grievance procedures?
- Can hospice care be offered? If so, does the facility coordinate that care with the physician and family?



Staff

- Ask about the residence's staffing patterns and philosophy about staffing.
- What training and qualifications are required for staff? Are there on-going training programs provided for staff?
- Observe staff and resident interactions. Are they positive? Courteous?
- Does staff handle resident requests in a timely way?
- Can private duty companions be hired? What is the procedure for that type of service?
- Does the facility have a volunteer program? If yes, what types of activities do the volunteers perform?
- Does the administrator/director practice an "open door" policy?

Moving In

- What does the moving in process entail? What are the paperwork requirements and the timeframes involved?
- How is the initial assessment managed? Who completes the assessment?
- Is the residence affiliated with a hospital or nursing home should acute or long-term care be needed? If so, is there a priority admission process?
- If you need hospital or nursing home care, is your room held? What are the associated fees? Is there a discount for unused services (e.g. meals)?
- Does the residence subscribe to a set of resident rights and responsibilities? Are printed copies of resident rights and responsibilities available?

Costs and Fees

- What is included in the basic monthly cost? Ask for a written copy.
- Does the residence have a written schedule of fees for extra services? If so, request a copy.
- Under what circumstances might the fees change? How much notice is given if there is a fee increase?
- Is there a security deposit? What is the refund policy?
- Can service agreements and or contracts be amended or modified?

Dining and Food Services

- Does the residence accommodate special diets?
- Does a dietician or nutritionist review the menus? Request or review copies of the menus.
- How often do the menus rotate? Are residents and families involved in the menu planning?
- Are residents allowed to have guests for meals? Is there a separate guest dining room?
- What are the criteria for residents to eat meals in their rooms?



Living Space and Accommodations

- Are there adequate community areas for resident use?
- Are the resident rooms furnished or unfurnished?
- What is the policy about personal belongings?
- What is the policy for overnight guests? Are there guestrooms available? What are the guest fees?
- Is additional storage space available? Is there an extra fee?
- Does the residence meet the rules for people with disabilities?
- Can residents have automobiles? Is there assigned parking? Is there an extra fee?
- Are there patios and courtyards available for resident use? Is there an area for resident gardening?
- Does the residence provide security?
- Are pets allowed to reside in the residence? If so, are there additional fees and or deposits?
If not, are pets allowed to visit?

Licensure and Certification

- Is the residence licensed? Ask to review the last licensing or certification report.
- If the state requires the administrator to be licensed or certified, is it current?
- Does the staff actively participate in a professional association, such as a state long term care association affiliated with National Center For Assisted Living?

Safety

- Does the facility have a fire sprinkler system throughout the facility?
- Where are smoke detectors located?
- How often does the facility have fire drills?
- Does the facility have an emergency preparedness plan?
- How are emergency and evacuation plans reviewed with resident after admission to reinforce their memory?
- What systems are used to keep residents with dementia or Alzheimer's secure from successful exit strategies?

Location

- Is the location of the residence convenient to shopping, medical services, and entertainment areas?
- Can family members and visitors easily locate the residence for visiting?



Final Checklist Prior to Signing the Service Contract

This checklist is provided to the family and prospective resident as a final tool once an assisted living residence has been chosen. Use this as a reminder for issues that need to be addressed and fully understood.

Make sure you:

- Know what the basic service package includes
- Know all costs associated with your service package
- Know about additional services and their associated fees (e.g., medication management)
- Know the circumstances why fees might change and how much notice is given to families and residents
- Understand the services planning process
- Understand the service contract
- Know about the criteria and policies associated with discharge
- Understand resident rights and responsibilities
- Know the residence's grievance policy and procedure
- Understand how many staff are available and their qualifications
- Have the name and telephone number of the staff contact person