

Assisted Living/Residential Care Checklist

First Impression

- Do you like the facility's location and outward appearance?
- Is the facility convenient for frequent visits by family and friends?
- Is the facility near a shopping and entertainment complex?
- Can the resident access a medical complex easily?
- Is public transportation available/accessible?
- Are you welcomed with a warm greeting from the staff?
- Does the staff address residents by their names and interact with them during your tour?
- Do you notice the residents socializing with each other and do they appear content?
- Can you talk with residents about how they like living there and about the staff?
- Is the staff appropriately dressed, friendly and outgoing?
- Do the staff members treat each other in a professional manner?
- Are visits with the residents encouraged and welcome at any time?
- What percentage of the apartments has been rented and is occupied?
- Is there a waiting list? If so, how long do they estimate it will take to be admitted?

Living Area and Accommodations

- Is the floor plan well designed and easy to follow?
- Are doorways, hallways and rooms accommodating to wheelchairs and walkers?
- Are elevators available for those unable to use stairways and handrails to aid in walking?
- Are floors of a non-skid material and carpets conducive for safe walking?
- Does the residence have good lighting, sprinklers and clearly marked exits?
- Is the residence clean, free of odors and appropriately heated/cooled?
- What is the facility's means of security if a resident wanders?
- Are the common areas in general attractive, comfortable and clean?
- Is there an outside courtyard or patio for residents and visitors, can they garden?
- Does the residence provide ample security and is there an emergency evacuation plan?
- Are there different sizes and types of units available with optional floor plans?
- Are single units available and/or double occupancy units for sharing with another person?
- Does residence have furnished/unfurnished rooms? What is provided or what can they bring?
- May they decorate their own rooms? Is there adequate storage space?
- Is a 24-hour emergency response system accessible from the unit with own lockable door?
- Are bathrooms private with handicapped accommodations for wheelchairs and walkers?
- Do all units have a telephone and cable TV and how is billing handled?
- Does kitchen unit have refrigerator/sink/cooking element and can food be kept in their units?
- May residents smoke in their units or are there designated public areas?

Moving In, Contracts, and Finances

- What's involved with the moving in/out process? How is the initial needs assessment done?
- Does assessment process include the resident, family, facility staff, along with the physician?
- Is there a written plan for the care of each resident and is there an ongoing process for assessing a resident's need for services and how often are those needs evaluated?
- Is the facility affiliated with a hospital or with a nursing home?
- Will your room be held for you should you require a hospital/ nursing home stay and are there charges for your room while away?
- Is there a written statement available of the resident rights and responsibilities?
- Is a contractual agreement available that clearly discloses healthcare, accommodations, personal care and supportive services, all fees, and admission and discharge provisions?
- How much is the monthly fee? How often can it be increased and for what reasons? Is there a limit on the amount of increase per year? What is the history on monthly fee increases?
- What are the specific costs for various levels or categories of services?
- What additional services and staff are available if the resident's needs change?
- Is there a procedure to pay for additional services such as skilled nursing care and physical therapy when the services are needed on a temporary basis?
- When may a contract be terminated and what are the policies for refunds and transfers? Is there an appeals process for dissatisfied residents?
- What happens if funds are depleted and full payments can no longer be made?
- Is there any government, private or corporate programs available to help cover the costs?
- Find out what the payment schedule is and if residents own or rent their unit?
- Are residents required to purchase renters' insurance for personal property in their units?
- Do billing, payment and credit policies seem fair and reasonable? May resident handle his/her own finances with staff assistance if able? Must a family member/outside party be designated?

Health/Personal Care/Services

- Can the facility provide a list of available services and are residents and families involved in developing the service agreement? Who provides these services/what are their qualifications?
- Is staff available to provide 24-hour assistance with activities of daily living (ADLs) if needed? ADLs include dressing eating, mobility, hygiene, grooming (bathing, toileting, incontinence)?
- Does residence have programs for Alzheimer's, other dementias and other specialized areas?
- Is staff available to assist residents who experience memory, orientation, or judgment losses?
- How are medical emergencies handled? Does the residence have a clearly stated procedure for responding to medical emergencies? Is there an arrangement with a nearby hospital?
- Does staff supervise/assist a resident in taking medicine? May resident take own medications?
- Does the residence's pharmacy provide delivery, consultation and review of medicines?
- Does staff assist in making arrangements to have nursing and other medical care? Do a physician/nurse make regular checkups? Or to what extent is medical care available?
- Are physical, occupational, or speech therapy services available and is there a staff person to coordinate home care visits from a nurse, physical therapist, occupational therapist, etc?
- Are housekeeping, linen service and personal laundry included in the fees, or are they available at an additional charge? Are on-site laundry facilities available and convenient?
- Does the residence provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents and can it be arranged on short notice?
- Are pharmacy, barber/beautician and/or physical therapy services offered onsite?

Social and Recreational

- What kinds of group/individual recreational activities are offered and who schedules them?
- Is there an organized activities program with a posted daily schedule of events?
- Do volunteers and family members come into the residence to participate/conduct programs?
- Does the facility schedule trips or go to other events off premises?
- Do residents participate in activities outside of the residence in the neighboring community?
- Are the resident activity (social) areas appropriate and desirable to the prospective resident?
- Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening)?
- Are religious services held on the premises or arrangements made for nearby services?
- Are there fitness facilities, as well as regularly scheduled exercise classes?
- Does the residence create a sense of community by allowing residents to participate in certain activities or perform simple chores for the group as a whole?
- Are residents' pets allowed in the residence? Does facility have pets and who cares for them?

Staff

- What are the residence's practices and philosophy regarding staffing?
- What are the hiring procedures and requirements for eligibility? Are criminal background checks, references, and certifications required?
- Is there a staff-training program in place and what does it entail?
- Is staff courteous to residents and to each other? Are requests for assistance timely?
- Is the administrator, or appropriate staff person generally available to answer questions or discuss problems and would you be comfortable dealing with them on a daily basis?
- Does the facility have a volunteer program or is it affiliated with any student clinical programs?

Food

- Does the residence provide three nutritionally balanced meals a day, seven days a week, and how does the menu vary from meal to meal?
- What about special diets; does a qualified dietitian plan or approve menus? Are resident's weight routinely monitored?
- Are residents involved in menu planning and may they request special foods?
- Are common dining areas available and when can residents eat meals in their units?
- Does dining room environment encourage residents to relax, socialize, and enjoy their food?
- Are meals provided only at set times or is there some flexibility? Are snacks available?
- How many meals are included in the fee? If a resident becomes ill, is tray service available?
- Can residents have guests dine with them for an additional fee? Is there a private dining room for special events and occasions, if desired?

Licensure and Certification

- If the state requires the residence to be licensed and/or certified, does it have a current license/certification and is it displayed?
- If the state requires the administrator to be licensed/certified, does she/he have a current license/certification?
- Is the facility a member of a trade or professional association?
- What reputation does the facility have in the community? How long has it been in business? Is it in good financial health? Does the facility follow generally accepted accounting procedures?
- If the facility is sponsored by a nonprofit organization and managed under contract with a commercial firm, what are the conditions of that contract?
- Is there a resident council or organization through which residents/family have a means of voicing their views on the management of the community?