



## **ASSISTED LIVING & RESIDENTIAL CARE CHECKLIST**

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## A GUIDE FOR CONSUMERS AND FAMILIES

When exploring assisted living or residential care options for yourself or a loved one, use this checklist to help guide your decision.

### Service Planning

- How are residents and families involved in creating the service plan? How often are care needs reassessed, and who completes the evaluations?
- Does the community offer specialized programs for individuals with memory loss or dementia? Are safe outdoor spaces available for these residents?
- How are programs designed to support residents with physical disabilities?
- How are medical emergencies handled? What is the community's response protocol?
- If a resident's health needs change, what is the support available? Under what circumstances might a resident be asked to relocate?
- What level of care can be provided before a resident must move to another setting?
- What are the policies regarding advance directives and "Do Not Resuscitate" (DNR) orders?

### Services & Activities

- Who assists with medication management, and how are staff trained?
- Is there a preferred pharmacy? Does it coordinate with Medicare Part D plans and provide annual medication reviews?
- Are nursing services available on-site? If not, do staff help arrange care?
- How can residents access physicians, therapists (physical, occupational, speech), or podiatrists?
- Are bed linens, towels, laundry service, and personal hygiene supplies provided? Are there additional fees?
- Are salon/barber services available?
- What recreational, social, and spiritual activities are offered? Can you review a sample activities calendar?
- Are supplies available for independent use outside of scheduled programs?
- Is transportation provided for medical visits or outings? Is there a fee?
- Are there resident or family councils? How often do they meet?
- How are suggestions, complaints, and grievances handled?
- Does the community coordinate hospice care so residents can remain in place at end of life?

**Staff**

- What are staffing levels and philosophies regarding care?
- What qualifications and ongoing training are required for staff?
- Observe staff interactions with residents: are they respectful, attentive, and compassionate?
- How are resident requests addressed promptly?
- Observe staff interactions with each other: are they professional and courteous?
- Can private caregivers/companions be hired? What is the process?
- Does the community use volunteers, and what roles do they fill?
- Does the administrator or director maintain an "open door" policy?

**Moving In**

- What is the move-in process? What paperwork and timelines are required?
- How do staff support new residents who may struggle with the transition?
- How is the initial care assessment conducted, and by whom?
- If a resident is hospitalized or temporarily in a nursing home, is their room held? Are credits given for unused services?
- Does the community provide a written list of resident rights and responsibilities?

**Costs & Fees**

- What is included in the basic monthly rate? Request a written list.
- Are there written fee schedules for additional services? Request a copy.
- How much notice is given before fees change?
- Is a security deposit required, and what is the refund policy?
- Can contracts or service agreements be amended if needed?

**Dining & Food Services**

- How are special diets accommodated?
- How are menus reviewed by a dietitian or nutritionist? Can you review sample menus?
- How often are menus rotated? Can residents or families provide input?
- May residents invite guests to meals? Is there a guest dining room fee, or limit?
- What are the rules for eating in rooms?
- Is assistance with eating provided if needed, and is there a fee?

### Living Spaces & Accommodations

- Are there comfortable shared spaces for residents?
- Are apartments/rooms furnished? What furnishings are included?
- What are the policies on decorating or bringing personal belongings?
- Are overnight guests allowed? Are guest rooms available? What are the fees?
- Is extra storage space available?
- Are accessibility features in place for residents with disabilities? Is parking available for residents with cars?
- Are there gardens, patios, or courtyards for resident use?
- What security measures are in place for residents leaving with family or guests? Is there a sign-in/out policy?
- Are pets allowed? If so, are there fees or deposits? If not, can pets visit?
- Are the grounds clean and well-maintained? Is the community free of unpleasant odors?

### Licensure & Certification

- Is the community licensed as required by the state? Request a copy of the latest inspection report.
- If state law requires the administrator to be licensed or certified, is their certification available?
- Does the staff participate in professional associations such as the state long term care association?

### Safety

- Is there a fire sprinkler system throughout the community?
- Where are smoke detectors located, and how often are fire drills conducted?
- Is there an emergency preparedness and evacuation plan? How is it reviewed with residents?
- How does the community protect residents with dementia or Alzheimer's from unsafe wandering?
- How are hazardous areas (kitchen, laundry, etc.) secured?
- Is the building free of fall hazards? What fall-prevention strategies are in place?

### Location

- Is the community conveniently located near shopping, health care providers, and recreational opportunities?