CHECKLIST FOR CONSUMERS AND PROSPECTIVE RESIDENTS

When you are looking for an assisted living or residential care community 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 move about freely?
- Are there special programs for residents with disabilities?
- How are medical 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?
- What level of service can be accommodated before a resident must move out??
- What are the community’s procedures regarding advance directives and “Do not resuscitate” orders?

**Services and Activities**

- Does staff assist residents in administration of medication? If so, which staff members and how are they trained?
- Does the community 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?
- Are the services of a nurse, physician, podiatrist, and/or a physical, occupational or speech therapist available or arranged?
- Does the community provide bed linens and towels?
- Does the community provide personal laundry service? Is there a fee?
- Does the community provide personal hygiene supplies?
- 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 community coordinate that care with the physician and family? Can residents have their final days without moving again?

Staff

Ask about the community'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 with residents. Are they positive interactions? Courteous? Compassionate?

Does staff handle resident requests in a timely way?

Observe staff interactions with each other. Are they positive interactions? Courteous?

Can private duty companions be hired? What is the procedure for that type of service?

Does the community 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?

Ask about how staff handles residents who experience difficulty transitioning into the community.

How is the initial assessment managed? Who completes the assessment?

If you need hospital or nursing home care, is your room held? What are the associated fees? Is a credit given for unused services (e.g., meals)?

Does the community 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 community have a written schedule of fees for extra services? If so, request a copy.
☐ How much notice is given if there is a fee change?
☐ 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 community accommodate special diets?
☐ Does a dietician or nutritionist review the menus? Request or review copies of the menus.
☐ How often do the menus rotate? Can residents and families be involved in the menu planning?
☐ Are residents allowed to have guests for meals? Is there a separate guest dining room? Is there a fee or are there guidelines for frequency?
☐ What are the criteria for residents to eat meals in their rooms?
☐ If needed, is assistance with feeding available? Is there a fee?

Living Space and Accommodations

☐ Are there adequate community areas for resident use?
☐ Are the resident rooms furnished or unfurnished? What furnishings are included?
☐ What is the policy about personal belongings (e.g., wall hangings and personal décor)?
☐ 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?
☐ What accessibility features does the community offer for individuals 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 community provide security?
☐ What security measures are in place for residents leaving with a family member or guest? Is there a signing out and in policy?
☐ Are pets allowed to reside in the community? If so, are there additional fees and or deposits? If not, are pets allowed to visit?

☐ Are the grounds well maintained and pleasant?

☐ Is the community free of persistent and unpleasant odors?

**Licensure and Certification**

☐ If required by the state, is the community 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**

☐ If required by the state, does the community have a fire sprinkler system throughout the community?

☐ Where are smoke detectors located?

☐ How often does the community have fire drills?

☐ Does the community 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? Are they secured from having access to kitchen, laundry or other potentially hazardous areas?

☐ Is the community free of potential tripping or fall hazards?

☐ Ask what the community does to manage the risk of falls.

**Location**

☐ Is the location of the community convenient to shopping, medical services, and entertainment areas?