

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?