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?
This checklist was developed by the National Center for Assisted Living (NCAL) www.ncal.org

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 guest rooms 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