

## ASSISTED LIVING CHECKLIST

### Personal Care Needs

- Is there a written plan for the care of each resident?
- Does the initial needs assessment include the resident, family, and facility staff, along with a physician?
- Is there an ongoing process for assessing a resident's need for services? How often are those needs evaluated?
- How does the facility accommodate residents with changing needs?
- Is staff available to provide 24-hour assistance with activities of daily living (ADLs)?
- Does the residence have programs for Alzheimer's, dementia, and other special needs?
- How often does a staff member check on a resident's whereabouts and well-being?
- If a resident's behavior changes and becomes verbally or physically abusive, what is the facility's course of action?

### Health Care Needs

- Does a physician/nurse make regular checkups? To what extent is medical care available?
- Will the staff set up medical appointments and transportation for each resident?
- Does the residence's pharmacy provide delivery, consultation, and review of medicines?
- Does staff supervise/assist residents in taking medicine? May residents take their own medications?
- What health care services are available at the facility? Physical therapy? Wound care? Hospice care? Social services?
- Does the residence have a clearly stated procedure for responding to medical emergencies? Is there an arrangement with a nearby hospital?
- Under what circumstances does the facility call the family, or the resident's doctor?

### Resident Services

- What resident services are available onsite?
- 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, and can it be arranged on short notice?

### Location

- Do you like the facility's outward appearance?
- Is the facility convenient for frequent visits by family and friends?
- Is the facility near shopping centers and other entertainment?
- Can the resident access a medical complex easily?
- Is public transportation available and accessible?

### Living Environment

- Is the decor attractive and homey?
- 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?
- Are hand rails available to aid in walking?
- Are floor coverings made of a nonskid material?
- Is the residence clean, free of odors, and appropriately heated/cooled?
- Does the residence have good lighting, sprinklers, and clearly marked exits?
- What is the facility's means of security if a resident wanders?
- Is there an emergency evacuation plan?
- Does the facility hold fire drills?

### Accommodations

- How many living units are in the facility?
- Are there different sizes and types of units available with optional floor plans?
- Are units for single and double occupancy available?
- What percentage of the apartments has been rented and is occupied?
- Is there a waiting list? If so, how long will it take to be admitted?
- Does the residence have furnished/unfurnished rooms?
- May residents decorate their own rooms? Is there adequate storage space?
- Is a 24-hour emergency response system accessible from the unit?
- 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 each kitchen unit have a refrigerator, sink, and cooking element?
- May residents smoke in their units? Are there designated public areas for smoking?

### Meals

- Does the residence provide three nutritionally balanced meals a day, seven days a week? How does the menu vary?
- Does a qualified dietitian plan or approve menus? Is residents' weight routinely monitored?
- Are residents involved in menu planning, and may they request special foods?
- Are common dining areas available?
- 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?
- Can residents eat meals in their units?

### **Social and Recreational Activities**

- What kinds of recreational activities are offered?
- Is there an organized activities program with a posted daily schedule of events?
- Do volunteers and family members come into the residence to participate in or conduct programs?
- Does the facility schedule trips or go to other events off premises?
- Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening)?
- Are religious services held on the premises or are 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 together or perform simple chores for the group as a whole?
- Are pets allowed in the residence? Who is responsible for their care?

### **Other Residents**

- Do residents socialize with each other and appear comfortable and content?
- Do the residents seem to be appropriate housemates for the prospective resident?
- Are visits with residents welcome at any time?

### **Staff**

- What are the hiring procedures and requirements for staff eligibility? Are criminal background checks, references, and certifications required?
- Is there a staff training program in place, and what does it entail?
- Is the administrator available to answer questions or discuss problems, and would you be comfortable dealing with him/her on a daily basis?
- What is the staff-to-resident ratio?
- How long are staff shifts?
- Is the staff courteous to residents and to each other?
- How does the staff respond to your questions?
- Is the staff trained to deal with aggressive residents? Wanderers?

### **Licensure and Certification**

- Does the residence have a current license/certification?
- Does the administrator 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?

### **Contract and Costs**

- Is a contractual agreement available that clearly discloses health care, accommodations, personal care and supportive services, all fees, and admission and discharge provisions?
- May a resident handle his/her own finances, or must a family member or outside party be designated?
- What is the payment schedule?
- Do residents own or rent their unit? Are residents required to purchase renters' insurance for personal property in their units?
- What is the monthly fee? How often can it be increased and for what reasons? What is the history on monthly fee increases?
- What are the specific costs for various levels of services?
- Is there a procedure to pay for temporary services such as skilled nursing care and physical therapy?
- Will a resident's room be held should he/she require a hospital/nursing home stay, and are there charges for the room while vacant?
- 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?
- Are there any government, private, or corporate programs available to help cover costs?
- Do billing, payment, and credit policies seem fair and reasonable?