



Assisted Living Checklist – Where to Start

Moving a parent into assisted living is a big decision. Breaking the process into smaller steps can make it feel more manageable. Many families have been through this, and their experiences can help make the transition easier.

Start by Asking Key Questions

- Is assisted living necessary?
- Can they stay at home with added family or outside help?
- Would a roommate or live-in caregiver work?
- Could they move in with family or friends?
- How open are they to moving?
- Are there special medical, emotional, or financial circumstances to consider?

Finding the Right Community

- Research local and national referral services.
- Contact your state's Department of Human Resources for public resources.
- Ask private referral services if they charge fees.
- Visit communities and compare:
 - cleanliness and safety
 - staff friendliness
 - activities and social opportunities
 - level of care provided

Understanding Costs

- Assisted living costs vary widely depending on location and care needs.
- Ask about:
 - medication management fees
 - laundry services
 - transportation
 - deposits and extra charges
 - how often rates increase

Paying for Care

- Review your parents' finances and long-term affordability.
- Check for:
 - veterans' benefits

- Medicaid eligibility
 - insurance coverage
- Be aware Medicaid has strict financial “look-back” rules.

Organizing Medical & Legal Information

- Keep updated records of:
 - medications
 - Doctors
 - medical history
- Make sure legal documents are current:
 - wills
 - living wills
 - power of attorney
- Gather banking, insurance, and emergency contact information.

Building Support

- Join caregiver support groups.
- Involve family members in decisions and responsibilities.
- Encourage regular visits and phone calls to help your parent(s) stay connected.

Planning the Move

- Bring familiar items:
 - photos
 - favorite decorations
 - meaningful keepsakes
- Create a furniture plan for the new space.
- Ask about pet policies and community rules.

Helping with Emotional Adjustment

- Understand this is a major life change and emotions are normal.
- Encourage participation in community activities.
- Work with caregivers to help your parent(s) adjust socially and emotionally.

Managing Your Own Emotions

- Your life will change too.
- Give yourself time to adjust without guilt.
- Talk openly with family and seek support when needed.

Making the Transition Easier

- Spend move-in day with your parents.
- Involve them in choosing the community.
- Visit multiple times before moving.
- Consider short-term or respite stays before making a final decision.

Handling Problems

- No community is perfect.
- Research facilities through local ombudsman programs.
- Consult elder care attorneys when needed.
- Stay involved and communicate concerns early.