

Assisted Living Consumer Checklist

Compiled from guides produced by Assisted Living Federation of America and American Association of Retired Persons

There are many questions to ask and details to note during this visit. When you meet with the staff and tour the residence, pay attention to the physical appearance, atmosphere, and attitudes of the staff.

Appearance

As you arrive at the residence, do you like its location?

Yes

No

Do you like its outward



appearance and grounds?

As you enter, do you find the décor attractive and homelike?

Is the residence secure?

Are stairs and halls well lit?

Are exits well marked?

Do rooms and bathrooms have handrails and call buttons?

Is the residence accommodating for wheelchairs and walkers?

Are cupboards and shelves easy to reach?

Is the residence clean, free of odors and appropriate temperature?

Are there safety locks on windows and doors?

Are there security and fire safety systems?

Is the floor plan logical and easy to follow?

Are different sized and types of units available?

Are units for single and double occupancy available?

Do residents have their own lockable doors?

Are residents allowed to bring their own furnishings?

Do all units have a telephone and cable TV access?

Atmosphere/Attitude

Are there enough common areas for residents to socialize?

Did you receive a warm greeting from staff welcoming you?

Do the administrator and staff call residents by name?

Does the staff interact warmly with residents?

Does the staff seem overworked, harried or unhappy?

Do residents socialize with each other?

Do residents appear happy and comfortable?

Do the residents seem to be appropriate housemates?

Are staff appropriately dressed, personable and outgoing?

Do staff members treat each other in a professional manner?

Are the staff members that you pass during your tour friendly?

Are visits with the residents welcome at any time?

Is there evidence of an organized activities program?

Do residents participate in activities outside of the residence?

Are residents' pets allowed in the residence?

Do volunteers come to help or conduct programs?



While physical appearance and atmosphere are very important, ultimately long-term quality of care and services is most important. Speak with both staff members and residents when evaluating the quality of care. Find out staff member qualifications and whether they are qualified to deliver the services the residence offers. What kind of training the residence requires or provides and how often and what the staff to resident ratio is during the day and in the evening? You may also want to find out if there is any special training for staff who care for those with Alzheimers disease or other memory impairments. Does the staff help with medication, and what training is required for this activity?

Care Services

Is there a written plan for the care of each resident?

Yes

No

How does the residence assess residents' needs?

Is the plan of care reviewed periodically?

Yes

No

Does the review include the resident,



their family and the staff?

Does the review process include the resident's physician?

Are additional services available if the resident's needs change?

Are there different costs for various levels of service?

Is there an appeals process for dissatisfied residents?

Does the residence have policies for the storage of medication?

Does the residence have policies for assistance with medication?

Does the residence have policies for medication record keeping?

Is self-administration of medication allowed?

Is there staff to coordinate visits with health professionals?

Does a physician or nurse visit regularly to provide checkups?

Does the residence have a procedure for medical emergency?

Can the residence provide a list of available services?

Is staff available to provide 24 hour assistance with ADLs (activities of daily living)?

Does the residence provide housekeeping services?

Does the residence provide transportation?

Can residents arrange for transportation on short notice?

Are pharmacy services offered on site?

Are barber/beautician services offered on site?

You should also stay for a meal during the visit. Use this opportunity to have an informal conversation with residents. Ask them about what they like most and what concerns them about the residence.

Food Services

Yes

No

Do dining room menus vary from day to day and meal to meal?

Are three nutritionally balanced meals provided each day?

Seven day a week?

Are Snacks available?

May a resident request special foods?

May residents eat meals in their rooms?

Are common dining areas available?

Are there set times for meals?

Once you have met with the staff, spoken with residents, toured the residence inside and out, tasted the food and received answers to your questions, you should have a pretty good idea whether a residence seems right for you. **However, before making a decision, you need to review the contract.**

Contracts, Costs and Finances

Yes

No

Is a contractual agreement available upon your visit?

Does it disclose healthcare and supportive services?

Does it disclose all fees?

Does it disclose admission and discharge provisions?

Does it disclose when a contract may be terminated?

Does it disclose refund policies?

Do billing, payment and credit policies seem fair and reasonable?

May a resident handle their own finances if able?

Are residents required to purchase renters insurance?

Is there an appeals process for dissatisfied residents?

