

# Assisted Living Checklist

*Giving guidance to navigate all the options*

Assisted Living Facility Name: \_\_\_\_\_

## Pre-Tour Checklist

### Web Search

- ☐ Is this facility close to a physician's office, a pharmacy and other frequented places?
- ☐ Is this facility located within a convenient distance for family or loved ones to visit regularly?
- ☐ Are there nearby hotels to this facility if it is not situated within a reasonable distance from you or your loved ones?
- ☐ What is the reputation of the surrounding neighborhood/s to this facility?
- ☐ Are you able to find any online reviews (good or bad) regarding this facility?
- ☐ Is this facility listed on the Better Business Bureau?

### Telephonic Research

- ☐ Which payment types are accepted by this facility?
- ☐ Can assistance be offered to help residents with payment if needed?
- ☐ If you happened to come across a worrying online review about this facility, what is their response or explanation for this?
- ☐ Do they offer tours? If so, how long do they usually last?
- ☐ What does this facility offer during a tour? Meals? Meeting other residents?, etc.



# Assisted Living Checklist

*Giving guidance to navigate all the options*

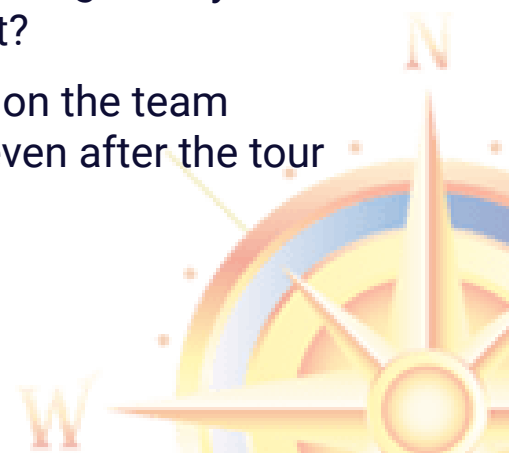
## Tour Checklist

### In Transit

- ☐ Does the neighborhood come across as generally peaceful and relatively quiet?
- ☐ Is there ample access to parking available at the facility?
- ☐ Does the facility cater for wheelchair or other handicapped parking spaces?
- ☐ In the event that your family or loved ones come to visit, will there be parking provided for them?
- ☐ Is the exterior of the facility well maintained, neat and clean?
- ☐ Do the facility grounds have grass, plants and trees?
- ☐ Are there enclosed areas so residents can safely socialize with one another and walk about?

### First Introductions

- ☐ Does your tour guide appear to be friendly, caring and helpful?
- ☐ Do you feel that your tour guide is really listening to your needs and concerns?
- ☐ Do you feel like your tour guide is trying to 'sell' something to you?
- ☐ Is your tour guide making an effort to address and assist everyone on tour with you, or are they only zoning in on you, or your aging loved one and ignoring the rest?
- ☐ Are you able to chat to other staff members on the team at all? This can either be during the tour, or even after the tour has concluded.



# Assisted Living Checklist

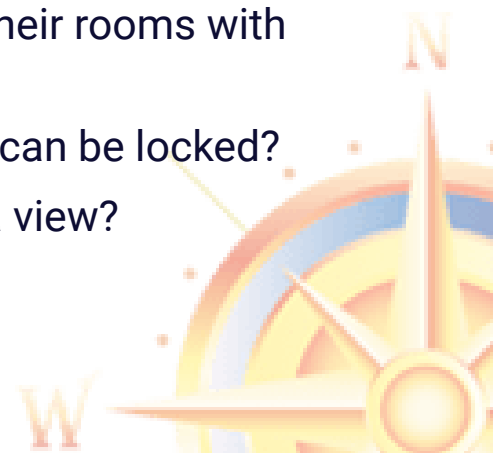
*Giving guidance to navigate all the options*

## Communal Spaces

- ☐ Are the communal spaces in this facility well maintained, neat and clean?
- ☐ Are there communal spaces allocated where residents can welcome family and loved ones who are visiting?
- ☐ Does the facility make an effort to ensure that hallways and other spaces are well lit and that the facility follows an easy-to-navigate layout?
- ☐ Does the facility have sturdy handrails for added safety?
- ☐ Does the facility cater for wheelchair users?
- ☐ Are pets allowed within the facility? If so, which types or breeds are preferred?

## Living Spaces

- ☐ Do residents typically share rooms, or are private rooms available?
- ☐ Do you have the option to view all types of rooms available at this facility?
- ☐ Are there shared bathrooms for residents, or does each resident have access to their own private, handicap-friendly bathroom?
- ☐ Do residents have the option to personalize their rooms with personal possessions?
- ☐ Do rooms have adequate storage space that can be locked?
- ☐ Do rooms have good lighting and access to a view?



# Assisted Living Checklist

*Giving guidance to navigate all the options*

## Staff

- ☐ Do staff members address residents by their name?
- ☐ Are staff quick to address requests for help from residents?
- ☐ Do staff members address one another in a professional manner?
- ☐ How qualified are staff, and how do staff get vetted before joining the facility?

## Meals

- ☐ Are dining facilities well maintained, neat and clean?
- ☐ Does the facility provide three healthy meals a day?  
If not, how many meals are provided each day?
- ☐ Do residents have access to healthy snacks in between meals?
- ☐ Can the facility cater to special dietary requirements?
- ☐ Are residents allowed to bring food to their rooms,  
or are there communal kitchens they have access to?
- ☐ Can family or loved ones join residents for meal times?
- ☐ Are residents generally satisfied with the food provided  
at the facility?
- ☐ Do you have the opportunity to drop in for a meal and  
see for yourself?
- ☐ Are private communal dining areas available  
for family celebrations?



# Assisted Living Checklist

*Giving guidance to navigate all the options*

## Activities

- ☐ Is there an activities schedule of sorts for residents that has some variety in the types of activities offered?
- ☐ Are there any activities that facilitate scheduled interaction with people outside the facility, such as church groups, volunteer services or other outings

## Services Offered

- ☐ What services does the facility have on offer?  
(Available on the premises or contracted to come on certain days)  
Ex. Hairdresser, Laundry services, Cleaning services, etc.
- ☐ Are there reliable transportation services available for residents?



# Assisted Living Checklist

*Giving guidance to navigate all the options*

## Post-Tour Checklist

### Required Documentation

- ☐ Can you request a sample of an admissions contract?
- ☐ Can you request a copy of the Resident Bill of Rights?
- ☐ Can you request a copy of the most up-to-date survey results from the relevant state regulatory inspectors?
- ☐ Can you request a copy of the weekly event and activities schedule?
- ☐ Can you request a copy of the dining and snacks menu for the week?

### Cost

- ☐ How much will Assisted Living care cost at this facility?
- ☐ Does this cost include moving-in fees, or service fees like cleaning, meals and laundry?
- ☐ Does transportation incur an additional charge per outing, appointment or weekly grocery shopping trip?
- ☐ What are the circumstances under which costs fluctuate at this facility?
- ☐ How does this facility obtain funding?
- ☐ How stable is the funding of this facility?
- ☐ Can this facility assist with the necessary paperwork for Medicare, Medicaid or VA to pay for care?



# Assisted Living Checklist

*Giving guidance to navigate all the options*

## Staff

- ☐ What is the current staff-to-resident ratio?
- ☐ What is the usual staff turnover rate at this facility?
- ☐ How much training do staff members receive at the facility?
- ☐ What does the facility do in the event of staff burnout?
- ☐ How does the facility retain top staff?

## Care Plan & Next Steps

- ☐ Does an initial assessment of needs take place?
- ☐ Based on the initial assessment, is a written care plan developed?
- ☐ Who is responsible for developing this care plan, and how often does this get re-assessed?
- ☐ Who is responsible for medication management?
- ☐ Is this facility affiliated with a specific hospital or nursing home in the event that additional care is needed?
- ☐ What are the current emergency procedures that are in place at the facility? (both medical and other)



# Assisted Living Checklist

*Giving guidance to navigate all the options*

## Additional Questions

- ☐ Is it a requirement for residents to have renter's insurance for their rooms/units/flatlets?
- ☐ Do residents have access to religious services within the facility grounds or nearby?
- ☐ How strict are visiting hours for residents?
- ☐ Does the facility cater for overnight guests at the facility?
- ☐ Does the facility cater for private time for couples in the event that only one spouse is living within the facility grounds?
- ☐ Does the facility have any policies regarding sexual interaction between residents?
- ☐ Does the facility have an emergency preparedness protocol?

***If you or a loved one requires urgent assistance, get in touch with our team of local experts today.***

 Call us on 602-845-1320

 Visit our website [www.optionsforseniorliving.com](http://www.optionsforseniorliving.com)

 Email us at [support@optionsfsl.com](mailto:support@optionsfsl.com)

