

## Assisted Living Community – Administrative Checklist

Take this guide with you when you speak to the community relations or management staff. Asking the right questions upfront will help you make an informed decision about the right assisted living community for you.

### Community Information

Community Name:	Contact:
E-Mail:	Phone:

<b>License &amp; Certifications</b>	Yes	No	Notes
What licenses does the community hold? List:			
Does the community have additional certifications or accreditations? (CARF) List:			
What certifications does the staff hold? List:			
Have you reviewed the last state inspection report?			
Have there been any stop placements within the last 3 years?			
Is staff provided with continuing education?			

<b>Healthcare &amp; Medication</b>	Yes	No	Notes
Is there an on-call physician, nurse practitioner or physician’s assistant?			
Is there a written care plan for each resident?			
Can family, staff and the primary physician participate in designing the care plan?			
How often are resident needs re-assessed?			Timeframe:
Is self-administration of medication allowed?			
What is the policy for responding to a resident’s medical emergency?			
What is the policy on medication storage, dispensing and record keeping?			

<b>Meals</b>	Yes	No	Notes
Are special (low-sodium, low-sugar, ethnic) diets accommodated?			
Do residents have input into meal planning?			
Do residents have a choice of foods for each meal?			
Are healthy snacks available at all times?			
May residents have their meal in their apartment/room?			
Are there special holiday meals that families can attend?			
Are the vegetables and meats purchased organically grown?			
What is the policy and cost for family members to eat with residents?			

<b>Social, Cultural &amp; Wellness Activities</b>	Yes	No	Notes
Is there a monthly activities calendar published and posted?			
Does the community have a volunteer program?			
Do the fitness offerings accommodate varying abilities?			
What are the fitness and exercise offerings? List:			
What social activities are offered? List:			

<b>Personal Services (ADLs, special needs)</b>	Yes	No	Notes
May the resident hire outside home care and/or home health providers to provide services within the assisted living community?			
What services are available?			
<ul style="list-style-type: none"> <li>• Assistance with activities of daily living</li> <li>• Medication management</li> <li>• Foot care</li> <li>• Laundry service</li> </ul>			
Other services? List:			

<b>Transportation</b>	Yes	No	Notes
Is transportation available for specific appointments?			
If yes, what is the schedule?			
Are there any limitations?			
Is there guest parking?			

<b>Pets</b>	Yes	No	Notes
Are pets allowed?			
If so, what types?			
What is the pet deposit amount, if any?			
Are there provisions if the resident goes on vacation or has to be hospitalized?			

<b>Security &amp; Safety</b>	Yes	No	Notes
Does staff undergo a background check? Which staff? What type? (driver's license, criminal, national or state)			
What policies are in place to protect the personal property of each resident?			

<b>Length of Stay/Discharge</b>	Notes
What is the average length of stay for residents?	
What conditions require the discharge or transfer of a resident?	

<b>Policies &amp; Cost</b>	Notes
What are the contract options available?	
What are the entrance fees?	
What are the policies for refunding entrance or waiting list deposit fees?	
What is the pet deposit?	

Policies & Cost (cont.)	Notes
What services are included in the monthly rate? List:	
What additional fees are charged for care, services and supplies?	
What are the billing, payment and credit policies?	
What is the policy for fee increases?	
Under what conditions can a contract be terminated?	
Is insurance required to cover personal property and possessions?	
What is the policy if a resident is no longer able to pay with private funds and is Medicaid eligible?	
What programs are available to help cover the cost of services such as government, corporate, or private programs? ( e.g., Veteran’s Administration, Life Settlement, Bridge loans)	