

Assisted Living Checklist

It can be confusing and downright overwhelming trying to choose the best assisted living community for yourself or a loved one. With so many options, features and variations available, it is hard to even know where to start. Naturally you will want to tour the facilities that seem to be a likely fit, but what should you look for?



Here is a helpful checklist to help you keep track of the important factors you need to observe and consider. Reviewing your notes from each tour will help to simplify the process of making a choice, we offer the following check list of [things] broken down into simple categories.

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Cleanliness

Cleanliness is clearly an essential factor for healthy, pleasant living conditions. As you tour the premises, please observe and record your observations regarding the following:

Grounds & exterior appearance of building(s)

Are the premises

- ✓ Clean? Yes No Somewhat Notes:

- ✓ Well-maintained? Yes No Somewhat Notes:

- ✓ Free of potential hazards? Yes No Somewhat Notes:

Interior cleanliness, including in public and group-activity areas

- ✓ Look closely at the conditions of all areas that you tour to evaluate whether they are regularly and thoroughly cleaned.
Notes:

- ✓ If cleaning services are provided in residential areas, ask for specifics about what is offered.
Notes:

- ✓ Check the condition of restrooms.
Notes:

- ✓ Ask to see the kitchen as well as the dining area (if pertinent).
Notes:

- ✓ Are there objectionable odors evident?
 Yes No Somewhat Notes:

- ✓ Do residents (and staff) appear to be clean and well-kempt?
 Yes No Somewhat Notes:

- ✓ Ask if rooms are thoroughly cleaned, painted and re-carpeted (if needed) when a resident moves out?
 Yes No Notes:

Staff demeanor

All personnel should be consistently professional, attentive, kind and respectful in all dealings with residents, visitors and fellow employees. Be alert to the actions and behavior of the staff as you tour the facility. A poor attitude is often a reflection of low-morale caused by poor management from the top down. Take particular note of the following:

- ✓ How would you describe staff interactions with residents and others?
 Good Ok Poor

Notes:

- ✓ Does staff make a point of addressing residents at eye level?
 Yes No Somewhat

Notes:

- ✓ Does staff “talk down” to residents, or speak as though they aren’t present?
 Yes No Somewhat

Notes:

- ✓ If a resident asks for help, is someone readily available and willing to assist? (For instance, if your tour guide was asked for help, did he or she take the time to assist or to obtain prompt assistance?)
 Yes No

Notes:

Outdoor areas

For many residents of assisted living communities, having pleasant, safe outdoor premises is vital to their ongoing mental and physical health. If you or your loved one enjoys being outside in the fresh air and sunshine, be sure to check the outdoor areas carefully, making a particular note of the following:

- ✓ Is there room to move around outside?
 Yes No Somewhat
Notes:

- ✓ Are there gardens with raised flower or vegetable beds for residents' use?
 Yes No Somewhat
Notes:

- ✓ How is space allocated? Notes:
Are there comfortable places for residents to sit and chat and/or watch activity in the neighborhood? Yes No Somewhat
Notes:

- ✓ Are sidewalks level?
 Yes No
Notes:

- ✓ Are the grounds free of tripping hazards?
 Yes No Somewhat
Notes:

- ✓ Is there monitoring at the doors should a resident attempt to go outside during inclement weather?
 Yes No
Notes:

- ✓ What outdoor activities are regularly conducted (picnics, musical events, gardening, games, etc.)? Notes:

- ✓ Is the neighborhood quiet and safe?
 Yes No Somewhat Notes:

Scheduled activities

Regularly scheduled activities and special events are important to many residents of assisted living communities. Ask for a list of scheduled activities, and compare them to the interests of you or your loved one. Try to visit the facility when an activity is scheduled to get a good idea of what can be expected. What activities are important to you/your loved one? Regular religious services? Happy hour? Bingo? Field trips to see movies or shows? Make a list below, and note whether or not the facility you're considering offers these activities.

Notes:

Meals

Mealtime is often a highlight of the day for assisted living residents, so be sure to check out what is offered. Good facilities will always welcome guests for mealtime, so please take the opportunity to share a meal, and take note of the following:

- ✓ Is the food appetizing and served at an appropriate temperature?
 Yes No Somewhat

Notes:

- ✓ Ask to see a menu of future meals. Is there good, appetizing variety offered?
 Yes No Somewhat

Notes:

- ✓ Ask if special dietary needs are accommodated (vegan, diabetic, gluten-free, low sodium).
 Yes No Somewhat

Notes:

Security & safety

Ask and record the answers to the following questions:

- ✓ What time are doors locked at night and unlocked in the morning?

Notes:

- ✓ Who has access afterhours?

Notes:

- ✓ Is the main reception desk always staffed during the day?

Yes No

At night? Yes No

- ✓ Does the facility use Life Alert pendants? Yes No

If so, are they included in cost of the rent? Yes No

Do they have an on-premises locator so they can quickly locate a resident who has fallen? Yes No

What is the response time should the pendant be activated?

Notes:

- ✓ What are the protocols/procedures for family members to access the area in case of emergency, day or night?

Notes:

- ✓ What are staffing levels throughout the day/night?

Notes:

- ✓ Who is available to help if there is an emergency at night?

Notes:

Personal care services

- ✓ What are the levels and kinds of personal care available?

Notes:

- ✓ What personal care services are **not** available?

Notes:

- ✓ Can staff do Hoyer lifts or two person transfers?

Yes No

Notes:

- ✓ Do they accept sliding scale diabetes?

Yes No

Notes:

- ✓ Is personal care cost based on points or levels?

Notes:

- ✓ Can they provide care through end of life?

Yes No

Notes:

State/Government oversight

All assisted living facilities should have their licensing and government review information readily available. Take the time to at least ask about the following:

- ✓ When was their last state survey, and how were they rated?

Notes:

- ✓ What areas were identified as needing improvement, and what measures have been taken to address them?

Notes:

“Moving out” protocols and procedures

Under some circumstances a resident may be asked to leave an assisted living community. It is important to learn the answers to the following questions beforehand:

- ✓ Under what circumstances may a resident be asked or expected to move out?

Notes:

- ✓ How much notice is given in advance before a resident is expected to vacate the premises?

Notes:

- ✓ Does the facility assist with logistics and finding resources for a resident who is asked to leave?

Notes:

Feedback from residents & their families

One of the best ways to get a clear picture of the conditions and atmosphere of any facility is to simply ask the people who are directly affected how they feel about the living conditions. Take the opportunity to do the following (and keep notes of the responses you obtain.)

- ✓ Chat with residents who are available in the common areas, outdoors, riding elevators with you, etc. Ask how they feel about the community generally, what they like most, and if there are areas they would like to see improved.

Notes:

- ✓ Talk to visiting family members and ask them their impressions of the community and how satisfied they are with the care their loved ones are receiving.

Notes:

- ✓ Ask the facility representatives for referrals and written testimonials from residents and their families.

Notes:

- ✓ Check for online reviews of the facility.

Notes:

Comparing & evaluating facilities

Recording and referring back to your notes will help you to compare and evaluate the various assisted living communities that you are considering. You and your loved one(s) are the only people who can determine what features are most important for living a happy, healthy life in a community.

In addition, you should definitely take into account your “gut feelings” about any facility. No matter how good a place may look on paper, if it doesn’t feel like the right place, then it probably is not. Do your research well, tour facilities with open eyes and an open mind, and then trust your instinct to choose the best assisted living community for you or your loved one.