

Assisted Living Touring Checklist

Questions to ask and what to look for when visiting a community. Bring a copy to each visit.

Community

Date visited

Contact name

Questions to ask

CARE AND STAFFING

- ☐ 1. Does the community provide the appropriate level of personal assistance?
- ☐ 2. How are individual care needs assessed and reviewed?
- ☐ 3. What staff members are available during the day and overnight?
- ☐ 4. What nursing services are offered, and when are licensed nurses available?
- ☐ 5. What happens if a resident requires additional assistance?

HEALTH CHANGES

- ☐ 6. What are the community's policies for hospitalization, rehabilitation, and returning to the community?

DAILY LIFE AND FAMILY

- ☐ 7. Are social activities and dining options appropriate for the resident's interests?
- ☐ 8. How are families involved in care planning and communication?

SAFETY AND RECORDS

- ☐ 9. What emergency and hurricane preparedness procedures are in place?
- ☐ 10. What do state licensing and inspection records indicate?

During and after the visit

WHAT TO OBSERVE

- ☐ How staff speak with and respond to residents
- ☐ Cleanliness and upkeep of common areas and apartments
- ☐ Whether residents are engaged or mostly idle
- ☐ A meal in the dining room, if you can join one
- ☐ How quickly calls for assistance are answered

WHAT TO REVIEW BEFORE SIGNING

- ☐ The resident agreement and fee schedule
- ☐ How and when fees can change
- ☐ Policies for a resident whose needs change
- ☐ Notice, discharge, and refund provisions

Notes

My role in your transition. I help families with the real estate and home-sale side of a move: understanding the home's value, timing the sale, preparing the property, and coordinating the details. I don't assess medical needs or determine the appropriate level of care. The choice of a community belongs to the individual and their family, guided by healthcare professionals and the community's care assessment team.