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*for those*  
*you care about*

# Assisted Living: Asking the Right Questions

**O**f you have decided that an assisted living residence is the right choice for you or someone you care for, this checklist will help you choose the right residence to meet your needs. If you are still trying to decide whether an assisted living residence is the right choice or are trying to find a list of residences to choose from, you may want to read AARP's Tip Sheet titled "Assisted Living: Weighing the Options." Make a copy of this checklist for each of the residences you are considering. It may make comparing the residences a little easier.

## The Call

Once you have a list of residences to visit, make a telephone call to each one. Think about what is important in a new home for you, things such as location, size, and types of services. Remember that the person you speak with will most likely be a marketing or sales representative whose job is to promote the residence. Using the checklist on this Tip Sheet can help narrow down the list of residences to visit.

## The Checklist

The following checklist will help you compare residences. Choosing a quality assisted living residence can be a challenge. Remember that it can be expensive and is a long-term major life decision. If you are looking for yourself, try not to make the visits and decisions alone. Talk with family members and friends. Learning as much as you can about assisted living and each of the residences you are considering is the best way to gain the confidence you will need to be comfortable that you are making the best choice.

## The Visit

Take your checklist and any questions you noted when reviewing the residences materials so you can ask the staff about them during your visit. As you meet with staff and tour a residence, pay close attention to how you feel and what is going on around you. Spend time with the staff and residents; ask them what they like and dislike about the residence. It is a good idea to make more than one visit; an unscheduled visit on a weekend or in the evening might be very helpful in your decision making.

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## Residence Name:

Check: First Visit  Second Visit  Date(s) Visited:

Morning  Afternoon  Evening

Circle: Mon Tue Wed Thu Fri Sat Sun

*You may want to attach the residence's rate sheet for easier comparison.*

## The Call:

How many living units are in the residence? \_\_\_\_\_

Where is the residence located? \_\_\_\_\_

Are different size and types of units available?  Yes  No

Do any units have kitchens or kitchenettes?  Yes  No

Are all the rooms private?  Yes  No

Are bathrooms private?  Yes  No

Does the residence offer special care units, such as those serving people with Alzheimer's disease?  Yes  No

Is a contract available that details all fees, services, and admission and discharge policies?  Yes  No

Is there a written care plan for each resident?  Yes  No

What role does the resident have in developing the care plan? \_\_\_\_\_

Are additional services available on the same campus if a resident's needs change?  Yes  No

Can residents choose their own doctors, therapists, or pharmacies?  Yes  No

How does the residence bill for services? \_\_\_\_\_

What if a resident runs out of money? \_\_\_\_\_

Under what conditions would a resident have to leave the residence? \_\_\_\_\_

## The Visit:

Is the residence clean?  Yes  No

Is the residence cheerful?  Yes  No

Do you feel good about the residence?  Yes  No

Are stairs and hallways well lit?  Yes  No

Are exits well marked?  Yes  No

Do rooms and bathrooms have handrails and call buttons?  Yes  No

Are there safety locks on the doors and windows?  Yes  No

Are there security and fire safety systems?  Yes  No

Is there an emergency generator or alternate power source?  Yes  No

Is the floor plan logical and easy to follow?  Yes  No

Are rooms large enough for a resident's needs?  Yes  No

Are there kitchens or kitchenettes?  Yes  No

Are there enough common areas, such as dens and living rooms?  Yes  No

What special services are available?

Circle all that apply: bank café beauty salon other (make notes below)

### The Contract:

Is the contract easy to read?  Yes  No

Do you understand everything in it?  Yes  No

Are specific services provided by the residence?  Yes  No

Does the contract include all of the services you are looking for?  Yes  No

How frequently are services provided? \_\_\_\_\_

What do additional services cost? \_\_\_\_\_

Are health care services included?  Yes  No

Which ones? \_\_\_\_\_

When and where are meals served? \_\_\_\_\_

Are all meals served 7 days a week?  Yes  No

Does the contract address levels of care?  Yes  No

How many levels? \_\_\_\_\_

Who determines level of care? \_\_\_\_\_

Are there services for each level?  Yes  No

Are linens/laundry provided?  Yes  No

Are transportation services provided?  Yes  No

Is there a parking fee for residents?  Yes  No for visitors  Yes  No

Does the residence offer worship services?  Yes  No

Is transportation to worship services provided?  Yes  No

What are the entrance fee(s)? \_\_\_\_\_

What is the monthly rent? \_\_\_\_\_

What is the security deposit? \_\_\_\_\_

Are deposits refundable?  Yes  No

Are utilities included?  Yes  No

Which ones? \_\_\_\_\_

Is telephone included?  Yes  No Long distance?  Yes  No

How are rate increases or late payments handled?

Does the contract cover transfer and discharge policies?  Yes  No

Who makes a transfer or discharge decision? \_\_\_\_\_

How much notice is given to residents who have to leave? \_\_\_\_\_

Is the living area held if the resident is in the hospital?  Yes  No

For what cost? \_\_\_\_\_

Can you have a pet?  Yes  No

Can you have personal furniture?  Yes  No

Does the contract deny your right to bring legal action against the residence for injury, negligence, or other cause?  Yes  No

Can you come and go at will?  Yes  No

Can personal visitors come and go at will?  Yes  No



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