

Assisted Living Checklist



When you are looking for an assisted living community for yourself or a loved one, this checklist can help you evaluate whether a particular community meets your care needs and preferences.

Name of Community _____

Moving In

What does the moving in process entail? _____

What are the paperwork requirements and the time frames involved? _____

How is the initial assessment managed? _____

Who completes the assessment? _____

Service Planning

Are the family and the resident involved in the service planning process? _____

How often are residents' needs assessed? _____

Who completes the assessment? _____

Are there special programs for memory-impaired residents and residents suffering with dementia? _____

Are there accommodations for memory-impaired residents to be outside and exercise? _____

How are emergency situations managed? _____

What is the protocol for such events? _____

What happens if the health care needs of a resident change? _____

Under what conditions are residents asked to move if there is a change in health status? _____

Services and Activities

Does staff assist residents in administration of medication?

Does the residence use a particular pharmacy?

If applicable, does that pharmacy participate in the individual's Medicare Part D prescription drug plan?

Are there professional nursing services on-site?

If not, does the staff assist residents and families in making arrangements through a home health agency?

Are the services of a physical, occupational, or speech therapist available or arranged?

Is transportation provided for medical appointments and recreational purposes?

Is there a fee?

Are there resident and family councils?
How often do they meet?

What are the suggestion, complaint, or grievance procedures?

What recreational and spiritual activities are available? (Obtain or review a copy of the activities calendar.)

Staff

Ask about the residence's staffing patterns and philosophy about staffing.

What training and qualifications are required for staff?

Are there on-going training programs provided for staff?

Observe staff and resident interactions.
Are they positive? Courteous?

Cost and Fees

What is included in the basic monthly cost?
(Ask for a written copy.)

Does the residence have a written schedule
of fees for extra services? (If so, request a copy.)

Under what circumstances might the
fees change?

How much notice is given if there is
a fee increase?

Is there a security deposit? What is the
refund policy?

Can service agreements and/or contracts be
amended or modified?

Dining and Food Services

Does the residence accommodate
special diets?

Does a dietician or nutritionist review the
menus? (Request or review copies.)

What are the criteria for residents to eat
meals in their rooms?

Living Space and Accommodations

Are the resident rooms furnished or unfurnished?

What is the policy about personal belongings?

Are there patios and courtyards available
for resident use? Is there an area for
resident gardening?

Does the residence provide security?

Are pets allowed to reside in the residence?

If so, are there additional fees and/or deposits?

If not, are pets allowed to visit?

Licensure and Certification

Is the residence licensed? (Ask to review the last licensing/certification report.)

If the state requires the administrator to be licensed or certified, is it current?

Does the staff actively participate in trade or professional associations?

Safety

Does the residence have an emergency preparedness plan?

How are the emergency and evacuation plans reviewed with the resident after admission?

Does the residence have a fire sprinkler system throughout the residence?

Where are the smoke detectors located?

Please use another sheet of paper if you need additional space to include all information.

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