

Consumer Checklist

Use this checklist when touring an Assisted Living community to help find the best fit.

○ Atmosphere

- Is the community attractive and homelike?
- Do the staff member call residents by name and interact warmly with them?
- Do residents socialize with each other and appear happy and comfortable?
- Are you able to talk with residents about how they like the community and staff?
- Do the residents seem to be appropriate housemates for you or your loved one?

○ Physical Features

- Is the community clean, free of odors and appropriately heated/cooled?
- Does the community have fire sprinklers and clearly marked exits?
- If the community provides dementia care, does it have a means of security if a resident wanders?
- If desired, what furnishings are provided?
- Do all units have a telephone and cable/satellite TV and how is billing handled?
- Is a kitchen area/unit provided with a refrigerator, sink and cooking element?
- May residents smoke in their units? In public spaces?

○ Contracts, Costs & Finances

- Review the contractual agreement that discloses services, fees, as well as admission and discharge provisions.
- What is included in the monthly fee? Ask for a written copy.
- Is there a procedure to pay for additional services when the services are needed on a temporary basis?
- What happens when a resident's needs change?
- Are there different costs for various levels or categories of services?
- Under what circumstances might the fees change?
- When may a contract be terminated and what is the refund policy?
- Are there any government or corporate programs available to help cover the cost of services to the resident?

○ Medication & Health Care

- What is the policy regarding medication storage and assistance with medication administration?
- How many hours of medication training do staff receive?
- Are staff available to assist residents who experience memory, orientation, or judgment losses?
- What is the procedure for responding to a resident's medical emergency?
- To what extent are medical services available, and how are these services provided?

○ Services

- Obtain a list of services available.
- What is the community's process for assessing a potential resident's needs?

- Are additional services available if the resident's needs change?
- Are there special programs for memory impaired residents and those with dementia?
- Are there fees to provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents?
- Can residents arrange for transportation on fairly short notice?

○Staff

- What training and qualifications do the staff have?
- Observe staff and resident interactions. Are they positive?
- Did you receive a warm greeting from staff welcoming you to the community?
- Do the staff members treat each other in a professional manner?
- Is a licensed nurse available on-site? If so, during what hours?
- Is staff awake and available at night?

○Social & Recreational Activities

- What is the activities program?
- Do residents participate in activities outside of the community?
- Do volunteers, including family members, come into the community to help with or conduct programs?
- Are residents' pets allowed in the community? Who is responsible for their care?
- Does the community have its own pets?

○Food Service

- May meals be provided at a time a resident would like or are there set times for meals?
- Are menus reviewed by a nutritionist?
- May a resident request special foods?
- May residents eat meals in their units?

○Make Sure You...

- Know what the service package includes
- Know all costs associated with your service package
- Know about additional services and their associated fees
- Know the circumstances under which fees might change
- Understand the admission agreement
- Understand resident rights and responsibilities
- Understand the services planning process
- Know about the criteria and policies associated with leaving the community
- Contact the state licensing entity (www.cclid.ca.gov) for information on the community's license