

# Use this checklist when visiting and evaluating a potential Assisted Living or Memory Care community:



## Environment

- As you arrive at the community, do you like its location and outward appearance?
- As you enter the lobby and tour the community, is the décor attractive and homelike?
- Do you receive a warm greeting from staff welcoming you to the community?
- Does the executive director call residents by name and interact warmly with them as you tour the community?
- 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?
- Are staff members appropriately dressed, personable, and outgoing?
- Do the staff members treat each other in a professional manner?
- Are the staff members that you pass during your tour friendly to you?
- Are visits with the resident welcome at any time?

## Physical Features

- Is the community well-designed for your needs?
- Is the floor plan easy to follow?
- Are doorways, hallways, and rooms accommodating to wheelchairs and walkers?
- Are elevators available for those unable to use stairways?
- Are handrails available to aid in walking?
- Are cupboards and shelves easy to reach?
- Are floors of a non-skid material and carpets firm to ease walking?
- Does the community have good natural and artificial lighting?
- Is the community clean, free of odors, and appropriately heated/cooled?
- Does the community have sprinklers, smoke detectors, and clearly marked exits?

- Does the community have a means of security if a resident wanders?

## Needs Assessments, Residency Agreements, Costs & Finances

- Is a residency agreement available that discloses personal care and supportive services, all fees, as well as move-in and move-out provisions?
- What are the policies for refunds and transfers?
- Is there a written plan of care for each resident? How frequently is it reviewed and updated?
- Does the community have a process for assessing a resident's need for services, and are those needs addressed periodically?
- Does this periodic assessment process include the resident, his or her family, and community staff, along with the resident's physician?
- Are there any government, private, or corporate programs available to help cover the cost of services to the resident?
- Are additional services available if the resident's needs change?
- Are there different costs for various levels or categories of personal care?
- Do billing, payment, and credit policies seem fair and reasonable?
- Are residents required to purchase renters' insurance for personal property in their units?
- Is there an appeals process for dissatisfied residents?

## Medication & Health Care

- Does the community have specific policies regarding storage of medication, assistance with medications, training and supervision of staff, and record keeping?
- Is self-administration of medication allowed?
- Is there a staff person to coordinate home healthcare visits from a nurse, physical therapist, occupational therapist, etc., if needed?



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# Assisted Living Evaluation Checklist (Page 2)

## **(Medication & Health Care, Continued)**

- Does the community have a clearly stated procedure for responding to a resident's medical emergency?
- To what extent are ancillary services available, and how are these services provided? Ask if there is an additional charge for any of these services.

## **Services & Amenities**

- Can the community provide a list of personal care services available?
- Is staff available to provide 24-hour assistance with activities of daily living (ADLs) if needed? ADLs include dressing, eating, mobility, hygiene and grooming, bathing, and toileting.
- Does the community provide housekeeping services in personal living spaces?
- Can residents arrange for transportation on fairly short notice?
- Are barber/beautician services offered on-site?
- Does the community provide scheduled transportation to doctors' offices, the hairdresser, shopping, and other activities desired by residents?

## **Individual Apartment Features**

- Are different sizes and types of apartments available?
- Are apartments for single and double occupancy available?
- Do residents have their own lockable doors?
- Is a 24-hour emergency response system accessible from the apartment?
- Are bathrooms private and designed to accommodate wheelchairs and walkers?
- Are residents able to bring their own furnishings for their apartment? What may they bring? What is provided?
- Do all apartments have a telephone, cable TV, and internet access? How is billing handled?
- Is a kitchen area provided with a refrigerator, sink, and cooking element?
- May residents keep food in their apartments?
- May residents smoke in their apartments? In public spaces?
- May residents decorate their own apartments?

## **Social & Recreational Activities**

- Is there evidence of organized activities, such as a posted daily schedule, events in progress, reading materials, visitors, etc.?

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

## **Food Service**

- Do dining room menus vary from day to day and meal to meal?
- Does the community provide three nutritionally balanced meals a day, seven days a week?
- Are snacks available?
- May a resident request special foods, and can the community accommodate special dietary needs?
- Are common dining areas available?
- May residents eat meals in their apartment or suite?
- May meals be provided at a time a resident would like, or are there set times for meals?

## **Additional Questions**

- Does the community conduct criminal background checks on employees?
- Does the community train staff on elder abuse and neglect? Is there a policy for reporting suspected abuse?
- Does the community have a special wing or floor for residents with cognitive impairments such as Alzheimer's disease? If so, is it secured?
- Does the community allow hospice to come in and care for residents?
- Does the community accept long-term care insurance?
- Does the community allow a loved one, such as a grandchild, to spend the night? Is there a charge?
- Does the community participate in the Veterans' Administration Aide and Attendance Program? Will the community help complete the paperwork?
- Does the community accept Medicaid?
- What are the most common reasons why a resident may be asked to move out of the community?



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