



SENIOR HOUSING CHECKLIST

Chapter 9 of *The Complete Eldercare Planner*

Today's Date _____

Name of Establishment _____

Address _____

City _____

State/Zip _____

Main Telephone Number _____

Website _____

Name and Title of Contact Person _____

Direct Telephone Number _____

Cell Phone _____

E-Mail _____

Getting started

- ✓ During the initial phone call, inquire about levels of care offered. If the housing option does not offer any levels of on-site health care or in-home assisted-living services, weigh that fact against the possibility of your elder having to move again down the road.
- ✓ Find out if a future wait list exists. It may be worth putting down a small deposit now, especially if this housing option is one of the best around.
- ✓ Before visiting, check with local consumer organizations, the Better Business Bureau and state regulatory agencies to see if complaints or lawsuits have been filed.
- ✓ Visit as many different choices as possible. Stop by the community unannounced and at different times of day and night. Typically you'll find different staff members on duty on certain days and on weekends.

The On-site Visit

- ✓ Licensing, accreditations, and current state inspection reports
- ✓ Proof of ownership and financial stability
- ✓ Legal agreements and billing procedures
- ✓ Written agreements regarding levels of care provided (look for written policies on how they handle increased frailty, the diagnosis of dementia and health assessments)
- ✓ Qualifications of staff administering medications, and medication management procedures
- ✓ Proof of state and federal criminal checks for all workers

- ✓ Advance medical directives policies including Do Not Resuscitate (DNR) orders
- ✓ Menus, activity calendars, and resident and family newsletters
- ✓ Resident satisfaction rating reports (ask permission to attend a resident/family/staff council meeting)
- ✓ Resident rules and regulations, resident termination conditions and procedures
- ✓ Ask to meet the on-site resident advocate representative
- ✓ Procedures on keeping family members informed
- ✓ Complaint filing procedures
- ✓ Procedures in the event of theft of elder's personal possessions

Health care questions

- *How are medications managed?*
- *What is the availability of doctor and nursing staff?*
- *How are medical emergencies handled?*
- *Who decides when a resident is transferred to the health care unit?*
- *What is the health evaluation procedure?*
- *Will the staff work with my elder's current physician?*
- *What are the physical and chemical restraint and bedrail policies?*
- *How long will an apartment be held if a resident has to be hospitalized?*
- *Are on-site physical therapy and rehab services offered?*

Financial questions

- *What are the total costs? What is not included in the costs? (Ask about “hidden fees” like catheters, rubber gloves, bandages, skin lotions, and wheelchair rental)*
- *What costs are covered by Medicare and Medicare insurance policies?*
- *How does one qualify for Medicaid?*
- *What veteran’s benefits are available?*
- *Are fees refundable? Under what circumstances?*
- *Is there a reduction in fees for part-time residents?*
- *What fees are residents obligated to pay for while being cared for in the nursing units?*
- *Are there cost adjustments for a couple when one is relocated for health care reasons?*
- *What are the resident's costs upon remarriage?*
- *How will future expansion and refurbishing building plans affects costs?*
- *How are residents kept informed of the community’s financial status?*
- *Are residents required to have long-term care insurance in place?*
- *What happens if the resident’s money and insurance coverage runs out?*
- *Does each resident have an individual savings account for incidentals?*

Quality of Life considerations

- ✓ Proximity to family and friends; visitation and overnight guest policies
- ✓ Levels of care offered, including health care transportation for patients

- ✓ Capacity to manage a broad range of health care needs without relocating the resident.
- ✓ Size of personal living space
- ✓ Daily menu choices and food preparation preferences
- ✓ Quality of food
- ✓ Mealtime flexibility and food services options
- ✓ Ratio of staff to resident, staff trainings and certifications, staff turnover rate
- ✓ Housekeeping, laundry and linen services
- ✓ Fitness and wellness programs
- ✓ Educational programs and computer classes, resident in-room computer hook-up
- ✓ Safety features and security measures
- ✓ In-room resident-controlled heating and air-conditioning
- ✓ Transportation
- ✓ Residents allowed to bring their own furniture and personal belongings
- ✓ Availability of storage space
- ✓ Active resident and family member council
- ✓ Accessible outdoor area, outdoor activities
- ✓ Intergenerational activities
- ✓ On-site personal grooming services
- ✓ Personal assistants
- ✓ Shopping and errand assistance
- ✓ Assisted-living and caregiver options
- ✓ Mail management system and outgoing mail services
- ✓ Resident and Family Newsletter

- ✓ Religious and spiritual programs
- ✓ Ethnic and cultural activities
- ✓ Policies regarding smoking and alcohol consumption
- ✓ Pet policy
- ✓ Resident and family support groups on various topics

Assisted-living and skilled nursing care considerations

- ✓ Completed background checks on the staff
- ✓ Conducted research on formal complaints and law-suits filed against this facility
- ✓ I felt at ease, and was warmly greeted the moment I entered the building
- ✓ Staff and management have been accessible to me
- ✓ Staff and management have treated me respectfully, and I like and trust them
- ✓ I feel that this is a safe and caring environment
- ✓ Residents appear to be happy and well cared for
- ✓ This is a resident-centered environment; residents are given choices and offered a customized living environment
- ✓ Staff responded in a timely manner to residents' requests
- ✓ My elder's cultural and spiritual needs will be met here

Go the extra mile

- ✓ Give several housing options a test drive. Make reservations to eat several meals at the community. Arrange for your elder to stay the weekend.
- ✓ Get opinions on several housing options from trusted sources, such as a geriatric case manager, friends in similar situations, your elder's doctor.

- ✓ Conduct background checks on the financial stability of the community, rate increase history, the owner/developer's track record and any past complaints and lawsuits.
- ✓ Negotiate all costs and fees.
- ✓ Seek the advice of a financial planner to help create long-term financial and tax strategies and plans to pay future health care expenses.
- ✓ Review housing and care contracts with an attorney and financial planner before signing.