



Consumer Checklist

As you assess assisted living communities, you will likely visit a number of them. To help you determine the one that's right for you or your loved one, consider the following questions to evaluate each community based on your needs. Also ask the community if they're a member of OKALA. (I would like to create this checklist in a PDF for them to print out)

Assisted Living 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 of the Assisted Living Community

- 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, Assisted Living 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?
- 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.

Assisted Living Community 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 Assisted Living 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 or satellite 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?

Assisted Living 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 on Assisted Living

- 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?