

**ADULT-LIVING CHECKLIST**

**START HERE**

* If researching a care community, you may want to hire an independent patient advocate or case manager to accompany you on the tour.
* Consider whether the new location will be convenient for you and others to visit.
* Is a nursing home necessary or are there alternatives? If memory care is not offered, will your elder eventually need to move out? Discuss care options with the doctor.
* Transparency of operations has never been more important. Do not hesitate to ask for docu­ments.
* Do not sign any agreements without reviewing documents with an attorney.
* Do not sign any agreements that include arbitration clauses that waive the right to a court hearing in the event of conflicts.
* Before deciding where to live, ask about one- or two-week trial runs.

**DUE DILIGENCE RESOURCES**

* Check licenses, permits, accreditation, complaints, reputation, financials, and criminal records. The community care licensing division of your state’s department of social services will inform you of whether a facility has obtained proper licenses to conduct business.
* Read through online reviews and social media comments.
* Search online to find information about the owners. Who are they? How long have they been in business?
* Contact your state’s public health office and ombudsman office, your county’s public records, and the Better Business Bureau to review reports and any formal complaints that may have been filed.

**MONEY**

* What are the costs? What is not included in the monthly fee? Transportation? Cable TV? Internet?
* What are the “hidden” fees (catheters, bandages, lotions, continence products, etc.)?
* Is the building currently approved and licensed for Medicaid residents?
* Do you accept long-term care insurance?
* What happens if the resident’s money runs out? Are the adult children responsible for costs?
* Are fees refundable? Under what circumstances?
* Are there move-in and move-out fees?
* Who calculates care costs? What is the system for determining care costs?
* Have you ever filed for bankruptcy? Are you currently operating at a profit?
* How often do you increase rates? What percent? When was the last rate increase?
* Do you have anything in writing that defines what happens if you close your doors?
* Are there any move-in incentives or upcoming specials available?
* Which fees are negotiable?
* Can services be purchased “à la carte,” or are they all-inclusive?
* Are there cost adjustments for couples if one person is relocated to a health-care unit?
* Will you show me your financial statements? (Look for reserves, income, and cash flow.)

**STAFF**

* What are your staff qualifications and licenses?
* What’s the staffing level during the day versus at night and weekends?
* What is the staff-to-resident ratio?
* What is the availability of a medical doctor (MD)? A licensed practical nurse (LPN)? A regis­tered nurse (RN)?
* What is the staff turnover rate?
* What is the average length of staff employment?

**NURSING DIRECTOR QUESTIONS**

* What is the highest level of care offered?
* Can residents age in place when they need higher levels of care?
* Do you separate couples if one requires a higher level of care?
* Under what conditions do you move residents from room to room?
* Can residents hire their own caregivers?
* Who decides when a resident requires more care?
* What are the checks and balances to assure that everything is being done correctly?
* How many hours of care are you licensed to provide each resident?
* What hospital will a resident be taken to if care is needed?
* Tell me about your continence care program. How is your staff trained?
* How do you prevent pressure sores in this facility?
* Are you certified for the Montessori Inspired Lifestyle for memory care?
* What are the physical and chemical restraint and bed-rail policies?
* What is the process for observing advance medical directives and do-not-resuscitate (DNR) orders?

**LIFE PLAN COMMUNITY**

* What do you do with the entrance fee?
* What is your occupancy percentage? (Look for a 90 percent rate or more.)
* How will future expansion and refurbishing building plans affect costs?
* Do you have a home- and community-based services program?
* Do you have a future-residents club? What are the privileges of becoming a member?

**WELLNESS AND ACTIVITY DIRECTOR QUESTIONS**

* Do you have a gym on-site?
* Is the wellness program personalized for each participant?
* How does the wellness program allow opportunity for mastery (not just participation)?
* How many of the programs are resident-run?
* Do residents have a choice in when they can participate in programs?
* How do programs support social connections both within and beyond programs?
* What is offered in terms of intergenerational activities?
* Are customized menu options offered? Are there gluten-free or vegan options?
* How are residents’ cultural, spiritual, and emotional needs met?
* How do you connect with external influences (neighborhood initiatives)?

**EVACUATIONS, EVICTIONS, AND DISCHARGE**

* How long is an apartment held if a resident is hospitalized or sent to rehab?
* On what grounds can a resident be evicted?
* Is obesity grounds for eviction?
* Is running out of money grounds for eviction?
* What is your rehousing policy should there be a need to evacuate residents from the prem­ises?
* Are your eviction and discharge policies in writing? I would like to have a copy of this document.

**HOUSE RULES AND OPERATIONS**

* Is recreational and medicinal use of cannabis use allowed? Smoking? Alcohol consumption?
* What is the pet policy?
* What is your policy and privacy procedure about sex between two consenting adults?
* What is your anti-bullying policy? Are your antidiscrimination policies in writing? May I have a copy of these policies?
* Do you have an active resident and family council? Support groups?
* How are family members kept informed?
* How often do residents file theft reports?
* Is every room air conditioned?
* What is your weather- and fire-related disaster plan?
* What is your policy about residents having security cameras installed in their room?

**INFECTION CONTROL**

* As of today, how many people have died at your community from COVID-19?
* How do you protect residents and staff from COVID-19?
* Do you screen visitors for COVID-19? (If there is no screening process, take this housing option off your list.)
* What are your lockdown and quarantine policies and procedures?
* Under what circumstances do you prohibit visits from family member?
* Do you ban residents from leaving the property for outings with family and friends?

**ASK FOR WRITTEN DOCUMENTATION (SIGN NOTHING)**

* Financial statements and legal agreements
* General operating procedures
* Eviction policies and procedures
* Inspection reports
* Copy of their duties under the Nursing Home Reform Act

**ON-SITE OBSERVATIONS**

* Are you feeling at ease? Were you warmly greeted upon entering the building?
* How do the interior and exterior look? Is the building nicely maintained?
* When touring the interior, do you smell unusual odors?
* Do residents appear to be active and engaged? Are they well cared for?
* Do you see staff demonstrating safety and cleanliness?
* Ask residents about their experiences.
* Talk to visiting family members.