When you are looking for an assisted living community for yourself or a loved one, this checklist can help you evaluate whether a particular community meets your care needs and preferences.

**Name of Community**  
______________________________

### Moving In

- What does the moving in process entail?  
- What are the paperwork requirements and the time frames involved?  
- How is the initial assessment managed?  
- Who completes the assessment?

### Service Planning

- Are the family and the resident involved in the service planning process?  
- How often are residents’ needs assessed?  
- Who completes the assessment?  
- Are there special programs for memory-impaired residents and residents suffering with dementia?  
- Are there accommodations for memory-impaired residents to be outside and exercise?  
- How are emergency situations managed?  
- What is the protocol for such events?  
- What happens if the health care needs of a resident change?  
- Under what conditions are residents asked to move if there is a change in health status?
Services and Activities

Does staff assist residents in administration of medication? 

Does the residence use a particular pharmacy? 

If applicable, does that pharmacy participate in the individual's Medicare Part D prescription drug plan? 

Are there professional nursing services on-site? 

If not, does the staff assist residents and families in making arrangements through a home health agency? 

Are the services of a physical, occupational, or speech therapist available or arranged? 

Is transportation provided for medical appointments and recreational purposes? 

Is there a fee? 

Are there resident and family councils? How often do they meet? 

What are the suggestion, complaint, or grievance procedures? 

What recreational and spiritual activities are available? (Obtain or review a copy of the activities calendar.)

Staff

Ask about the residence's staffing patterns and philosophy about staffing. 

What training and qualifications are required for staff? 

Are there ongoing training programs provided for staff? 

Observe staff and resident interactions. Are they positive? Courteous?
Cost and Fees

What is included in the basic monthly cost? (Ask for a written copy.)

Does the residence have a written schedule of fees for extra services? (If so, request a copy.)

Under what circumstances might the fees change?

How much notice is given if there is a fee increase?

Is there a security deposit? What is the refund policy?

Can service agreements and/or contracts be amended or modified?

Dining and Food Services

Does the residence accommodate special diets?

Does a dietician or nutritionist review the menus? (Request or review copies.)

What are the criteria for residents to eat meals in their rooms?

Living Space and Accommodations

Are the resident rooms furnished or unfurnished?

What is the policy about personal belongings?

Are there patios and courtyards available for resident use? Is there an area for resident gardening?

Does the residence provide security?

Are pets allowed to reside in the residence?

If so, are there additional fees and/or deposits?

If not, are pets allowed to visit?
**Licensure and Certification**

Is the residence licensed? (Ask to review the last licensing/certification report.)

If the state requires the administrator to be licensed or certified, is it current?

Does the staff actively participate in trade or professional associations?

**Safety**

Does the residence have an emergency preparedness plan?

How are the emergency and evacuation plans reviewed with the resident after admission?

Does the residence have a fire sprinkler system throughout the residence?

Where are the smoke detectors located?

*Please use another sheet of paper if you need additional space to include all information.*