

Assisted Living Community – Administrative Checklist

Take this handy guide with you when you speak to the community relations or management staff. Asking the right questions upfront will help you make a more informed decision about the right assisted living community for you.

Community Information

Community Name:	Contact:
E-Mail:	Phone:

License & Certifications	Yes	No	Notes
What licenses does the community hold? List:			
Does the community have additional certifications or accreditations? (CARF) List:	<input type="checkbox"/>	<input type="checkbox"/>	
What certifications does the staff hold? List:			
Have you reviewed the last state inspection report?	<input type="checkbox"/>	<input type="checkbox"/>	
Have there been any stop placements within the last 3 years?	<input type="checkbox"/>	<input type="checkbox"/>	
Is staff provided with continuing education?	<input type="checkbox"/>	<input type="checkbox"/>	

Healthcare & Medication	Yes	No	Notes
Is there an on-call physician, nurse practitioner or physician’s assistant?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a written care plan for each resident?	<input type="checkbox"/>	<input type="checkbox"/>	
Can family, staff and the primary physician participate in designing the care plan?	<input type="checkbox"/>	<input type="checkbox"/>	
How often are resident needs re-assessed?	<input type="checkbox"/>	<input type="checkbox"/>	Timeframe:
Is self-administration of medication allowed?	<input type="checkbox"/>	<input type="checkbox"/>	
What is the policy for responding to a resident’s medical emergency?			
What is the policy on medication storage, dispensing and record keeping?			

Meals	Yes	No	Notes
Are special (low-sodium, low-sugar, ethnic) diets accommodated?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have input into meal planning?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have a choice of foods for each meal?	<input type="checkbox"/>	<input type="checkbox"/>	
Are healthy snacks available at all times?	<input type="checkbox"/>	<input type="checkbox"/>	
May residents have their meal in their apartment/room?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there special holiday meals where families can attend?	<input type="checkbox"/>	<input type="checkbox"/>	
Are the vegetables and meats purchased organically grown?	<input type="checkbox"/>	<input type="checkbox"/>	
What is the policy and cost for family members to eat with residents?			

Social, Cultural & Wellness Activities	Yes	No	Notes
Is there a monthly activities calendar published and posted?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the community have a volunteer program?	<input type="checkbox"/>	<input type="checkbox"/>	
Do the fitness offerings accommodate varying abilities?	<input type="checkbox"/>	<input type="checkbox"/>	
What are the fitness and exercise offerings? List:			
What social activities are offered? List:			

Personal Services (ADLs, special needs)	Yes	No	Notes
May the resident hire outside home care and/or home health providers to provide services within the assisted living community?	<input type="checkbox"/>	<input type="checkbox"/>	
What services are available?	<input type="checkbox"/>	<input type="checkbox"/>	
• Assistance with activities of daily living	<input type="checkbox"/>	<input type="checkbox"/>	
• Medication management	<input type="checkbox"/>	<input type="checkbox"/>	
• Foot care	<input type="checkbox"/>	<input type="checkbox"/>	
• Laundry service	<input type="checkbox"/>	<input type="checkbox"/>	
• Other services? List:			

Transportation	Yes	No	Notes
Is transportation available for specific appointments?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, what is the schedule?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there any limitations?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there guest parking?	<input type="checkbox"/>	<input type="checkbox"/>	

Pets	Yes	No	Notes
Are pets allowed?	<input type="checkbox"/>	<input type="checkbox"/>	
If so, what types?			
What is the pet deposit amount, if any?			
Are there provisions if the resident goes on vacation or has to be hospitalized?	<input type="checkbox"/>	<input type="checkbox"/>	

Security & Safety	Yes	No	Notes
Does staff undergo a background check? Which staff?	<input type="checkbox"/>	<input type="checkbox"/>	
What type? (driver's license, criminal, national or state)			
What policies are in place to protect the personal property of each resident?			

Length of Stay/Discharge	Notes
What is the average length of stay for residents?	
What conditions require the discharge or transfer of a resident?	

Policies & Cost	Notes
What are the contract options available?	
What are the entrance fees?	
What are the policies for refunding entrance or waiting list deposit fees?	
What is the pet deposit?	

Policies & Cost (cont.)	Notes
What services are included in the monthly rate? List:	
What additional fees are charged for care, services and supplies?	
What are the billing, payment and credit policies?	
What is the policy for fee increases?	
Under what conditions can a contract be terminated?	
Is insurance required to cover personal property and possessions?	
What is the policy if a resident is no longer able to pay with private funds and is Medicaid eligible?	
What programs are available to help cover the cost of services such as government, corporate, or private programs? (e.g., Veteran’s Administration, Life Settlement, Bridge loans)	