



## Consumer Checklist

The following is ALFA's consumer checklist of important services, amenities and accommodations in assisted living communities. Every community is unique. We recommend making several visits, at various times of day, to each residence you are considering.

Ask for written material. We recommend that all providers have a written statement or copies of their resident agreement outlining, at a minimum, services, prices, extra charges, admission and discharge criteria, staffing and house rules. A disclosure statement may also be available discussing ownership and the financial solvency of the provider. As you start your search, it is important to assess your needs as they are now and ask each provider how they might accommodate any changes over time. It also is important to examine your finances and ask about costs. Monthly rates and fee structures vary. Most of all, if you are seeking a residence for someone who cannot visit the residence personally, it is important to respect their needs and wishes by including them in the process as much as possible. The result will be their greater satisfaction. See below for important information to consider when assessing an assisted living residence. For additional information and to find a licensed assisted living residence that's right for you, please visit [ESAAL's Member Directory](#).

### Atmosphere

- \* As you arrive at the residence, do you like its location and outward appearance?
- \* As you enter the lobby and tour the residence, is the decor attractive and homelike?
- \* Did you receive a warm greeting from staff welcoming you to the residence?
- \* Does the administrator/staff call residents by name and interact warmly with them as you tour the residence?
- \* Do residents socialize with each other and appear happy and comfortable?
- \* Are you able to talk with residents about how they like the residence and staff?
- \* Do the residents seem to be appropriate housemates for you or your loved one?
- \* Are staff 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

- \* Is the community well-designed for resident's 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 hand rails 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 residence have good natural and artificial lighting?

- \* Is the residence clean, free of odors and appropriately heated/cooled?
- \* Does the residence meet local and/or state licensing requirements?
- \* Does the residence have sprinklers and clearly marked exits?
- \* Does the residence have a means of security if a resident wanders?

### **Needs Assessments, Contracts, Costs & Finances**

- \* Is a contractual agreement available that discloses health care and supportive services, all fees, as well as admission and discharge provisions?
- \* Is there a written plan for the care of each resident?
- \* Does the residence have a process for assessing a potential resident's need for services and are those needs addressed periodically?
- \* Does this process include the resident, their family and facility staff along with the potential resident's physician. \* When may a contract be terminated and what are refund policies?
- \* Are there any government, private or corporate programs available to help cover the cost of services to the resident?
- \* Is a contractual agreement available to include accommodations, personal care, health care and supportive services?
- \* Are additional services available if the resident's needs change?
- \* Is there a procedure to pay for additional services such as nursing care when the services are needed on a temporary basis?
- \* Are there different costs for various levels or categories of services?
- \* Do billing, payment and credit policies seem fair and reasonable?
- \* May residents handle their own finances with staff assistance, or should a family member or outside party be designated to do so?
- \* Are residents required to purchase renters' insurance for personal property in their units?
- \* Is staff available to meet scheduled and unscheduled needs?
- \* When may a contract be terminated? What are the policies for refunds and transfers?
- \* Is there an appeals process for dissatisfied residents?

### **Medication & Health Care**

- \* Does the residence 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 care visits from a nurse, physical therapist, occupational therapist, etc. if needed?
- \* Are staff members available to assist residents who experience memory, orientation or judgment losses?
- \* Does a physician or nurse visit the resident regularly to provide medical checkups?
- \* Does the residence have a clearly stated procedure for responding to a resident's medical emergency?
- \* To what extent are medical services available, and how are these services provided?

### **Services**

- \* Can the residence provide a list of 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, toileting and incontinence; using the telephone, shopping and laundry
- \* Does the residence provide housekeeping services in residents' units?
- \* Does the residence provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents?

- \* Can residents arrange for transportation on fairly short notice?
- \* Are pharmacy, barber/beautician and/or physical therapy services offered on-site?

### **Individual Unit Features**

- \* Do dining room menus vary from day to day and meal to meal?
- \* Are different sized and types of units available?
- \* Are units for single and double occupancy available?
- \* Do residents have their own lockable doors?
- \* Is a 24-hour emergency response system accessible from the unit?
- \* Are bathrooms private with handicapped accommodations for wheelchairs and walkers?
- \* Are residents able to bring their own furnishings for their unit and what may they bring? What is provided?
- \* Do all units have a telephone and cable TV and how is billing handled?
- \* Is a kitchen area/unit provided with a refrigerator, sink and cooking element?
- \* May residents keep food in their units?
- \* May residents smoke in their units, or in public spaces?
- \* May residents decorate their own units?

### **Social & Recreational Activities**

- \* Is there evidence of an organized activities program, such as a posted daily schedule, events in progress, reading materials, visitors, etc.?
- \* Do residents participate in activities outside of the residence in the neighboring community?
- \* Do volunteers, including family members, come into the residence to help with or conduct programs?
- \* Does the residence create a sense of community by requiring residents to participate in certain activities or perform simple chores for the group as a whole?
- \* Are residents' pets allowed in the residence? Who is responsible for their care?
- \* Does the residence have its own pets?

### **Food Service**

- \* Does the residence provide three nutritionally balanced meals a day, seven days a week?
- \* Are snacks available?
- \* May a resident request special foods?
- \* Are common dining areas available?
- \* May residents eat meals in their units?
- \* Are meals provided at a time a resident would like, or are there set times for meals?