

Facility Visit Checklist

For Assisted Living, Memory Care and Skilled Nursing

Consider the impact of the huge cost and Quality of life for the Family and the Resident. It is much more than smiles and fish tanks and decor. Remember there is no excuse for “forgot to mention” and what you didn’t expect.

1. Where

- a) Ease of Visiting for family
- b) Visit Policy, Times and dates

2. Fit in, Acceptance and Activities

- a) Ask to see an activities calendar.
- b) Are there interest clubs/groups (painting, exercise, bridge, etc ...)? Is there a cost to join? How many attend? How often do they meet?
- c) What is the ratio of men to women?

3. Staffing

- a) Medical Staff certs and training logs
- b) Care Staff certs and training logs
- c) Staff turn-over record, last 3 years

4. Facility Details

- a) Safety and Fire Inspection reports
- b) Is there a fire sprinkler system?
- c) Police incidents?
- d) Is there parking, is it covered or uncovered?
- e) State Quality Inspection reports available?
- f) Infection Control Policy and reports?
- g) County Food Service inspection reports.
- h) County Food Service inspection reports.
- i) Mental Health evaluation policy and triggers.
- j) Care plan staff meetings, who is included?
- k) What is the role of the facility Doctor?
- l) What happens if I need more care? Can I contract with any home health service? Is there assisted living, skilled nursing, and/or memory loss service available in the facility?
- m) CPR (Heart Attack) Unit locations in building.
- n) Do Not Resuscitate policy and rules
- o) Where is the closest hospital?
- p) What help is provided on-site in case of a fall?
- q) Is transportation provided for doctors appointments, shopping, travel, etc...?

r) Emergency Room visit criteria, decided by who?

s) Power Generator? Maintenance/adequacy of

5. Costs, Contracts and Considerations

a) Basic Cost per month

i. Is there a deposit and how much?

ii. How long is it kept

iii. Can I get all of it back if I leave? Will my estate get the whole deposit back if I pass?

b) What is included and what is not?

i. Is house cleaning provided? What is done and how often? What (if any) maintenance will the resident be responsible for? Laundry service policy?

ii. Are pets allowed? Is there a pet deposit?

iii. Can resident control air conditioning temperature for the unit?

c) What meals are included in my plan?

i. What do guest meals cost?

ii. When are meals served?

iii. Can I order meals delivered to my room? Is there a charge?

- iv. Can I take a doggy-bag of food from my meal back to my apartment?
- v. Can missed meal credits be used for guests? How long are the credits valid for?
- d) Extra charges for grooming, trips, etc...
- e) Is waiver of suit required? Arbitration only?
- f) History of cost increases (3 years)?
- g) Is there a cap on cost increases?
- h) Who does the Benefits paperwork?
- i) Who provides charge documentation to the Insurance Company?
- j) Can we get copies of what is charged?
- k) Are banking and fiduciary available on site?
- l) Renters and liability insurance required?
- m) Payment schedule and arrears policy.