

Assisted Living Checklist User Guide

All questions that appear in our checklists serve a purpose and help you gather the right information to make an informed decision about a provider. However, the implications associated with some of the questions may not be completely obvious. This user guide addresses those questions in particular; it is organized to match checklist categories.

Location questions:

Staying connected to family and friends is important to the well-being of the person considering a move to an assisted living community. Sometimes this gets overlooked. You may have to make a trade-off between accessibility and quality; quality is important—but not always more important than having regular visits from family and friends.

Building maintenance questions:

Building maintenance provides a window into management's commitment to community and the community's financial well-being; it should be considered as part of any provider evaluation.

With that, facility odors often indicate insufficient staff and/or poor care. If you notice or ask about odors, particularly of urine or feces, the facility may explain that there had been a recent accident; if so, you should visit another time to verify. There should not be ongoing odors if the facility is clean and incontinent residents are cared for properly.

Amenity questions:

Make sure to ask about the amenities listed in the checklist, as well as any others that are offered or important to you. Do not assume that an amenity exists without verification.

Service questions:

Make sure to ask about the services listed in the checklist. Again, do not assume that a service is available without verifying that it is.

Ask specifically about activities and outings. Remember that unless you or the person moving into the community is able to go out independently, these activities and outings are all that will be available to fill your day. The activities should be varied and appropriate to the level of functioning of residents. Ask to see a monthly calendar and attend an activity if possible. Make note of how many residents actually attend the activity. Ask residents if they enjoy the activities offered. And ask yourself: Would you enjoy these activities?

Care questions:

The three last questions in this section – those that relate to additional or stepped-up care over time – are important and often not asked. No one likes to think about future physical and mental decline. However, things happen, and it's important to know ahead of time if you would be allowed to hire a private caregiver to stay in your apartment if functioning declines, as well as what triggers lead to a move to a higher level of care within the community or a new facility entirely.

Current resident questions:

The best advertisement for any community is well cared for, happy, engaged residents. Along those lines, the way staff members interact with residents will tell you a lot.

For example, when staff know residents by name, it is a sign of respect and consistent, ongoing engagement – and generally associated with better care and happier residents. The use of ‘honey,’ ‘dearie’ and/or other generic names, unless invited to do so, is demeaning.

Resident councils are very important as well – and generally mean more accountability among staff and as such, better care. Councils provide a forum where residents can voice requests and complaints as a group.

Staffing questions:

Nurses, dietitians, social workers, activity directors and certified nursing assistants (CNAs) each bring important professional and paraprofessional expertise to assisted living communities. Here is an explanation of the types of healthcare professionals offered by some facilities – and what they do:

- A registered nurse provides healthcare and medication management.
- Licensed practical nurses have less formal education than registered nurses; they perform many nursing tasks but must work under the supervision of a nurse.
- A dietitian ensures that meals are nutritionally-sound and that residents who require special diets are accommodated.

- Social workers assess and address residents' social and psychological needs.
- An enthusiastic, involved activity director sees to it that residents have an interesting and robust schedule of activities and outings.
- CNAs provide hands-on personal care, such as bathing, grooming, dressing, assistance with incontinence care and help with maneuvering a wheelchair, if needed.

As an observer it is difficult to determine if there are enough staff to provide timely assistance for those who need help. As part of your evaluation, you should ask about the ratio of CNAs to the number of people needing physical assistance during the day, and at night, and ask residents if they have to wait a long time for help. Ask what happens if there is a health emergency, during the day or at night. Is there a nurse or doctor on the premises or on call?

Questions about the amount of time staff have worked at a community are important as well because stable staffing is typically a reflection of good management, which translates to better care for residents.

Exception: There are always exceptions. Sometimes stability is the result of tolerance of low standards and poor performance. A change in management and/or staff may represent efforts to correct such a problem. If you encounter a situation where major changes have occurred or are in process, you should probe further. Ask about prior problems, current goals and the corrective measures that new management is putting into place.

Contract & Cost questions:

Contracts are tedious to read and confusing to many of us. However, it is very important that you understand your contract, what your fee covers, what it does not,

the cost of services you may need to add and how terms of the contract may change. If you find this task difficult, ask an attorney to review the paperwork before signing. Make sure you understand the terms of the contract and are satisfied with the agreement. Never sign paperwork under pressure.

Licensure questions:

If the community you are considering is not licensed in a state that requires licensure—run. Similarly, if the community you are considering is not forthcoming about whether its license is in good standing—run.

Accreditation is voluntary – and generally, a sign of commitment to high standards and continuous quality improvement. When a facility goes this route, a third party, the accreditation organization, reviews all aspects of the community’s operations, including policies, procedures and protocols.

Summary:

Remember that you are looking for a home for yourself or your loved one. When you have completed your investigation, it is helpful to ask yourself the following six simple questions:

- Did you feel well treated when you visited the community?
- Was the staff forthcoming with information?
- Were your questions answered to your satisfaction?
- Did the residents look happy, well cared for and engaged with life?
- Does this community feel as if it could be your home or the home of your loved one?

- Would you or your loved one feel comfortable living with the staff and residents you saw?