
Making the grade worksheet: ASSISTED LIVING FACILITIES

This worksheet is designed to familiarize you with the types of services offered by assisted living facilities. Consider reviewing the guide in advance of your visit, and bring along a copy of this questionnaire to take notes and evaluate the community based on your impressions.

Assisted living facilities are designed for individuals who want to be as independent as possible, but may need help with some of the activities of daily living (ADLs).

Assisted living facilities provide social and community interaction and will monitor residents' activities to ensure health, safety and well-being. They do not provide 24-hour medical or skilled care. Instead, assistance with the ADLs is provided primarily by health aides and nurse's aides. Some assisted living facilities offer specialized round-the-clock supervision and therapeutic activities for residents suffering from dementia or cognitive impairment.

Medicare does not cover assisted living expenses; in some cases, Medicaid may provide for limited services. Some long-term care insurances will cover some of the costs, but this varies by policy. As each state has its own licensing requirements for assisted living, it is important to check to see what services can be provided.

Use this guide to assess the assisted living communities you are considering:

Community profile

| | | |
|-------------------|---------------------------------------|--------------|
| Name of community | | Date visited |
| Address | | Phone no. |
| City | State | Zip code |
| Contact name | Your rating 1–5 (5 being the highest) | |

Release from liability: Any selections the individual or family makes in terms of care are the sole responsibility of the decision maker. The Financial Advisor, Legg Mason, and The Center for Innovative Care in Aging at the Johns Hopkins University School of Nursing are held harmless and released from any liability that may occur from selecting a care center, caregiver, community or facility.

Community basics

Number of:

Residents (total) _____ Floor plans _____

Units (total) _____

Average length of stay _____

Setting (e.g., in-town, suburban, country) _____

Average age of the residents _____

Name of developer/sponsor _____

Is the sponsor for profit not-for-profit (Affiliated with: _____)

What is the financial position of the sponsor (request financial statement)? _____

Is there debt? If yes, how is it structured? Yes No

How many years has the community been in business? _____

What is the history of any parent company or sponsor? _____

Occupancy rate (%) _____

Is there a waiting list? Yes No

Cost to join the waiting list: _____

Is the cost refundable? Yes No

Length of waiting list: _____

How is the waiting list managed? _____

Location

Convenient to family? Yes No

Convenient to friends? Yes No

Convenient to shopping? Yes No

Convenient to medical care (e.g., doctors, specialists, hospitals, specialized rehabilitation facilities)? Yes No

Transportation

| | | |
|--|-----|----|
| Does the community offer transportation to shopping, doctors, etc.? | Yes | No |
| Is scheduled transportation or public transportation offered nearby? | Yes | No |

Community environment

| | | |
|--|-----|----|
| Does it feel welcoming? | Yes | No |
| Do the residents appear happy and engaged? | Yes | No |
| Does the facility appear clean? | Yes | No |
| Do you smell urine or strong deodorizers that may be covering up the smell of urine? | Yes | No |
| May residents bring personal items from home? | Yes | No |
| Is there a secured outside area for the residents to walk in? | Yes | No |
| Are pets allowed? Policies/rules/restrictions? | Yes | No |

Community services

| | | |
|---|-----|----|
| What types of services (e.g., activities, personal care, snacks, etc.) are available? | | |
| What kinds of meals are normally served, and when? | | |
| Can they provide for special dietary needs? | Yes | No |
| What type of help is available at meal time? | | |
| Is there a security system? | Yes | No |
| Is there an emergency response system? | Yes | No |
| Are there bed alarms? | Yes | No |

Health and medical care

Is there a written plan for the care of each resident and is there an ongoing process for assessing changing needs? Yes No

What type of health care and personal care services are available?

What is the protocol for contacting family members should issues arise?

Who is the contact when family members have questions about patient care?

How are emergencies handled after hours?

Is there an on-site pharmacy? Yes No

Are residents required to use the on-site pharmacy? Yes No

Is there someone on staff to help arrange doctor appointments? Yes No

Are there doctors on site on certain days? Which specialists? Yes No

What is the lead time to be seen by a doctor or specialist?

Is there a social worker on staff for help with care and resources, if needed? Yes No

What happens if there is a short-term need for hospitalization?

How often do residents return to the residence after a stay at rehab or hospital?

What level of care is provided in assisted living? For example, what health setbacks would surpass its capabilities?

What is the relationship between monthly costs and level of care?

What health setbacks or clinical needs would trigger a move to skilled nursing? (e.g., mobility, oxygen, dementia or cognitive impairment, need for in-house physician, need for nurse/medic on call, or need for other specialists)

Health and medical care (Continued)

What kind of medication assistance is available?

What options are available if you need more care?

Who makes the decision to move the resident to a higher level of care?

What happens if there is no unit/bed available in a higher level of care?

How much notice is given when a transition is necessary?

Who makes the final call about a long-term move?

Memory care

Does the facility have a special wing or floor for residents with dementia or cognitive impairment?

Yes No

What type of training has the staff received in caring for patients with dementia or cognitive impairment?

Who does the training?

How does the staff handle behaviors such as wandering and agitation?

What security measures are in place to keep residents with dementia or cognitive impairment from wandering out of the building?

Is the staff available 24 hours a day?

Yes No

Who makes the final call about a long-term move to memory care?

For facilities without specific memory care units, what training has the staff received to care for people with memory-related issues?

Who is the contact when the family has questions about patient care?

Activities and amenities

How are new residents welcomed to the community?

What types of activities and events (e.g., book clubs, bingo nights, holiday events, etc.) are offered?

What types of amenities (e.g., pool, fitness, dining, etc.) are offered?

Optional services:

| | | | |
|---------------|-------|-----------------------------------|-------|
| Housekeeping | _____ | Storage | _____ |
| Handyman | _____ | Visitor parking | _____ |
| Salon | _____ | Guest rooms for visiting families | _____ |
| Linen/Laundry | _____ | Other | _____ |

Staff

Is the staff available 24 hours a day? Yes No

Is the staff friendly, respectful and personable? Yes No

What is the ratio of staff to residents?

What is the staffing level on weekdays, weekends and evenings?

What is the staff turnover rate?

Management

Who determines the management of the community?

How is the management supervised?

What feedback mechanisms exist for residents and their families?

Contract and fees

What are the monthly fees and what is included?

What services are included in the care agreement/ service contract? (Ask to see the care agreement/service contract.)

If a service is not covered, what is the fee for that service?

Is there a different fee for memory care?

Yes No

By what percentage have the monthly fees increased over each of the last five years?

What happens if a resident can no longer cover their monthly fees?

What would make the facility discharge a resident?

What dispute procedures are in place?

Check with local regulatory agencies and the Better Business Bureau to confirm compliance and see if any complaints have been filed.
