

Touring Checklist: Assisted Living



When calling or visiting a prospective assisted living community, use this checklist to keep notes, compare communities, and get answers to important questions.

General Observations

- You are greeted and feel welcome
- Exits are clearly marked
- Plenty of indoor and outdoor common areas
- Areas are clean and odor-free
- Residents appear engaged and happy
- Residents appear well-groomed
- Bathrooms have accessibility features like handrails
- You're comfortable with the medical-emergency procedures
- Pet-friendly environment

Staffing

- A licensed nurse is on staff
- Staff are kind and caring to residents
- Staff call residents by name
- Staff are tenured
- Staff appear well-groomed
- Staff have experience with your specific care needs/diagnosis
- You're comfortable with the staff-to-resident ratio

What other certified or licensed professionals are on staff, and what are their hours?

Living Units

- Private bathroom in unit
- Natural lighting is good throughout the day
- Temperature is comfortable and controllable
- Emergency call system you feel comfortable with
- You'll receive an appropriate amount of privacy
- Who will have keys to your home?

Personal Services

- Care and service assessments done prior to admission
- Assistance with activities of daily living
- Additional services available if needs change
- Outside care provider visits are coordinated
- Meals are nutritious and appealing
- Dietary accommodations are offered
- Interesting on-site and off-site activities and events
- Residents are enthusiastic about the activity schedule
- Staff-coordinated transportation is available
- Housekeeping, laundry, and linen services

What unique therapies or services are offered?

Who coordinates activities (staff, residents, or both)?

Finances

- Requirements for renter's insurance are clear
- There is an appeal process for dissatisfied residents
- Monthly price breakdown is clear
- All additional fees are mentioned

What sort of pricing incentives, move-in specials, or other financial programs are available?

Notes: _____

Touring Checklist: Independent Living



When calling or visiting a prospective independent living community, use this checklist to keep notes, compare communities, and get answers to important questions.

General Observations

- You are greeted and feel welcome
- Exits are clearly marked
- Available indoor and outdoor common areas
- Areas are clean and odor-free
- Residents seem to enjoy the community
- You're comfortable with the emergency procedures
- Pet-friendly environment

Staffing

- Staff are on-site
- Staff are polite to residents
- Staff appear well-groomed

What types of staff are on-site, and what are their hours?

Personal Services

- Meal services available with appealing options
- Dietary accommodations are offered
- Interesting on-site and off-site activities and events
- Staff-coordinated transportation is available
- Housekeeping, laundry, and linen services

What third-party services are offered?

Who coordinates activities (staff, residents, or both)?

Living Units

- Private bathroom in unit
- Bathroom has accessibility features like handrails
- Natural lighting is good throughout the day
- Temperature is comfortable and controllable
- Emergency call system you feel comfortable with

Who will have keys to your home?

Finances

- Requirements for renter's insurance are clear
- There is an appeal process for dissatisfied residents
- Monthly price breakdown is clear
- All additional fees are mentioned

What sort of pricing incentives, move-in specials, or other financial programs are available?

How long is the wait-list, and how are availabilities awarded? Is it first come, first served?

Notes: _____

Touring Checklist: Memory Care



When calling or visiting a prospective memory care community, use this checklist to keep notes, compare communities, and get answers to important questions.

General Observations

- You're greeted and feel welcome
- All exits and entrances are secured/supervised
- Easy-to-navigate indoor and outdoor common areas
- Outdoor areas are secured to prevent wandering
- Areas are clean and odor-free
- Residents appear engaged and content
- Residents appear well-groomed
- Bathrooms have accessibility features like handrails
- Pet-friendly environment
- You're comfortable with the medical-emergency procedures

Staffing

- Staff are licensed or certified
 - Staff are kind and caring to residents
 - Staff call residents by name
 - Staff are tenured
 - Staff appear well-groomed
 - You're comfortable with the staff-to-resident ratio
 - What specialized training in memory care do staff receive? Methods used for de-escalation?
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Living Units

- Natural lighting is good throughout the day
 - Temperature is comfortable
 - Emergency call system you feel comfortable with
 - The right balance of privacy and safety
 - Who will have keys to the unit?
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Personal Services

- Ongoing care assessments beginning upon admission
 - Assistance with activities of daily living
 - Outside care provider visits are coordinated
 - Meals are nutritious and appealing
 - Special dietary accommodations are provided
 - Person-centered care
 - Transportation assistance is available
 - Housekeeping, laundry, and linen services
 - What specialized memory care therapies or services are offered?
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What specialized activities/events are available for residents with various stages of memory loss?

Finances

- Requirements for renter's insurance are clear
- There is an appeal process for dissatisfied residents
- Monthly price breakdown is clear
- All additional fees are mentioned

What sort of pricing incentives, move-in specials, or other financial programs are available?

How long is the wait-list, and how are availabilities awarded? Is it first come, first served?

Touring Checklist: Senior Living



When calling or visiting a prospective senior living community, use this checklist to keep notes, compare communities, and get answers to important questions.

General Observations

- You are greeted and feel welcome
- Exits are clearly marked
- Plenty of indoor and outdoor common areas
- Areas are clean and odor-free
- Residents appear engaged and happy
- Residents appear well-groomed
- Bathrooms have accessibility features like handrails
- You're comfortable with the medical-emergency procedures
- Pet-friendly environment

Staffing

- A licensed nurse is on staff
- Staff are kind and caring to residents
- Staff call residents by name
- Staff are tenured
- Staff appear well-groomed
- Staff have experience with your specific care needs/diagnosis
- You're comfortable with the staff-to-resident ratio

What other certified or licensed professionals are on staff, and what are their hours?

Living Units

- Private bathroom in unit
 - Natural lighting is good throughout the day
 - Temperature is comfortable and controllable
 - Emergency call system you feel comfortable with
 - You'll receive an appropriate amount of privacy
 - Who will have keys to your home?
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Personal Services

- Care and service assessments done prior to admission
- Assistance with activities of daily living
- Additional services available if needs change
- Outside care provider visits are coordinated
- Meals are nutritious and appealing
- Dietary accommodations are offered
- Interesting on-site and off-site activities and events
- Residents are enthusiastic about the activity schedule
- Staff-coordinated transportation is available
- Housekeeping, laundry, and linen services

What unique therapies or services are offered?

Who coordinates activities (staff, residents, or both)?

Finances

- Requirements for renter's insurance are clear
- There is an appeal process for dissatisfied residents
- Monthly price breakdown is clear
- All additional fees are mentioned

What sort of pricing incentives, move-in specials, or other financial programs are available?

How long is the wait-list, and how are availabilities awarded? Is it first come, first served?
