Senior Living Checklist

As you and your parent or family member consider potential senior living communities, use this helpful document to guide conversations, make notes and stay organized.

| Community | Phone number |
|--|--------------|
| Contact Address | |
| Parent's must-haves | |
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| | |
| First impression and tour | |
| Surroundings | Notes |
| The grounds, landscaping and building exterior are well-maintained | |
| The community is clean, attractive and odor-free | |
| There are walking paths and outdoor spaces to enjoy | |
| You can easily picture your parent living here | |
| Residents | |
| Residents are gathered throughout common areas and participating in activities | |
| Residents appear happy and engaged | |
| Staff | |
| You were warmly greeted immediately upon entering | |
| Staff is friendly, professional and knowledgeable | |
| Staff is kind to residents and knows their names | |
| What types of training do employees receive? | |
| What is the average length of employee and management tenure? | |

Amenities and services

Personal care

| 24-hour assistance with | bathing, | grooming |
|-------------------------|----------|----------|
| and getting dressed | | |

Customizable care for chronic and/or progressive conditions

Incontinence management

- Mealtime assistance
- Medication assistance
- On-site physical or occupational therapy
- Staff has experience with health conditions such as

Community services and amenities

- 24-hour staff and security
- Calendar of events
- Dining (quality and variety, three meals per day, accommodations for special diets, etc.)
- Elevator
- Fitness center
- Housekeeping and linen services
- Laundry facilities
- Licensed nurse and/or physician on-site
- Religious services/observances
- Salon and barber shop
- Transportation

Other:

Other:

| Notes | | |
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Costs and financials

| Monthly rent | \$ | Notes |
|---|---------------------------------|-------|
| Buy-in fee | \$ | |
| Security deposit | \$ | |
| Second resident fee | \$ | |
| Pet fee | \$ | |
| Recurring monthly fees (meals, etc.) | \$ | |
| Other: | | |
| | \$ | |
| Length of lease | ○ Long-term ○ Month-to-month | |
| What are the billing and payment options? | | |
| Do fees change? If so, how often? | | |

Other considerations

| The community has a quality assurance program |
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The community has a plan for natural disasters and other emergencies

The community has a waiting list

How does the community help older adults make the transition to their new home?

Is there a move-out policy?

How close is the nearest hospital?

What aspects of the community or tour stood out the most?

What are your thoughts, feelings and observations after your visit? Was your overall impression positive or negative?

Rate the community from 1-10: _



| Notes | | |
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