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Services and information for older adults and adults with disabilities  
in Wake County, North Carolina

## LONG-TERM CARE FACILITY CHECKLIST

If you will be visiting multiple facilities, which is strongly recommended, **make copies of this page so that you may take notes about each facility.**

Name of place: \_\_\_\_\_

### First Impressions

- Do you like the facility's outward appearance? \_\_\_\_\_
- Is the location convenient for visits by family and friends? \_\_\_\_\_
- Is the residence clean and free of odors? \_\_\_\_\_
- Is the facility appropriately heated/cooled? \_\_\_\_\_
- What is the noise level in the facility? \_\_\_\_\_
- Does the staff address residents by their names and interact with them during your tour? \_\_\_\_\_  
\_\_\_\_\_
- Do you notice the residents socializing with each other and do they appear content? \_\_\_\_\_  
\_\_\_\_\_
- Can you talk with residents about how they like living there and about the staff? What do they say? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are staff members courteous to residents and to each other? \_\_\_\_\_
- Do staff respond to requests for assistance in a timely manner? \_\_\_\_\_
- Are visits with residents encouraged and welcome at any time? \_\_\_\_\_
- Is the floor plan of the common areas well-designed and easy to follow? \_\_\_\_\_

### Living Area and Accommodations

- How many units are there, and how many are occupied? \_\_\_\_\_
- Are there different sizes and types of units available with optional floor plans? \_\_\_\_\_  
\_\_\_\_\_
- Are single units available? Are double occupancy units available for sharing with another person? \_\_\_\_\_  
\_\_\_\_\_

- What furniture is provided and what can residents bring from home? \_\_\_\_\_  
\_\_\_\_\_
- May residents decorate their own rooms? \_\_\_\_\_
- Is there adequate storage space in the individual units? \_\_\_\_\_
- Are the common areas attractive, comfortable and clean? \_\_\_\_\_  
\_\_\_\_\_
- Is there an outside courtyard or patio for residents and visitors? \_\_\_\_\_
- What laundry services or facilities are available for residents' personal clothing? \_\_\_\_\_  
\_\_\_\_\_

<b>Safety and Accessibility</b>
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- Are doorways, hallways and rooms accessible to wheelchairs and walkers? \_\_\_\_\_
- Are bathrooms accessible for wheelchairs and walkers? \_\_\_\_\_
- Are elevators available for those unable to use stairways? \_\_\_\_\_
- Are there handrails in the hallways to aid in walking? \_\_\_\_\_
- Are floors of a non-skid material and carpets conducive to safe walking? \_\_\_\_\_
- Does the residence have good lighting, sprinklers and clearly-marked exits? \_\_\_\_\_
- Does the residence provide ample security and is there an emergency evacuation plan? \_\_\_\_\_  
\_\_\_\_\_
- Is a 24-hour emergency response system installed in each unit? What happens when it is activated? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<b>Services</b>
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- What services are available to all residents at the base rate? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are there additional charges for personal care services (help with bathing, dressing, etc)? Who provides these services and what are their qualifications? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are housekeeping, linen service and personal laundry included in the fees, or are they available at an additional charge? \_\_\_\_\_  
\_\_\_\_\_
- Does the facility offer any special services or areas for dementia patients? How do these services differ from the usual? Is there an additional charge for these? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- To what extent are medical services available within the facility, and how are these services provided? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- How are medical emergencies handled? Does the residence have a clearly-stated procedure for responding to medical emergencies? Is there an arrangement with a nearby hospital? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is there a staff person to coordinate home care visits from a nurse, physical or occupational therapist, etc., when needed on a temporary basis? \_\_\_\_\_  
\_\_\_\_\_
- Does the facility provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents? If so, how is that arranged? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are pharmacy, barber/beautician and/or physical therapy services offered on-site or nearby? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<b>Social and Recreational Activities</b>
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- What kinds of group/individual recreational activities, if any, are offered? Who schedules them? Can you meet her/him? \_\_\_\_\_  
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\_\_\_\_\_
- Is there an organized activities program with a posted daily schedule of events? \_\_\_\_\_  
\_\_\_\_\_
- Does the facility schedule trips or other events off-premises? \_\_\_\_\_  
\_\_\_\_\_
- Are the social and activity areas appropriate and desirable to the prospective resident? \_\_\_\_\_  
\_\_\_\_\_
- Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening supplies)? \_\_\_\_\_  
\_\_\_\_\_
- Are religious services held on the premises or are arrangements made for residents to attend nearby services? \_\_\_\_\_  
\_\_\_\_\_
- Are there fitness facilities? What about regularly-scheduled exercise classes? \_\_\_\_\_  
\_\_\_\_\_

- Are residents' pets allowed? Does the facility have pets, and if so who cares for them? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Food**

- Does the residence provide meals? If so, how many times a day, how many days a week, and how does the menu vary from meal to meal? Can you look at a menu? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Can special diets be accommodated? Does a qualified dietitian plan or approve menus? \_\_\_\_\_  
 \_\_\_\_\_
- Are residents involved in menu planning and may they request specific foods? \_\_\_\_\_  
 \_\_\_\_\_
- Does the dining room environment encourage residents to relax, socialize, and enjoy their food? \_\_\_\_\_  
 \_\_\_\_\_
- May residents eat meals in their units? May they keep snacks or other food in their units? \_\_\_\_\_  
 \_\_\_\_\_
- Are meals provided only at set times or is there some flexibility? Are snacks available? \_\_\_\_\_  
 \_\_\_\_\_
- Can residents have guests dine with them for an additional fee? Is there a private dining room for special events and occasions, if desired? \_\_\_\_\_
- Can you tour the facility during a meal and eat with the residents? \_\_\_\_\_
- What do residents say about the food? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Moving In, Contracts, and Finances**

- Is there a waiting list? If so, how long do they estimate it will be for a unit to become available? \_\_\_\_\_  
 \_\_\_\_\_
- What is involved with the moving in/out process? \_\_\_\_\_  
 \_\_\_\_\_
- Is there a written statement of residents' rights and responsibilities? Can you take home a copy? \_\_\_\_\_
- Does the contract clearly disclose all fees for healthcare, accommodations, personal care, supportive services, as well as admission and discharge provisions? \_\_\_\_\_  
 \_\_\_\_\_
- How much is the monthly fee? What does this include? \_\_\_\_\_  
 \_\_\_\_\_

- How often can fees be increased and for what reasons? Is there a limit on the amount of increase per year? What is the history of monthly fee increases? \_\_\_\_\_  
\_\_\_\_\_
- Are residents required to purchase renters' insurance for personal property in their units? \_\_\_\_\_  
\_\_\_\_\_
- Do billing, payment and credit policies seem fair and reasonable? \_\_\_\_\_
- Is prepayment, a deposit, or an entrance fee required? Is any of that refundable? \_\_\_\_\_
- May the resident handle her/his own finances with staff assistance, if able, or must a family member/outside party be designated? \_\_\_\_\_  
\_\_\_\_\_
- Is the contract for a specific period of time or month-to-month? \_\_\_\_\_
- When may a contract be terminated and what are the policies for refunds and transfers? \_\_\_\_\_  
\_\_\_\_\_
- What happens if funds are depleted and full payment can no longer be made? \_\_\_\_\_  
\_\_\_\_\_
- Does the facility accept Medicaid? What about Special Assistance? \_\_\_\_\_
- What additional services are available if the resident's needs change? Is staff available to coordinate these services? \_\_\_\_\_  
\_\_\_\_\_
- Is there a procedure to pay for additional services such as skilled nursing care or physical therapy when the services are needed on a temporary basis? \_\_\_\_\_
- Under what circumstances would the resident be forced to move out (because of increased care needs, change in finances, etc.)? \_\_\_\_\_  
\_\_\_\_\_
- What happens if the resident needs to be hospitalized temporarily? How long can the facility hold a room for the resident, and what would it cost to do that? \_\_\_\_\_  
\_\_\_\_\_

<b>Staff</b>
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- What are the hiring procedures and requirements for eligibility? \_\_\_\_\_  
\_\_\_\_\_
- Are criminal background checks, references, and certifications required? \_\_\_\_\_  
\_\_\_\_\_
- Is there a staff training program in place and what does it entail? \_\_\_\_\_  
\_\_\_\_\_
- What is the staff turnover rate for patient care aides? What does the facility do to encourage staff to stay? \_\_\_\_\_  
\_\_\_\_\_
- How long has the current administrator been there? \_\_\_\_\_

- What is the staff-to-patient ratio during the day? At night? On weekends? \_\_\_\_\_  
\_\_\_\_\_
- Does the facility have RNs on duty at all times? LPNs? \_\_\_\_\_  
\_\_\_\_\_

**Licensure and Certification**

- Does the facility have a current license displayed? \_\_\_\_\_
- If the state requires the administrator to be licensed/certified, does she/he have a current license? \_\_\_\_\_  
\_\_\_\_\_
- What reputation does the facility have in the community? \_\_\_\_\_  
\_\_\_\_\_

**Complaints and Problem-Solving**

- Is the administrator, or other appropriate staff person, generally available to answer questions or discuss problems and would you be comfortable dealing with them on a daily basis? \_\_\_\_\_  
\_\_\_\_\_
- Is there a resident council or organization through which residents have a means of voicing their views? \_\_\_\_\_
- What is the procedure for handling resident or family concerns? \_\_\_\_\_  
\_\_\_\_\_
- Is there an appeals process for dissatisfied residents? \_\_\_\_\_
- Has the facility experienced any complaints or corrective actions? Are they willing to discuss past problems and how they were resolved? \_\_\_\_\_  
\_\_\_\_\_
- Has the facility ever been sanctioned or fined, or had its Medicare/Medicaid certification suspended? \_\_\_\_\_  
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Source: Adapted from [www.carepathways.com](http://www.carepathways.com)

**OTHER NOTES**

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