

**LONG-TERM CARE FACILITY CHECKLIST**

If you will be visiting multiple facilities, make several copies of this form so you can use one at each place.

Facility Name: \_\_\_\_\_

**First Impressions**

- \_\_\_\_\_ Do you like the facility's outward appearance?
- \_\_\_\_\_ Is the location convenient for visits by family and friends?
- \_\_\_\_\_ Is the residence clean, free of odors and appropriately heated/cooled?
- \_\_\_\_\_ 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?
- \_\_\_\_\_ Are staff members courteous to residents and to each other?
- \_\_\_\_\_ Do staff respond to requests for assistance in a timely way?
- \_\_\_\_\_ Are visits with the residents encouraged and welcome at any time?
- \_\_\_\_\_ How many of the units are occupied?
- \_\_\_\_\_ What is the noise level in the facility?

**Living Area and Accommodations**

- \_\_\_\_\_ Is the floor plan well-designed and easy to follow?
- \_\_\_\_\_ Are there different sizes and types of units available with optional floor plans?
- \_\_\_\_\_ Are single units available and/or double occupancy units 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?
- \_\_\_\_\_ May residents smoke in their units or are there designated public areas?
- \_\_\_\_\_ What laundry services or facilities are available for residents' personal clothing?

**Safety and Accessibility**

- \_\_\_\_\_ 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?

# long-term care facility checklist

## Services

- \_\_\_\_\_ What services are available to all residents at the base rate?
- \_\_\_\_\_ Are there additional charges for personal care services? 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 residence provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents and how is it arranged?
- \_\_\_\_\_ Are pharmacy, barber/beautician and/or physical therapy services offered on-site or nearby?

## Social and Recreational Activities

- \_\_\_\_\_ What kinds of group/individual recreational activities, if any, are offered? Who schedules them?
- \_\_\_\_\_ Is there an organized activities program with a posted daily schedule of events?
- \_\_\_\_\_ Does the facility schedule trips or go to other events off-premises?
- \_\_\_\_\_ Are the resident social and activity areas appropriate and desirable to the prospective resident?
- \_\_\_\_\_ Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening)?
- \_\_\_\_\_ Are religious services held on the premises or are arrangements made for residents to attend nearby services?
- \_\_\_\_\_ Are there fitness facilities? Regularly-scheduled exercise classes?
- \_\_\_\_\_ Are residents' pets allowed? Does facility have pets and 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? Are menus posted?
- \_\_\_\_\_ 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 visit 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?
- \_\_\_\_\_ 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 resident handle his/her 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? Special Assistance for Adults?
- \_\_\_\_\_ 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 needs for care?
- \_\_\_\_\_ 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?

## Staff

- \_\_\_\_\_ 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?
- \_\_\_\_\_ How long has it been in business? Is it in good financial health?

