

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?

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?

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?

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?
-

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?
