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Assisted Living Facility Evaluation Checklist

A Practical 10-Point Guide for Older Adults, Families & Caregivers

Why This Checklist Matters

Choosing an assisted living community is a decision that is both practical and emotional. This checklist is designed to provide crucial information and support **informed, thoughtful comparisons**, well beyond brochures and tours.

1. Physical Plant & Environment

- How old is the facility? When was it last renovated?
 - Is the building clean, odor-free, and well-maintained?
 - Does it have an air filtration system?
 - Are hallways, common areas, and apartments accessible, well-lit, and safe?
 - How many apartments/units are in the community?
 - What apartment types are available?
 - Studio
 - One-bedroom
 - Suite
 - Shared or companion suite
 - Are apartments furnished? What is included?
 - Can residents bring personal furniture and belongings?
 - Are safety features in place (grab bars, call systems)?
 - Is there a secure **Memory Care Unit**, if needed?
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2. Admission Requirements

- Are there income or financial eligibility requirements?
- Is an appropriate apartment currently available?
- What is the admission evaluation process?



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- Who conducts it?
 - Where does it take place?
 - How long does approval take?
- What are the criteria for Memory Care admission, if applicable?
- What documentation is required?
- Resident's Identification and Insurance
 - Government issued photo ID
 - Medicare card
 - Medicaid card, if applicable
 - Family/Responsible Party/Guardian Documentation
 - Durable Power of Attorney
 - Court Order appointing a Guardian (Co-Guardians), if applicable
 - Physician Paperwork – NYS Form 3122 (must be completed by a licensed physician, nurse practitioner, or hospital medical staff)
 - Hospital Discharge Paperwork and/or Test Results, if applicable
 - Tuberculosis (TB) Screening
 - Medication list and pharmacy information
 - List of allergies
 - Current, fully executed Advance Directives (Health Care Proxy (HCP), Living Will, Medical Order for Life Sustaining Treatment (MOLST – DOH-5003), Do Not Resuscitate (DNR), Do Not Intubate (DNI)
- Is a deposit required?
- Amount
 - Refundability and conditions
- How are monthly fees paid?



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- Private Pay
 - Medicaid (now or future eligibility)
 - Long-Term Care Insurance
 - Electronic payment required?
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3. Financial and Administrative

- Admission Agreement/Residency Contract
 - Authorization to release medical information (HIPAA)
 - Authorization for administration of medications
 - Fee Schedule - What is the base monthly rate?
 - What services are included in that rate?
 - Are there tiered care levels or added service fees?
 - How often do rates increase?
 - What services cost extra (continence care, escorts, supervision)?
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4. Staffing & Care

- Resident-to-staff ratio (day, evening, overnight)
 - Is there a physician on staff (day, evening, overnight)?
 - Is licensed nursing staff on site?
 - 24/7
 - On-call
 - Staff training (dementia care, fall prevention, medication support)
 - Languages spoken by staff
 - Staff turnover rate
 - Do staff members appear professional, respectful, and engaged?
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5. Services & Amenities

- Assistance with activities of daily living (ADLs)
 - Medication reminders or administration
 - Housekeeping and laundry
 - Meals and dietary accommodations
 - Transportation for medical appointments and outings
 - On-site salon, fitness, or wellness services
 - Outdoor spaces and walking areas
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6. Social Engagement & Quality of Life

- Variety of social and recreational activities
 - Cognitive and memory-supportive programming
 - Opportunities for family involvement
 - Religious or spiritual services
 - Resident councils or feedback opportunities
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7. Health & Emergency Planning

- What happens if a resident becomes ill?
 - How are medical emergencies handled?
 - Facility's relationship with local hospitals and EMS
 - Emergency preparedness plans:
 - Fire
 - Flood
 - Power outages
 - Evacuation procedures
 - How and when are families notified?
 - Emergency Contact(s) and contact details
 - Preferred hospital
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8. Safety & Security

- Secured entrances and exits
 - Wander-prevention systems (Memory Care)
 - Emergency call systems in apartments and bathrooms
 - State licensing and inspection history available for review
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9. Visiting & Family Involvement

- Visiting hours and flexibility
 - Guest and overnight policies
 - Communication practices with families
 - Frequency of care plan meetings and reassessments
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10. Planning for the Future

- Can residents age in place as care needs increase?
 - What happens if care needs exceed facility capabilities?
 - Hospice or palliative care coordination available?
 - Discharge and transition policies clearly defined?
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