Senior Living Tour Checklist

Use one copy for each community you visit, and ask the same questions on every tour. Write the answers beside each item. One tour is only one data point: check what you were told before you decide.

Community basics and license

Community name _____

Tour date _____

Address _____

Contact person: name, phone _____

Type of setting _____

Licensed as, in this state _____

Care

- ☐ Levels of care offered _____
- ☐ Who assesses needs, and how often _____
- ☐ What happens if needs increase _____
- ☐ Who gives medications; nurse hours _____
- ☐ Approach to memory loss, if needed _____
- ☐ Response to a fall or illness, any hour _____

Staffing

- ☐ Staff on each shift, nights and weekends _____
- ☐ Community staff, or agency staff _____
- ☐ Turnover; director's time here _____
- ☐ Who to reach evenings and weekends _____

Daily life and accessibility

- ☐ Meals and special diets; a meal tried _____
- ☐ Transportation, and what it costs _____
- ☐ Walker and wheelchair access _____

Safety and communication

- [ ] Emergency and evacuation plans _____
- [ ] Wandering and security _____
- [ ] How families are told; visiting rules _____

Costs and fees

- [ ] Monthly charge, and what it includes _____
- [ ] Costs that are extra _____
- [ ] One-time fees; any refundable _____
- [ ] How and when charges increase _____
- [ ] Notice and charges to move out _____

Documents to ask for and take home

- [ ] The contract and every fee schedule
- [ ] A written estimate, if the resident has been assessed
- [ ] The license, and the agency that issued it
- [ ] This month's activity calendar

Verify what you were told

- [ ] License confirmed with the state licensing agency
- [ ] Inspection or survey records reviewed, where available
- [ ] Long-term care ombudsman information checked, if useful
- [ ] Nursing homes: Medicare Care Compare checked

Notes

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Product use and limitations

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