1110 Navaho Drive, Fourth Floor, Raleigh, NC 27609 (919) 872-7933  [www.resourcesforseniors.com](http://www.resourcesforseniors.com/)

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? \_\_\_\_

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* Do you notice the residents socializing with each other and do they appear content? \_\_\_\_\_\_\_\_

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* Can you talk with residents about how they like living there and about the staff? What do they say? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_

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* Are single units available? Are double occupancy units available for sharing with another person? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* What furniture is provided and what can residents bring from home? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* May residents decorate their own rooms? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Is there adequate storage space in the individual units? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Are the common areas attractive, comfortable and clean? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Is there an outside courtyard or patio for residents and visitors? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What laundry services or facilities are available for residents’ personal clothing? \_\_\_\_\_\_\_\_\_\_

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**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?\_\_\_\_\_\_

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* Is a 24-hour emergency response system installed in each unit? What happens when it is activated? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Services**

* What services are available to all residents at the base rate? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are there additional charges for personal care services (help with bathing, dressing, etc)? Who provides these services and what are their qualifications? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are housekeeping, linen service and personal laundry included in the fees, or are they available at an additional charge? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* To what extent are medical services available within the facility, and how are these services provided? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_

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* Is there a staff person to coordinate home care visits from a nurse, physical or occupational therapist, etc., when needed on a temporary basis? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Does the facility provide transportation to doctors’ offices, the hairdresser, shopping and other activities desired by residents? If so, how is that arranged? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are pharmacy, barber/beautician and/or physical therapy services offered on-site or nearby? \_

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**Social and Recreational Activities**

* 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? \_\_\_\_\_\_\_\_\_\_\_

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* Does the facility schedule trips or other events off-premises? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are the social and activity areas appropriate and desirable to the prospective resident? \_\_\_\_\_\_

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* Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening supplies)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are religious services held on the premises or are arrangements made for residents to attend nearby services? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are there fitness facilities? What about regularly-scheduled exercise classes? \_\_\_\_\_\_\_\_\_\_\_\_\_

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

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**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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Can special diets be accommodated? Does a qualified dietitian plan or approve menus? \_\_\_\_\_

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* Are residents involved in menu planning and may they request specific foods? \_\_\_\_\_\_\_\_\_\_\_\_

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* Does the dining room environment encourage residents to relax, socialize, and enjoy their food? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* May residents eat meals in their units? May they keep snacks or other food in their units? \_\_\_

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* Are meals provided only at set times or is there some flexibility? Are snacks available? \_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* What is involved with the moving in/out process? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* How much is the monthly fee? What does this include? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are residents required to purchase renters’ insurance for personal property in their units? \_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_

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* What happens if funds are depleted and full payment can no longer be made? \_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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.)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Staff**

* What are the hiring procedures and requirements for eligibility? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Are criminal background checks, references, and certifications required? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Is there a staff training program in place and what does it entail? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* What is the staff turnover rate for patient care aides? What does the facility do to encourage staff to stay? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* How long has the current administrator been there? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What is the staff-to-patient ratio during the day? At night? On weekends? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Does the facility have RNs on duty at all times? LPNs? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* What reputation does the facility have in the community? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**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? \_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* 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? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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* Has the facility ever been sanctioned or fined, or had its Medicare/Medicaid certification suspended? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Source: Adapted from w[ww.c arepathways.c om](http://www.carepathways.com/)

**OTHER NOTES**