



Choosing a nursing home for a family member can be one of the most difficult decisions anyone has to make. The following considerations should help in the selection of the best facility. (Make several copies of this checklist and fill one out for each nursing home you are considering.)

## Nursing home checklist

Nursing home: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Contact: \_\_\_\_\_

### Credentials and overall environment

Is the facility certified by Medicare and Medicaid? Yes No

How long has the facility been certified? \_\_\_\_\_

Has the facility had stable ownership for some time, with the same administrator and director? Yes No

Is a statement of residents' rights clearly posted? Yes No

Does the facility have an Alzheimer's unit or other special-care area restricted to residents with special-care needs? Yes No

Is this specialty unit separated from other areas of the facility? Yes No

Is the facility well lit, clean, safe, and welcoming? Yes No

*continued*

### Key points

- Assisted-care living facilities are designed to be a middle ground between living at home and staying at a nursing home.
- Continuing care retirement communities (CCRCs) combine a variety of residential options under one "roof" — from independent housing to assisted living to 24-hour nursing services.
- When touring a facility ask thorough questions to understand all fees and the level of care delivered.

NOT FDIC INSURED      MAY LOSE VALUE      NO BANK GUARANTEE  
NOT A DEPOSIT      NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY





**Location and visiting**

Frequent visits generally will improve the resident’s mental and emotional well-being and ensure that quality-of-care issues can be addressed as they arise.

Is the facility convenient to the resident’s family members and friends? **Yes No**

What are the visiting hours?

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Are family visits welcomed? **Yes No**

Are there restrictions on visits by children? **Yes No**

Are family members allowed to take residents out for a day or overnight? **Yes No**

Are there areas where family and friends can visit privately? **Yes No**

Is the facility close to the office of the resident’s doctor? **Yes No**

Is the facility convenient to public transportation? **Yes No**

**Residents’ mental and emotional well-being**

Are activities planned each day for the residents? **Yes No**

Are events regularly scheduled? (Ask to look at the schedule.) **Yes No**

Are there activities for residents who can’t leave their beds? **Yes No**

Is there a library available for residents, with large-print and audio books? **Yes No**

Is there a small “store” for purchasing personal items, such as shaving cream, hair care products, and snacks? **Yes No**

Is there a safe place for residents to enjoy outdoor areas, such as an enclosed garden? **Yes No**

Are plants, pets, and other natural elements added to the residents’ environment? **Yes No**

Are residents taken to special community events and cultural activities? **Yes No**

**Rooms**

Will the resident share a room and/or a bathroom with one or more other residents? **Yes No**

How are roommates and rooms selected? \_\_\_\_\_  
\_\_\_\_\_

If the resident is dissatisfied, can roommates be changed? **Yes No**

How is this accomplished?  
\_\_\_\_\_  
\_\_\_\_\_

Can the resident bring some of his or her own furniture and decorations? **Yes No**

Is drinking water readily available? **Yes No**

Are nurse and emergency call buttons within easy reach of bed, toilet, and bath? **Yes No**

**The resident’s care plan**

Individual care plans must be implemented for each resident.

How often is the care plan reviewed and changed? \_\_\_\_\_

What is the protocol for handling problems? \_\_\_\_\_  
\_\_\_\_\_

Are there regular fire drills? **Yes No**

What bathing facilities are available, and how is bathing handled when the person needs assistance?  
\_\_\_\_\_

**Nursing home employees**

How are employees selected?  
\_\_\_\_\_

Are employees screened for drug use, criminal records, or other potential problems? **Yes No**

What is the turnover rate for skilled employees? \_\_\_\_\_

What is the turnover rate for employees who perform ancillary services, such as meal preparation and financial recordkeeping? \_\_\_\_\_



Are registered nurses or licensed practical nurses on duty at all times? **Yes No**

Is a trained social worker on staff? **Yes No**

What is the ratio of staff to residents during each shift? (Ideally, a facility will have one nurse's aide for every five or six residents between 7 a.m. and 11 p.m.) \_\_\_\_\_

Does the staff treat residents with respect? **Yes No**

Are staff members available to talk if you have a question about a loved one's care? **Yes No**

**Medical care**

If there is a physician that is used by the majority of residents? **Yes No**

What are his/her qualifications? \_\_\_\_\_

How often is the doctor on the premises? \_\_\_\_\_

Does the doctor have a good bedside manner with residents? **Yes No**

May residents use their personal physician if they choose? **Yes No**

Are there arrangements with a nearby hospital in the event of a medical emergency? **Yes No**

Are mental health services available? **Yes No**

What diagnostic treatment facilities are available at the facility? \_\_\_\_\_

**Meals**

Eating is both a necessity and a pleasure that continues even when we're unable to enjoy much else.

Are meals served in a communal dining room or is each resident brought meals in his or her room? \_\_\_\_\_

If communal, how are tables assigned in the dining room? \_\_\_\_\_

How long does it take for a meal to be delivered to a bedridden resident? \_\_\_\_\_

How does the food taste, and how is it presented to the resident? \_\_\_\_\_

Is there a way to heat food that has become cold? **Yes No**

Can you stay for a meal? (This will help you gauge the quality of the food service.) **Yes No**

**Admission requirements**

What financial information will the facility require during the admissions process? \_\_\_\_\_

Can the resident or his representative have copies in advance of all admissions documents and contracts for review? **Yes No**

How long does the admissions process take? \_\_\_\_\_

**Cost of care**

What is included in the cost of care? \_\_\_\_\_

How are "extra" items billed? \_\_\_\_\_

Can laundry be taken off premises? **Yes No**

Does this save the resident some costs? **Yes No**

How are prescription drugs handled? \_\_\_\_\_

What is the cost difference between a private room and a semiprivate room? \_\_\_\_\_

**Transportation services**

If required nonemergency medical services are not available on premises (such as dialysis), how is transportation arranged? \_\_\_\_\_

What about transportation to other places, such as local stores and religious services? \_\_\_\_\_

## Resources

### CareScout

[www.carescout.com](http://www.carescout.com)

An unbiased source for ratings and reviews of eldercare providers nationwide. Detailed, 7 to 10 page nursing home reports are available for a small fee and include information on quality, resident population profiles, and health violations.

### ElderLawAnswers

[www.elderlawanswers.com](http://www.elderlawanswers.com)

Offers tips on choosing a facility, talking with family about placement, residents' rights, and resolving disputes. Also lists qualified elder law attorneys nationwide.

### Nursing Home INFO

[www.nursinghomeinfo.com](http://www.nursinghomeinfo.com)

Offers a facility search function, a needs assessment survey to help you determine the type of facility you should be looking for, and explains what a nursing home is and what types of services are provided.

Silin, Peter S., *Nursing Homes: The Family's Journey*.

(The Johns Hopkins University Press, 2001, 304 p., \$17.95.)

Burger, Sarah, Editor, *Nursing Homes: Getting Good Care There*.

(Impact Publishers, 2001, 176 p., \$14.95.)

Rantz, Marilyn, et al. *The New Nursing Homes: A 20-Minute*

*Way to Find Great Long-Term Care*. (Fairview Press, 2001, 160 p., \$14.95.)

Charlap, Steven S., M.D., *Making Sense of Nursing Homes:*

*A Guide for Families*. (Age Sense, 2002, 128 p., \$19.95.) To order, call 1-866-237-3673.

Martin, Lawrence M., *The Nursing Home Decision: Easing the*

*Transition for Everyone*. (John Wiley & Sons, 1999, 175 p., \$14.95.)

## Contact your investment professional for more information.

This material is not intended to replace the advice of a qualified attorney, tax adviser, investment professional, or insurance agent. Before making any financial commitment regarding the issues discussed here, consult with the appropriate professional.



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