THE CARE PARTNER PROJECT

Preview Safe & Sound™ Checklists

Support Residential Care Choices for Seniors

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YOUR LOGO

THERE ARE 4 TYPES of senior living communities:

Continuing Care:
independent apartment living for those 55+ and for whom amenities are more important than daily support.

Assisted Living:
apartment living with extra support services as needed.

Memory Care:
for those suffering from Alzheimer's or another form of dementia who can no longer be cared for safely at home.

Long-term Care:
licensed medical professionals offer 24/7 skilled care for residents with significant medical needs.

PLAN AHEAD:

If transitioning to higher levels of care within the same community is available and is important to you, be sure to tour all of the facilities – not just the one your loved one would be entering first. You cannot assume the amenities and accommodations will be the same.

HOW TO HELP

PREPARE FOR CHOOSING A SENIOR LIVING COMMUNITY

BEFORE YOU BEGIN YOUR SEARCH:

Be sure you know what's important to your loved one.

Spend time discussing this with them and take lots of notes!

- ☐ Everyday personal support needed
- ☐ Medical care needed
- ☐ Meal and food preferences
- ☐ Types of social interaction preferred
- ☐ Favorite hobbies and activities
- ☐ Location preferences
- ☐ Pets allowed?
- ☐ Visiting accommodations

Whether in person or by phone, it's important to talk to your loved one about what they want.

Have a clear picture of your budget and financial resources.

- ☐ Insurance for long-term care
- ☐ Family resources, personal savings
- ☐ Medicaid or other state funded program?
- ☐ For extra expenses, will you plan to pay out of pocket?
- ☐ What are your preferences for payment?

PLAN YOUR SEARCH:

Narrow down your list of prospects to save time and energy.

- ☐ Review their online presence and reviews.
- ☐ Conduct phone interviews (using separate checklist of questions)

Tour the most promising facilities in person.

- ☐ Notice sights, sounds, smells — they all matter — providing important clues to the quality of care.
- ☐ Make small talk with residents, their visitors, and any staff you may come across. Introduce yourself and your loved one, and ask questions about their life in the community.

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YOUR LOGO

Be on the alert for these red flags that may signal poor quality, risky care, and other concerns:

- *Pressure for you to come in for a visit instead of spending time with you on the phone/short answers/person doesn't know answers.*
- *Unsafe staffing ratios.*
- *Inadequate licensing.*
- *Lack of Registered Nurses*
- *High staff turnover.*
- *Poor supervision (no or infrequent rounding by senior administration).*
- *Not doing any in-person tours (blame on Covid).*

CONDUCT A PHONE INTERVIEW WITH A SR. LIVING FACILITY

Save yourself valuable time by screening facilities by phone first to whittle down your list of possibilities worth a tour.

DAILY STAFFING:

Credentials, Quality, Consistency, Reliability?

- ☐ What is the staff:resident ratio?
- ☐ What is the clinical staff:resident ratio?
- ☐ RNs vs. LPN's vs CNAs—number and ratio
- ☐ Staff turnover: how long has the director worked there? What about the prior director?
- ☐ Longest tenure on staff
- ☐ When is an administrator on site? (working hours)
- ☐ How often does the administrator round on nursing stations or care units?
- ☐ Who is the Chief Nursing officer? (Look up on LinkedIn)
- ☐ Any other certifications on staff?
- ☐ How many shifts in a day?
- ☐ How is oral/dental care provided?
- ☐ Staff Training (culture of continuous improvement?)
- ☐ Orientation and staff training: how are new employees on-boarded and what are provisions for ongoing training

LEVELS OF CARE:

- ☐
- ☐
- ☐
- ☐

LICENSES:

- ☐
- ☐

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PROPERTY & MANAGEMENT:

Property Management:

- ☐ Ownership (Look up on LinkedIn)
- ☐ Administrative staff names (Look up on LinkedIn)

Property Layout:

- ☐ Number of current residents and maximum capacity of residents allowed according to their license
- ☐ Number of units and layout (rooms, studios, apartments)
- ☐ Sizes of each type of unit
- ☐ Availability of private and shared living arrangements?

Meal Service for Residents:

- ☐ Transportation services available?
- ☐ Number of meals provided daily/monthly (is there a meal plan?)
- ☐ Where are meals served? Dining room? In-room dining available?

CRITERIA FOR ACCEPTANCE:

- ☐ Physical, mental and financial criteria?
- ☐ Interview required?
- ☐ Medical records?
- ☐ Financial resources required?

AMENITIES & ACTIVITIES:

Activities: Type & Frequency

(Ask for a calendar of past and upcoming activities.)

- ☐ Arts, painting, drawing, crafts
- ☐ Classes
- ☐ Trips (local and otherwise)
- ☐ Card and game groups (bridge, bingo, chess, etc.)
- ☐ Book club
- ☐ Hobby clubs (genealogy, gardening, more)
- ☐ Trivia
- ☐ Guest speakers
- ☐ Movie theater
- ☐ Sports events, teams (bocce, paddle, tennis, golf, more)
- ☐ Transportation provided to shopping, appointments (frequency, arrangements, cost)
- ☐ Outdoor facilities: bike paths/lanes, walking paths, sport courts, dog park, golf cart paths
- ☐ Guest quarters
- ☐ Gym, work-out facilities, personal trainers

Services: Personal & Medical

- ☐ Physical therapy
- ☐ Occupational therapy
- ☐ On-site personal services: hair salon, barbershop, manicure, massage, facials, more?
- ☐ On site services: banking/ATM, post office, UPS, car wash
- ☐ On site lab for blood tests ordered by doctor
- ☐ On site clinic, staffed by doctor, RN, Physician Assistant
- ☐ Package and mail security (Amazon deliveries)

RESIDENTS' DEMOGRAPHICS:

- ☐
- ☐

AVAILABILITY:

- ☐
- ☐

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MEDICAL CARE:

- ☐ Can I continue with my primary care physician or other specialists or required to use the one in the community?
- ☐ Do you have home health services and if they are out of my network, can I use my own?
- ☐ How are medications dispensed and managed? Does my level of care change with medications?
- ☐ Is there nursing care available 24/7? If so, what type of nurse? RN, LVN, NP?
- ☐ How do you handle special diets or diet modifications?
- ☐ What happens at night if I have a medical problem or how will going to the ER be handled? Does anyone accompany?
- ☐ What is your fall prevention program?
- ☐ Do you have palliative, end-of-life or hospice care options available?
- ☐ If admitted into the hospital, what is the policy for returning? Who brings back? Who accompanies for discharge conversation? How is family involved? Who reviews discharge instructions, and how soon after return?
- ☐ If I'm in the hospital for a partial month, do I still have to pay the full monthly rate?

MEDICAL EMERGENCY PROCEDURES:

- ☐ Where are POLST and DNR forms stored, handled?
- ☐ How are these forms shared with emergency personnel?
- ☐ Which hospital would EMTs go to? (Check out the hospital's rating.)
- ☐ Would someone from the staff go to the hospital with my loved one in an emergency?
- ☐ How would family be notified?

COVID CARE PROCEDURES:

- ☐ How handled
- ☐ Rate of infection

LIFE/CARE TRANSITIONS:

- ☐ When decline occurs, how is care staged and who decides?
- ☐ How does the care change?
- ☐ Costs involved?
- ☐ What is the scope of care offered under their license?

WELCOME & ACCLIMATION:

- ☐
- ☐
- ☐

VISITING PROVISIONS:

- ☐
- ☐
- ☐

WHAT ARE THE COSTS:

- ☐ Will the fees increase annually and if so, how much?
- ☐ What is included in the fee? Does it change with levels of care?
- ☐ Is the fee all-in-one or are there added packages?
- ☐ Can you permit outside agencies to assist with care (home health, nurses aide, sitters)?
- ☐ Do you require in-house pharmacy, or can I use my own?
- ☐ Are there any upfront fees such as a one-time move-in fee?

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YOUR LOGO

While You Tour With Your Loved One:

Make small talk with residents, their visitors, and any staff you may come across. Introduce yourself and your loved one, and ask questions (tailor them to your loved ones' needs and interests):

- ☐ How do you like living/ working here?
- ☐ How long have you lived/ worked here?
- ☐ How have things changed (for better or worse) during that time?
- ☐ Are you happy with your decision to move in/take the job?
- ☐ What do you like most?
- ☐ What would you like to see improved?
- ☐ How responsive is management to your concerns?

HOW TO HELP

NAVIGATE YOUR TOUR OF A SENIOR LIVING COMMUNITY:

TOUR WITH YOUR FIVE SENSES:

Sights, sounds, smells — they all matter — providing important clues to the quality of care.

SIGHTS:
Clean surroundings, contented people

SMELLS:
Yucky odors, freshness

SOUNDS:
Kind voices, calm vs. chaos

TASTE (and nutrition):
Eat at least one meal in the dining area with your loved one.

- ☐ Pay close attention to the other residents as well as your loved one.
- ☐ How are the food quality, quantity, and presentation?
- ☐ Are there healthy options?
- ☐ Is there enough variety in the weekly menu?
- ☐ What is the overall vibe in the room, are residents enjoying themselves.
- ☐ Are they positively interacting with each other?
- ☐ How are the staff treating the diners? With respect and kindness?
- ☐ If there are residents who need assistance, is it being provided in a timely and caring manner?
- ☐ Do they seem to be enjoying the food or just pushing it around their plate?

- ☐ Ask if there is a qualified nutritionist on staff.
- ☐ Ask to see a meal menu for a month.
- ☐ Discuss availability of nutritious snacks on site.
- ☐ Discuss your loved ones' special dietary needs.

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BE ON THE ALERT FOR RED FLAGS THAT MAY SIGNAL POOR QUALITY, RISKY CARE, AND OTHER CONCERNS.

- ☐ What you see doesn't line up with what you were told when you called.
- ☐ Residents appear unkempt.
- ☐ You don't hear any happy voices! Staff is grumpy, sour, unfriendly and residents appear somber, bored, sad or listless.
- ☐ You see staff on personal phones! You see staff sitting around, just doing nothing.
- ☐ Odd smells, bad smells come from residents, their rooms or public areas.
- ☐ Unclean public bathrooms.
- ☐ Unclean residents' bathrooms.
- ☐ Interactions with residents.
- ☐ Poor quality of food, nutritional content.

LISTEN TO YOUR GUT:

What's the overall vibe you feel as you are touring?

NOTES:

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YOUR LOGO

WHAT ARE YOUR ASSETS & RESOURCES?

Before you begin your search into living options, you'll need a good picture of your loved one's financial resources. Create a spreadsheet of all assets and income.

- ☐ Long-Term Care insurance?
- ☐ Family resources, personal savings?
- ☐ Life insurance policies.
- ☐ Pension benefits.
- ☐ Medicaid or other state funded program?
- ☐ For extra expenses, will you plan to pay out of pocket?
- ☐ What are your preferences for payment?

Check out the licensing granted to each facility you are considering:

- ☐ What does their license cover?
- ☐ What does it not cover?
- ☐ Does the license cover services that you or your

Consider hiring a specialist to help analyze assets and all potential current and future expenses. If an option, include aging-in-place scenarios.

HOW TO HELP

NAVIGATE COSTS & CONTRACTS OF A SR. LIVING COMMUNITY

Many of these senior living options require contracts… which can be complex financial and real estate transactions, usually with a large company that owns the residential community.

CONTRACT CONSIDERATIONS

Consider reviewing any contract, or even a simple agreement, with an attorney familiar with senior care.

Some things you and your attorney may want to look for or write into the agreement:

- ☐ Does the contract require notice to move-out? Length of notice? Any costs? Penalties?
- ☐ Who is responsible for your loved one's bill? Is there a "co-signer" requirement? If so, what are their responsibilities?
- ☐ Add to the contract all services verbally promised in discussions with representatives. (Then, of course, keep track of the services actually received.) Use our checklists to help you!

Ask your attorney about these topics and how they might be addressed in the contract:

- ☐ What happens if the facility loses its license or accreditation, or the license is changed and no longer covers the services needed by your loved one?
- ☐ What happens if your loved one needs additional services down the road, how does the contract cover potential transitions needed?
- ☐ If a portion of your loved one's expenses are covered by insurance, Medicare or Medicaid, what happens if the facility changes or loses its standing to take these forms of payment?

- ☐ If your loved one is moving into a continuing care community through independent living, who makes the decision to transition to assisted living or memory care if your loved one declines? Your loved one? The person with their medical power of attorney, or the company?

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Nothing in life prepares your patients and their loved ones to manage a serious illness. Safe & Sound™ resources express your empathy and commitment to care that meets patients where they are.

Together, you are prepared to partner for patient-centered care.

Ready to partner for patients? Let's talk!

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