

Continuing Care Retirement Communities Checklist

Living Space and Accommodations

- _____ Do residents purchase or rent the apartments? What is the cost?
- _____ Do you have freestanding homes available?
- _____ What are the floor-plan options? Are balconies or patios available?
- _____ Are the apartments/homes furnished or unfurnished?
- _____ Do the apartments/homes include all-electric appliances? Are light fixtures included?
- _____ Do the apartments have individually controlled heating and air-conditioning?
- _____ Are window treatments provided?
- _____ What is the policy about personal belongings in the apartments/homes?
- _____ What happens when my health care needs change?
- _____ Is the community affiliated with a hospital or nursing home? If I need acute care or long-term care, will I receive priority in the admission process?
- _____ If I need to go to the hospital or a nursing home for a short stay, will my room be held?
What are the associated fees? Will I receive a discount for unused services (e.g., meals)?
- _____ What is the policy for overnight guests? Are guestrooms available? What is the cost?
- _____ Is additional indoor storage available? Is there any extra fee?
- _____ Can I have a car? Is free parking available?
- _____ Are public patios and courtyards available for my use?
- _____ Is an area available for me to garden?
- _____ Does the community provides 24-hour security?
- _____ Are pets allowed to live in my residence? If so, are additional fees or deposits required? If not, are pets allowed to visit?

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Staff

- _____ What are the community's staffing patterns?
- _____ What training and qualifications are required for staff? Do staff members attend ongoing training programs?
- _____ Observe staff and resident interactions. Are they positive? Courteous?
- _____ Is the staff approachable?
- _____ Ask other residents whether staff members handle requests in a timely way?
- _____ Can private-duty companions be hired? What is the procedure for that type of service?
- _____ Does the facility have a volunteer program? If yes, what types of activities do the volunteers perform?
- _____ Ask residents whether the administrator/director practices an "open-door" policy.

Services, Activities and Amenities

Be sure to ask whether the facility charges an additional fee for the services, activities or amenities offered.

- _____ What services and activities do you offer?
- _____ Are there special programs for persons with my condition?
- _____ Are the services of a physical, occupational or speech therapist available or arranged?
- _____ Do staff members assist residents in administering medication? If so, who does that?
- _____ Are professional nursing services available on site? If not, does the staff assist residents and families in making arrangements through a home health agency?
- _____ Are bed linens and towels provided?
- _____ Do you provide laundry services?
- _____ Are beauty shop services available on site?
- _____ What recreational and spiritual services are available? Ask for a copy of the activities calendar.

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- _____ Is transportation provided for medical appointments and recreational purposes? Is there a fee?
- _____ Are there resident or family councils? How often do they meet?
- _____ Is hospice care offered? If so, does the facility coordinate that care with my physician and family?

Dining and Food Services

- _____ Does the community accommodate special diets?
- _____ Does a dietician or nutritionist review menus? Ask for a copy of the menus.
- _____ How often do the menus rotate?
- _____ May a guest join me for meals? Is there a fee?
- _____ May my family plan special occasions/meals in a private dining room?
- _____ Are meals/snacks available at any time?
- _____ What are the criteria for residents to eat meals in their rooms?

Moving In

- _____ What does the process of moving in entail? What are the paperwork requirements and the timeframes involved? Does the community provide any assistance with the move-in?
- _____ Can I paint my room or put up a border on the walls prior to move-in?
- _____ How is my initial health assessment managed? Who completes the assessment?
- _____ Does the CCRC subscribe to a set of resident rights and responsibilities? Are printed copies of resident rights and responsibilities available?

Costs and Fees

- _____ What is included in the basic monthly cost? Ask for a written copy of the contract.
- _____ Does the community have a written schedule of fees for extra services? If so, request a copy.
- _____ Under what circumstances might the fees change? How much notice is given if fees increase?

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_____ Is a security deposit required? What is the refund policy?

_____ Can service agreements and/or contracts be amended or modified?

Contracts

_____ Does your facility require an all-inclusive contract or a fee-for-service contract?

_____ What is covered under the contract?

_____ Is there an “admission” or “entry” fee?

_____ Is this fee refundable?

_____ Will I own my unit?

_____ What are the current monthly/annual fees?

_____ What is included in the basic monthly cost?

_____ Do you have a written schedule of fees for extra services?

_____ What services are not covered under the contract?

_____ Under what conditions may costs increase?

_____ Can contracts be amended or modified?

Complaints

_____ Whom should I call with questions or complaints?

_____ Is there a 24-hour telephone number I can call?