

## **CCRC Checklist**

Use this checklist as you visit the Continuing Care Retirement Community. The checklist will help you compare communities you are considering.

### **First Impressions**

- Do you like the community's location and outward appearance? Why or why not?
- Is the community convenient for frequent visits by family and friends?
- Is the community near a shopping, and entertainment complex?
- Can the resident access a medical complex easily?
- Is public transportation available/accessible?
- Are you welcomed with a warm greeting from the staff?
- Does the staff address residents by their names and interact with them during your tour?
- Do you notice the residents socializing with each other and do they appear content?
- Can you talk with residents about how they like living there and about the staff?
- Is the staff appropriately dressed, friendly and outgoing?
- Do the staff members treat each other in a professional manner?
- Are visits with the residents encouraged and welcome at any time?
- What percentage of the homes has been rented and is occupied?
- Is there a waiting list? If so, how long do they estimate it will take to be admitted?

### **Living Area and Accommodations**

- Is the floor plan well designed and easy to follow?
- Are doorways, hallways and rooms accommodating to wheelchairs and walkers?
- Are elevators available for those unable to use stairways and handrails to aid in walking?
- Are floors of a non-skid material and carpets conducive for safe walking?
- Does the residence have good lighting, sprinklers and clearly marked exits?
- Is the residence clean, free of odors and appropriately heated/cooled?
- What is the community's means of security if a resident wanders?

- Are the common areas in general attractive, comfortable and clean?
- Is there an outside courtyard or patio for residents and visitors and can they garden?
- Does the residence provide ample security and is there an emergency evacuation plan?
- Are there different sizes and types of units/housing available with optional floor plans?
- May they decorate their own rooms? Is there adequate storage space?
- Is a 24-hour emergency response system accessible from the unit with own lockable door?
- Are bathrooms private with handicapped accommodations for wheelchairs and walkers?
- Do all units have a telephone and cable TV and how is billing handled?
- Does kitchen unit have refrigerator/sink/cooking element and can food be kept in their units?
- May residents smoke in their units or are there designated public areas?

### **Moving in/Contracts and Finances**

- What's involved with the moving in/out process? How is the initial needs assessment done?
- Does assessment process include the resident, family, community staff along with the physician?
- For assisted living, is there a written plan for the care of each resident and is there an ongoing process for assessing a resident's need for services and how often are those needs evaluated?
- Inquire as to what kinds of contracts are available to you. The CCRC contract is a legal agreement between you (the consumer) and a continuing care retirement community. This agreement generally secures living accommodations and services, including health care services, over the long term. Determine what fee structure and contract option best suits you.
- Find out what the payment schedule is and if the residents own or rent their unit.
- What is the basic entrance charge, and what is included for that fee? What charges are extra?
- How much is the monthly fee? How often can it be increased and for what reasons? Is there a limit on the amount of increase per year? What is the history on monthly fee increases?
- Are refunds or rate reductions ever granted? Under what conditions?
- Are any portions of the charges covered under long-term care insurance that the resident may already have or be eligible for? Are there charges that are duplicated?

- What happens if a couple moves into an apartment and then one of them must go to the nursing home and/or dies? Will the other one be allowed to stay in the same apartment and how will this effect rates?
- What happens if someone wants to leave after just a few weeks or months, or if they die? Is any portion of the entrance fee refunded to their estate?
- What type of health and medical coverage is included in the entrance and monthly fees? Are dental work, vision exams and routine wellness checkups included?
- What determines when a resident is moved to a nursing care community and who decides?
- Will the community guarantee that nursing home care will be available on the premises, or nearby, when needed? What rates will residents be charged for such care?
- Do billing, payment and credit policies seem fair and reasonable? May resident handle his/her own finances with staff assistance if able? Must a family member/outside party be designated?

### **Health/Personal Care/Services**

- What type of healthcare and personal care services are available? Does the community have both short and long-term services, such as routine physical and dental examinations and pharmacy services, as well as skilled nursing and therapy services?
- Can the community provide a list of available services and are residents and families involved in developing the service agreement? Who provides these services/what are their qualifications?
- Is staff available to provide 24-hour assistance with activities of daily living (ADLs) if needed?
- Does residence have programs for Alzheimer's, other dementias and other specialized areas?
- 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?
- Will the staff dispense medication to able residents? If so, what are the dispenser's qualifications? Will they monitor residents taking medications?
- Are housekeeping, linen service and personal laundry included in the fees, or are they available at an additional charge? Are on-site laundry facilities available and convenient?
- Does the residence provide transportation to doctors' offices, the hairdresser, shopping and other activities desired by residents and can it be arranged on short notice?
- Are pharmacy, barber/beautician and/or physical therapy services offered on-site?

## **Social and Recreational**

- What kinds of group/individual recreational activities are offered and who schedules them?
- Is there an organized activities program with a posted daily schedule of events?
- Does the community schedule trips or other events off premises?
- Are the resident activity (social) areas appropriate and desirable to the prospective resident?
- Do residents participate in activities outside of the residence in the neighboring community?
- Are there supplies for social activities/hobbies (games, cards, crafts, computers, gardening)?
- Are religious services held on the premises? Does the residence arrange for nearby services?
- Do volunteers and family members come into the residence to participate/conduct programs?
- Does the residence create a sense of community by allowing residents to participate in certain activities or perform simple chores for the group as a whole?
- Are there fitness facilities, as well as regularly scheduled exercise classes?
- Are residents' pets allowed in the residence? Does community have pets and who cares for them?

## **Staff**

- Do the staff members have professional backgrounds in continuing care and geriatrics field?
- What are the hiring procedures and requirements for eligibility? Are criminal background checks, references, and certifications required?
- Is there a staff-training program in place and what does it entail?
- Is staff courteous to residents and to each other? Are responses for assistance timely?
- Is the administrator or appropriate staff person generally available to answer questions or discuss problems and would you be comfortable dealing with them on a daily basis?
- Does the community have a volunteer program or is it affiliated with any student clinical program?

## **Food**

- What are the different meal programs offered? Does the residence provide three nutritionally balanced meals a day, seven days a week, and how does the menu vary from meal to meal?

- What about special diets; does a qualified dietitian plan or approve menus?
- Are residents involved in menu planning and may they request special foods?
- Are common dining areas available and when can residents eat meals in their units?
- Does dining room environment encourage residents to relax, socialize, and enjoy their food?
- Are meals provided only at set times or is there some flexibility? Are snacks available?
- How many meals are included in the fee? If a resident becomes ill, is tray service available?
- Can residents have guests dine with them for an additional fee? Is there a private dining room for special events and occasions, if desired?

### **Licensure and Certification**

- Is the community accredited by the Continuing Care Accreditation Commission? Accreditation is not required and not all CCRCs are evaluated.
- Is the nursing center Medicare and/or Medicaid certified?
- What reputation does the community have in the community? How long has it been in business? Is it in good financial health? Does the community follow generally accepted accounting procedures?
- If the community is sponsored by a nonprofit organization and managed under contract with a commercial firm, what are the conditions of that contract?
- Is there a resident council or organization through which residents/family have a means of voicing their views on the management of the community?