

STEP 2: BEFORE THE MOVE Assisted Living Community

TOP 5 ESSENTIALS

1. Assess facility costs and probable cost increases
2. Don't be afraid to speak up--talk to the facility administrator about your concerns to get the answers you need
3. Schedule move for a weekday, NOT a holiday or weekend
4. Transition senior when they are in good health and prepared to move
5. Complete all admittance paperwork so as to avoid stress
6. Allot at least 6-7 hours for moving

CHECKLIST

Location	Completed	Not Necessary	Notes
Arrange transportation for senior to facility (ambulance if necessary)			
Arrange for family and friends to meet at facility to ease transition			
Time drive to and from facility			
Obtain guest parking policy and availability			
Spend time in neighborhood to ensure safety and determine boundaries			

Home	Completed	Not Necessary	Notes
Take pictures of how items are arranged on shelves to duplicate when unpacking			
Prepare a "Do Not Pack" area so there are items available the night before the move (see what to include on last page)			
Pack an "Open Me First" box with necessary toiletries and necessary clothing for the first night (see what to include on last page)			

Safety	Completed	Not Necessary	Notes
Ensure safe admittance (wheelchair, contact person)			
Ensure elevator is working for admittance			
Test future resident's vision in facility lighting			

Rooms/Apartments**Completed Not Necessary****Notes**

Walk through assigned room for necessities and develop floor plan			
Test call system in room			
Re-check grab bar by bed and in bathroom			

Staff and Management**Completed Not Necessary****Notes**

Confirm staff language compatibility with resident			
Observe staff assistance during night or weekend			
Observe nurse on staff or on-call			
Observe staff/resident interaction on second visit as friendly and helpful			
Determine who will be your contact person at facility, as well as a backup person for emergencies and vacation			

Residents**Completed Not Necessary****Notes**

Observe residents for compatibility of age ranges			
Observe residents for compatibility of ethnicities			
Check for compatibility of religious backgrounds			
Observe residents' agility level for compatibility			
Observe friendly interactions between residents			

Care**Completed Not Necessary****Notes**

Submit all admitting paperwork			
Obtain written policies from management about progressive diseases			
Obtain written determination of level of care after assessment			
Obtain a copy of health emergency protocols			

Meals**Completed Not Necessary****Notes**

Register dietary preferences			
Confirm taste of food being served (meals and snacks) - eat!			

Activities**Completed Not Necessary****Notes**

	Completed	Not Necessary	Notes
Obtain copy of daily exercise offerings			
Make sure activities scheduled are actually taking place			
Confirm appointment transportation and possible cost(s)			
Confirm spiritual services and obtain schedule			

Facility Features & Aesthetics**Completed Not Necessary****Notes**

	Completed	Not Necessary	Notes
Observe odor of multiple environments			
Observe temperature maintenance per resident request			
Observe quality of amenities (beauty shop, outdoor gardens)			
Obtain copy of pet policy and possible costs			

Costs**Completed Not Necessary****Notes**

	Completed	Not Necessary	Notes
Pay costs, obtain outline and receipt			
Obtain detailed statement of services included			
Obtain written statement of criteria for fee increase			
Obtain written policy on monthly rate cap			
Obtain written refund policy			
Obtain written criteria that would require resident to have to move out			

DO NOT PACK LIST

- Clothing
- Towels
- Toiletries
- Keys, wallet, checkbook, cell phone/charger
- Prescription medications

OPEN ME FIRST BOX

- Towels
- Bedding
- Telephones, clock radios
- Toilet paper
- Snacks
- Paper plate
- Coffee/tea pot and filters