

FROM THE AMERICAN HEALTH CARE ASSOCIATION
<http://www.longtermcareliving.com/assess/al/assisted8.cfm>

Choosing An Assisted Living Residence: A Consumer's Guide

The aging of America, together with extended life expectancy, is resulting in an unprecedented demand for all kinds of long-term care services. Among these services are assisted living residences. The philosophy of assisted living is to provide supervision, assistance and personal care services to senior citizens and individuals with disabilities as needed. The goal is to maintain maximum independence in a home-like setting, while providing individualized care and assistance. Assisted living offers a unique mix of security and independence, privacy and companionship, care and services.

Choosing the appropriate assisted living residence can make all the difference in an individual's mental, physical, and social well being. Whether you need care for a loved one, or for yourself, this brochure will help you learn about assisted living, determine whether it is an appropriate living option for your particular needs and preferences, and help you make a wise selection.

Assisted Living Today

Assisted living is part of a continuum of long term care services that provides a combination of housing, personal care services, and health care designed to respond to individuals who need assistance with normal daily activities in a way that promotes maximum independence.

Assisted living services can be provided in freestanding residences, near or integrated with skilled nursing homes or hospitals, as components of continuing care retirement communities, or at independent housing complexes.

Assisted living residences offer a multi-faceted residential setting that provides personal care services, 24-hour supervision and assistance, activities and health-related services, designed to:

- Minimize the need to relocate;
- Accommodate individual residents' changing needs and preferences;
- Maximize residents' dignity, autonomy, privacy, independence, choice and safety; and
- Encourage family and community involvement.

Services And Activities

The services and activities provided or arranged for in assisted living residences generally include:

- 24-hour supervision;
- Three meals a day in a group dining room; and
- A range of services that promote the quality of life and independence of the individual; such as :
 - Personal care services (help with bathing, dressing, toileting, etc.)
 - Medication management, or assistance with self-administration of medicine;
 - Social services;
 - Supervision and assistance for persons with Alzheimer's or other dementias and disabilities;
 - Recreational and spiritual activities;

Exercise and wellness programs;
Laundry and linen service;
Housekeeping and maintenance; and,
Arrangements for transportation.

In most states, assisted living residences are registered, licensed or certified by an appropriate department or agency of the state that has a process for issuance of initial licenses and for renewing existing licenses.

Each resident receives individualized services to help him/her function within the residence and within the community. Upon admission, a service plan is usually developed to coordinate the delivery of services to each resident. The agreement, which includes an assessment or evaluation of the resident's physical and psychosocial needs, is reviewed and updated regularly by the staff, and as the resident's condition indicates. The resident and family, or responsible party are encouraged to play an active role in the development of the service plan.

A resident care or wellness coordinator is usually designated to oversee the process of developing, implementing, and evaluating the progress of the service plan. A copy of the service plan is provided to the resident, family, or responsible party upon request.

Personal Care And Health Services

Assisted living residences provide supervision or assistance with activities of daily living (ADLs); coordination of services by outside health care providers; and monitoring of resident activities to help to ensure his or her health, safety, and well-being. Assistance may include the administration or supervision of medication, or certain personal care services by a trained staff person.

The residence may assist in arranging the appropriate medical, health, and dental care services for each resident. The resident generally chooses his or her medical doctor and dental services.

Residents who have periods of temporary incapacity due to illness, injury, or recuperation from surgery often are allowed to remain in the residence or to return from a rehabilitation center, skilled nursing facility or hospital if appropriate services can be provided by the assisted living residence. It is important to remember that assisted living residences are a bridge between living at home and living in a nursing home. Assisted living residences do not typically provide the level of continuous skilled nursing care found in nursing homes and hospitals.

Residence Accommodations

A residence is defined by the scope of services it provides, not by the number of residents it serves. It is important for residents and families to understand what services the residence offers, as well as the costs and limitations of those services.

Accommodations and options may vary greatly from one assisted living residence to the next (e.g. private rooms, private baths, kitchenettes, etc.). Personal needs and preferences are important criteria for selecting a residence and the amenities it offers.

The typical assisted living residence has approximately 50 resident rooms or apartments that vary in size and design. Most residences are constructed and equipped to comply with a host of local, state and federal regulations. Assisted living residences are designed to be operated, staffed and maintained in a manner appropriate to the needs and desires of the residents served. Caring for

residents with Alzheimer's or other dementias and disabilities requires a residence design and philosophy that assure resident safety and autonomy. Such services should be provided in an appropriate and safe setting that adheres to appropriate local, state and federal regulations.

Philosophy Of Consumer Choice

The philosophy of assisted living is to emphasize the right of the individual to choose the setting in which he/she would like to have care and services provided. In choosing an assisted living residence, you should expect to:

- Be treated with dignity and respect;
- Be informed of services available and the limitations of those services;
- Manage your personal funds;
- Retain and use your personal possessions;
- Interact freely with others both inside the residence and in the community;
- Have freedom of religion;
- Control your health-related services;
- Maintain your privacy;
- Be free to exercise your rights and responsibilities as a resident; and,
- Have the right to voice or file grievances.

Most residences post a listing of residents' rights in a visible place and/or provide new residents with a copy.

In addition to observing the personal rights of those that live there, assisted living residences usually have guidelines for visitors. Most residences also establish house rules pertaining to, for instance, pets, the use of personal furnishings, weapons, tobacco and alcohol.

Personnel

The number and type of staff employed at a residence varies greatly and depends on the number of residents and their needs. Staff may be employed directly by the residence or from an outside health care provider. Typical staff may include:

- Administrators or directors, who manage the residence;
- Nurses, who assist residents with health care services according to state regulations;
- Medication assistants who help residents with their medications;
- Personal care staff, who assist residents with personal needs, such as bathing, eating, and dressing;
- Marketing/Admissions personnel, who market the residence and assist with the move-in process;
- Food service personnel, who prepare and serve nutritional meals to residents;
- Activities coordinators, who organize recreational activities and spiritual programs for residents; and
- Maintenance personnel; and
- Housekeeping personnel.

In general, it is up to the management of the assisted living residence to ensure that appropriate staff is available to properly provide for the health, safety, and well-being of the residents and upkeep of the buildings and grounds.

Paying For Assisted Living

Costs for assisted living residences vary greatly, and depend on the size of rooms, amenities, services provided, and location. Calculating the approximate cost is important as well as understanding what happens if private, personal funds are depleted. While Medicare does not cover assisted living, certain health care services may be available under specific, limited circumstances. Supplemental Security Income may cover some costs and residences may participate in grant programs, the Medicaid program or offer internal assistance programs. The residence's management should be able to answer your questions concerning available assistance programs.

In addition, several private health and long term care insurance policies include assisted living/residential care coverage. However, the majority of assisted living costs are paid through personal finances of residents and/or their families.

Residences should willingly provide consumers with key information regarding base rates, specific fees for additional services, occupancy levels, staffing, and ownership. Obtaining this information is crucial in choosing the appropriate assisted living or residential care residence.

Deciding On An Assisted Living Residence

After you have determined the kind of services you need, obtain a list of assisted living residences in your area. Your personal physician, clergy, social worker, financial planner, and friends may be familiar with a residence.

On this web site you will find a [facility locator](#). You can also check with your state health or welfare departments, your long term care ombudsman, the Area Office on Aging or the Yellow Pages.

By visiting the residences on your initial list, you should be able to narrow the field to two or three meeting the specific services, location, and price range you desire. Talk with the administrators and tour the residences. Try to visit each residence more than once. Arrange to visit the residence during mealtime or arrange to have lunch with residents. This will give you a better feel for what life will be like in the residence. Take along this brochure and use the checklist provided.

Moving Into Assisted Living

Move-in day is often filled with mixed emotions. The family and resident may experience excitement with the decorating and settling in process but also may experience feelings of anxiety and loss. Moving is seldom easy and acceptance of the move as well as actually settling into a routine may actually take place over a period of weeks or longer for some people. Residences sometimes provide a resident handbook explaining policies and procedures, staff contact lists, meal times, and general information about daily living, which may ease the anxiety and pressures associated with the move.

Cost Calculator And Consumer Checklists

The following checklists will be useful in evaluating assisted living residences during a visit. The most important consideration is that each resident has different needs, preferences, desires and financial resources that should be taken into account in choosing an appropriate residence. Remember that you cannot change the resident to fit the residence. Select the residence that best meets the needs of the resident.

The assisted living calculator provides help for estimating the monthly cost. Although residences

charge different fees and provide a variety of different services, this list is provided to prompt the consumer to think about the financial costs and assist in planning for the future.

Assisted Living Cost Calculator

Family and prospective residents may use this worksheet in estimating the monthly cost of needed services. Not all items may be applicable to your situation. Space is provided to add items not covered in this calculator.

- \$_____ Entrance and/or Initial Assessment Fee
- \$_____ Selected Unit and Basic Service Package
- \$_____ Cost for Meals
- \$_____ Cost for Housekeeping
- \$_____ Cost for Personal Laundry Service
- \$_____ Cost for Linen Service
- \$_____ Cost for Medication Management or Assistance
- \$_____ Cost for Personal Care Assistance (bathing, dressing, eating, etc.)
- \$_____ Cost for Recreational Field Trips
- \$_____ Cost for Transportation
- \$_____ Cost for Telephone Service
- \$_____ Cost for Cable Television
- \$_____ Beauty Shop Charges
- \$_____ Other Charges
- \$_____ Other Charges
- \$_____ Other Charges
- \$_____ Total Estimated Monthly Charges

Checklist For Consumers And Prospective Residents

When you are looking for an assisted living or residential care setting for yourself or a loved one, please consider the following checklist to help you make the best choice.

Service Planning

Are the family and the resident involved in the service planning process? How often are residents' needs assessed? Who completes the assessment?

Are there special programs for memory impaired residents and residents with dementia?

Are there accommodations for memory-impaired residents to be outside and exercise?

Are there special programs for residents with disabilities?

How are emergency situations managed? What is the protocol for such events?

What happens if the health care needs of a resident change? Under what conditions are residents asked to move if there is a change in health status?

Services and Activities

Does staff assist residents in administration of medication? If so, what kind of staff?

Does the residence generally use a particular pharmacy? If applicable, does that pharmacy participate in the individual's Medicare Part D prescription drug plan? Does the pharmacy provide a yearly review and consultation services?

Are there professional nursing services on site? If not, does the staff assist residents and families in making arrangements through a home health agency?

Are the services of a physical, occupational or speech therapist available or arranged?

Does the residence provide bed linens and towels?

Does the facility provide laundry service?

Are there beauty shop services available on site?

What recreational and spiritual activities are available? Obtain or review a copy of the activities calendar.

Are the activity supplies available for resident use outside of scheduled programs?

Is transportation provided for medical appointments and recreational purposes? Is there a fee?

Are there resident and family councils? How often do they meet?

What are the suggestion, complaint, or grievance procedures?

Can hospice care be offered? If so, does the facility coordinate that care with the physician and family?

Staff

Ask about the residence's staffing patterns and philosophy about staffing.

What training and qualifications are required for staff? Are there on-going training programs provided for staff?

Observe staff and resident interactions. Are they positive? Courteous?

Does staff handle resident 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?

Does the administrator/director practice an "open door" policy?

Moving In

What does the moving in process entail? What are the paperwork requirements and the timeframes involved?

How is the initial assessment managed? Who completes the assessment?

Is the residence affiliated with a hospital or nursing home should acute or long-term care be needed? If so, is there a priority admission process?

If you need hospital or nursing home care, is your room held? What are the associated fees? Is there a discount for unused services (e.g. meals)?

Does the residence 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.

Does the residence 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 there is a fee increase?

Is there a security deposit? What is the refund policy?

Can service agreements and or contracts be amended or modified?

Dining and Food Services

Does the residence accommodate special diets?

Does a dietician or nutritionist review the menus? Request or review copies of the menus.

How often do the menus rotate? Are residents and families involved in the menu planning?

Are residents allowed to have guests for meals? Is there a separate guest dining room?

What are the criteria for residents to eat meals in their rooms?

Living Space and Accommodations

Are there adequate community areas for resident use?

Are the resident rooms furnished or unfurnished?

What is the policy about personal belongings?

What is the policy for overnight guests? Are there guestrooms available? What are the guest fees?

Is additional storage space available? Is there an extra fee?

Does the residence meet the rules for people with disabilities?

Can residents have automobiles? Is there assigned parking? Is there an extra fee?

Are there patios and courtyards available for resident use? Is there an area for resident gardening?

Does the residence provide security?

Are pets allowed to reside in the residence? If so, are there additional fees and or deposits?

If not, are pets allowed to visit?

Licensure and Certification

Is the residence licensed? Ask to review the last licensing or certification report.

If the state requires the administrator to be licensed or certified, is it current?

Does the staff actively participate in a professional association, such as a state long term care association affiliated with National Center For Assisted Living?

Safety

- Does the facility have a fire sprinkler system throughout the facility?
- Where are smoke detectors located?
- How often does the facility have fire drills?
- Does the facility have an emergency preparedness plan?
- How are emergency and evacuation plans reviewed with resident after admission to reinforce their memory?
- What systems are used to keep residents with dementia or Alzheimer's secure from successful exit strategies?

Location

- Is the location of the residence convenient to shopping, medical services, and entertainment areas?
- Can family members and visitors easily locate the residence for visiting?

Final Checklist Prior to Signing the Service Contract

This checklist is provided to the family and prospective resident as a final tool once an assisted living residence has been chosen. Use this as a reminder for issues that need to be addressed and fully understood.

Make sure you:

- _____ Know what the basic service package includes
- _____ Know all costs associated with your service package
- _____ Know about additional services and their associated fees (e.g., medication management)
- _____ Know the circumstances why fees might change and how much notice is given to families and residents
- _____ Understand the services planning process
- _____ Understand the service contract
- _____ Know about the criteria and policies associated with discharge
- _____ Understand resident rights and responsibilities
- _____ Know the residence's grievance policy and procedure
- _____ Understand how many staff are available and their qualifications
- _____ Have the name and telephone number of the staff contact person