

Senior living tour checklist

Use the same questions at each visit. Include the person moving, take notes, and ask for important details in writing.

Community: _____ Date: _____ Contact: _____

Care that fits the person

- ☐ Can you meet the person's assessed needs now? Who confirms that, and what information is required?
- ☐ What changes in needs could require different services or another move?
- ☐ How are medications, mobility support, and overnight needs handled?
- ☐ Who should we contact about a concern or change in condition?

Staffing and communication

- ☐ Who is on site during the day, overnight, and on weekends?
- ☐ What training and supervision apply to the care the person needs?
- ☐ How do you communicate with the resident, family, and outside care team?
- ☐ What is your process for emergencies and for addressing complaints?

Daily life and personal preferences

- ☐ What does a typical day look like? What activities are available and optional?
- ☐ How are food preferences, special diets, visitors, pets, and routines accommodated?
- ☐ Can we see the actual room, shared spaces, and outdoor areas?
- ☐ What matters most to the person moving, and how would that work here?

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Costs and written terms

- ☐ What is included in the base rate, and what costs extra?
- ☐ How are care charges determined and changed? Ask for a written estimate.
- ☐ What are the deposit, refund, notice, and discharge or move-out terms?
- ☐ What funding arrangements do you accept, and what happens if resources change?

Before deciding

- ☐ Verify the provider's current license and review available inspection information with the appropriate state agency.
- ☐ Confirm availability, assessment requirements, and what must happen before admission.
- ☐ Ask for the agreement and policies to review before committing.
- ☐ Write down unanswered questions, who will answer them, and the next follow-up date.

Questions to follow up

Want help comparing options? Call Zack for a free introductory conversation.

Planning questions only. This checklist does not replace a clinical assessment, license check, or agreement review. Qualified professionals and providers determine care needs and admission suitability.