LEGG MASON
GLOBAL ASSET MANAGEMENT

Making the grade: Assisted living facilities

Worksheet

Assisted living facilities are designed for individuals who need help with some activities of daily living such as bathing, dressing, cooking or taking medications.

They are not designed to provide 24-hour medical or skilled care. Medicare does not cover assisted living expenses; in some cases, Medicaid may provide for limited services. Some long-term care insurances will cover some of the costs, but this varies by policy. As each state has its own licensing requirements for assisted living, it is important to check to see what services can be provided. Before choosing an assisted living facility, consider the following.

Location

	Yes	No
Is the community convenient to family?	☐	☐
Is the community convenient to friends?	☐	☐
Is the community convenient to shopping?	☐	☐
Is the community convenient to medical care (doctors, specialists, hospitals, specialized rehabilitation facility(ies))?	☐	☐

Community features

Does it feel welcoming?	☐	☐
Is there visitor parking?	☐	☐
Is there storage?	☐	☐
May residents bring personal items from home?	☐	☐
Is there a secured outside area for the residents to walk in?	☐	☐

Community services

What types of services are available?

What are the different dining options available and can they provide for special dietary needs?

Is there a security system?	☐	☐
Is there an emergency response system?	☐	☐

INVESTMENT PRODUCTS: NOT FDIC INSURED • NO BANK GUARANTEE • MAY LOSE VALUE

Health and medical care

What type of health care and personal care services are available?

	Yes	No
Is there a written plan for the care of each resident and is there an ongoing process for assessing changing needs?	☐	☐

How are health problems handled?

Is there a registered nurse on-site?	☐	☐

What kind of medication assistance is available?

What options are available if you need more care?

Who decides when a transition in care level is needed?

How much notice is given?

What happens if someone wants to leave after a month, year or several years?

Is there a program for people with cognitive decline such as Alzheimer's?	☐	☐
Does the facility have a special wing or floor for residents with cognitive impairment such as Alzheimer's disease? If so, is it secured?	☐	☐

Activities and amenities

What types of activities and events are offered?

Who schedules the activities? Are they resident or staff led?

What type of amenities are offered (e.g., dining room, fitness facility and lounge)?

Staff

	Yes	No
Is staff available 24 hours a day?	☐	☐
Is staff friendly, respectful and personable?	☐	☐

What is the staff ratio?

What is the staff turnover rate?

What is the staffing level on weekdays, weekends and evenings?

How does staff handle behaviors such as wandering and agitation?

What type of training has the staff received about Alzheimer's disease and dementia?

Who has trained the staff?

Contract and fees

What is the monthly fee and what does that include? (Ask to see the "resident" or "service" agreement.)

What services are covered under each plan? If a service is not covered, what is the fee for that service?

Contract and fees (Continued)

Plan type #1
Cost and services offered

Plan type #2
Cost and services offered

Plan type #3
Cost and services offered

How often are monthly fees increased, for what reasons, and how much notification is given?

What happens if someone can no longer cover their monthly fees?

What would make the facility discharge a resident?

	Yes	No
Is there a waiting list?	☐	☐

What dispute procedures are in place?

Check with local regulatory agencies and the Better Business Bureau to confirm compliance and see if any complaints have been filed.

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