

PA CareKit

Choosing to move someone you care for into long-term care can be difficult. We must think carefully about their needs, preferences, and well-being. This way, we can ensure they get quality care. You may feel uncertain about what questions to ask or how to compare different options. Guilt and doubt are normal feelings. However, getting the right information can help you make a confident choice.

Before choosing a facility, visit those you are considering. Watching staff with residents, talking to families, and checking care quality and payment choices can give useful insights. Visit at different times, like evenings and weekends. Staffing levels may change then. Include the person you care for in the visits. This helps you see how comfortable they are and addresses any worries.

This worksheet is designed to help facilitate open conversations and thoughtful decision-making. It gives important questions to think about as you and the person you care for check out long-term care options. Working through these questions together helps you assess priorities. This way, you can ensure the chosen facility meets both care needs and quality-of-life expectations.

Residential Care Options

There are different options for long-term care placement. By understanding the distinctions between these settings, you can better evaluate which type of care setting aligns with the needs of the person you are caring for.

Personal Care Homes: Designed to provide safe, comfortable and supportive residential settings for adults who do not require skilled nursing services, but who do require assistance or supervision with activities of daily living, instrumental activities of daily living, or both.

Assisted Living Facilities: A long-term care alternative to allow individuals to age in place. Residents will receive the assistance they need to age in place and develop and maintain maximum independence, exercise decision-making and personal choice. Assisted Living Facilities are paid completely out-of-pocket.

Skilled Nursing Facility (SNF): Nursing homes or facilities offering full-time medical care and rehabilitative services for individuals with significant health needs. Many rehabilitation centers are connected to SNFs. Nursing homes receive star ratings that enable you to see the quality and staffing ratings and the previous survey results.

This worksheet can generally be applied to any of these settings. Each type is regulated in its own way. They provide different levels of care and have varying requirements. Facility comparisons should only be made within the same category. For example, you can compare one personal care home to another, but not a personal care home to a skilled nursing facility.





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Make Observations and Ask Questions

Facility Name:
Date of Visit:
General Facility Impressions
Observe the overall cleanliness, organization, and upkeep of the facility, including hallways, resident rooms, and common areas. Take note of any strong odors, excessive noise, or signs of neglect.
☐ Do residents appear clean, well-groomed, and well-fed? Do they seem alert, happy, and comfortable in their environment?
Observe how staff interact with residents. Are they respectful, engaged, and warm? Do staff members seen comfortable with one another and with administration?
☐ Do resident rooms reflect their individuality? Are residents seated comfortably in common areas?
☐ Does the administrator seem to know the residents and engage with them?
Request a full tour, including common areas, dining spaces, outdoor areas, and resident rooms.
Notes:





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Meals & Dining

Ask for a sample menu and observe a meal. Does the food look appetizing and nutritious? Are residents eating most of their food?
Are dietary restrictions and preferences accommodated?
Ask about dining schedules and whether snacks are available throughout the day.
Can residents eat in their rooms if needed?
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Living Spaces & Amenities

Observe the size, cleanliness, and accessibility of the living spaces.
☐ Are rooms private or shared?
☐ Do they have individual temperature controls, kitchens, or private bathrooms?
☐ Can residents bring personal furnishings and items?
☐ What laundry and housekeeping services are included?
Review the activities calendar. Are there a variety of options for different interests and abilities?
Observe an activity in progress. Are residents engaged and enjoying themselves? Ask about outings, holiday events, and family involvement.
☐ Are religious services, exercise programs, or therapy animals available?
☐ Is transportation provided for medical appointments or personal outings? What are the costs, limitations, and accessibility options?
☐ Do amenities like laundry, cable, internet, or physical therapy cost extra?
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Resident Rights & Family Involvement

	☐ How does the facility support independence while providing necessary care? Can residents come and go freely, or are there restrictions?
	☐ What are the residents' rights? Are they provided in writing?
	☐ How are complaints or grievances handled? Is the process documented? Are family/staff conferences available to resolve issues?
	☐ Is the facility licensed and in good standing? Ask about the most recent inspection results and any violations.
	☐ How are transitions to higher levels of care managed? Under what circumstances might a resident be transferred or discharged?
	☐ Are physical or chemical restraints used? What measures are in place to prevent their use?
	☐ How are families informed about residents' well-being? Are there regular family meetings or conferences? What opportunities exist for family involvement in care planning and events?
	Are there set visiting hours? Are overnight stays allowed?
	☐ Is there a resident or family council? Can you contact its leaders?
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Cost, Contracts, and Financial Considerations

☐ The contract is a legally binding document that may involve significant financial obligations. Consult an elder law attorney before signing.
Request a detailed breakdown of all costs, including base fees, additional services, and potential rate increases.
☐ What initial payments are required? Are any refundable? If so, when are refunds available?
☐ What are the payment options (monthly, yearly, etc.)? When and why can fees change? How much notice is provided?
☐ What happens if a resident runs out of money? Is financial assistance available? Is renters' insurance required or included?
☐ If a resident is away for hospitalization or other reasons, what fees still apply?
☐ Who is responsible for cleaning, repairs, or replacement if property (resident's or facility's) is damaged?
☐ Is renters' insurance included? Do we need to purchase renter's insurance?
Does the contract specify refund policies for transfers, discharges, changes in ownership, or facility closures?
☐ Does the contract clearly outline the rights and responsibilities of both parties? Are behavioral conditions or other circumstances that may result in discharge explained?
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Personal Care & Health Services

☐ How are residents' care needs assessed? What are the qualifications of the assessor? How often is reassessment conducted?
☐ How is individualized care provided? Can residents' schedules for bathing, dressing, and daily activities be adjusted to their preferences?
☐ How does the facility support residents in maintaining independence in toileting, dressing, and eating?
☐ How often do residents receive assistance with toileting? If disposable briefs are used, how often are they changed?
☐ How frequently are residents' rooms cleaned? Is there a schedule for staff to check on residents' whereabouts and well-being?
☐ How does the facility handle difficult behaviors?
What specific medical services are available (e.g., medication management, diabetes care, physical therapy, wound care, hospice, social work, podiatry)? What is covered by the facility vs. outside providers, and what are the costs?
☐ Is a nurse on staff? What are their hours and responsibilities? Who is responsible when the nurse is not on duty?
Are doctors available on-site? How often do they see residents? What happens when a resident does not feel well?
☐ To what extent does the facility monitor residents' health?
☐ How are medical emergencies handled? When and under what circumstances does the facility notify families or healthcare providers?
☐ How does the facility accommodate residents with increasing care needs? Can they age in place?
☐ How are medications administered, and by whom?
☐ How does the facility ensure residents receive the correct medication on time?
☐ What are the procedures for reviewing medication management, and who oversees this?
Are residents required to use a specific pharmacy or can they use an outside provider? What are the costs?



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nd-of-Life & Transition Planning	ø		
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☐ How does the facility handle end-of-life	care? Do they work with hos	pice providers?	
What happens if a resident's care needs	exceed what the facility can r	provide?	
What is the process for transitioning to	a skilled nursing facility if nee	eded?	
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Staffing & Training

☐ Observe staff demeanor.
☐ Do staff appear rushed, overwhelmed, or engaged with residents?
Do staff respond quickly and kindly to call lights and residents calling out?
☐ Are staff patient and attentive when assisting residents?
☐ Are staff permanently assigned to residents, or are temporary staffing agencies used?
☐ How many staff members are on each shift, and what are their responsibilities?
☐ Does each shift have enough staff to provide quality care?
☐ What is the staff-to-resident ratio?
☐ What other duties do direct care staff have?
☐ Do staff enjoy their work? Are their input and ideas valued by supervisors?
☐ What efforts does the facility make to encourage employee retention and continuity?
☐ What is the staff turnover rate?
☐ What training and certifications do staff members have? What are the trainer's qualifications?
Are staff specially trained to support residents with dementia, including those with challenging behaviors or wandering tendencies?
☐ How do staff learn to assist residents who struggle with communication?
☐ Are there staff members who speak the resident's native language?
☐ What happens if a resident does not get along with their assigned staff member?
Notes:





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Safety, Security, and Emergencies

☐ What is the protocol in the event of an emergency? Are there written policies?
☐ What kinds of emergencies are staff expected to handle and how are they trained for them?
☐ Are there emergency response plans for fires, natural disasters, and medical emergencies?
☐ Does the facility have security measures like cameras, locked doors, and visitor check-ins?
Observe if the building has safety features such as grab bars, non-slip flooring, and emergency call buttons in rooms.
☐ What are the infection control protocols, especially for flu outbreaks and COVID-19?
Notes:





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Meet with a Resident or Family

☐ Are residents treated with respect and kindness?
☐ Are residents helped with meals?
Does the facility respect the resident's wishes about their schedule (bedtime, baths, meals)?
☐ Is attention given to residents at night if awake? Is there anything for them to do?
☐ Does the resident have the same nursing assistant most days?
☐ Is there a family or resident council? If so, is the council led independently by families or residents or is it directed by staff members?
☐ Are staff responsive to resident requests? Do they assist the resident with toileting?
☐ Are snacks always available to residents? Fresh fruit?
☐ Do residents participate in care planning conferences? Are his or her opinions valued?
☐ Has the resident had missing possessions?
☐ Who handles resident or family member concerns? Is that person responsive?
☐ Does the resident get outside for fresh air or activities as much as they want?
☐ What is the best thing about living in the home?
☐ What is the worst thing about living in the home?
Notes:





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Making Your Decision

Compare notes from multiple facility visits.	
Speak with current residents and their families if possible.	
Trust your instincts.	
Choose a facility where you feel confident about your loved one's care and well-being.	
Notes:	
Source: claritylegalgroup.com Paid for with Pennsylvania Taxpa	yer Dollars.

