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# SENIOR FACILITY EVALUATION

Works For All Senior Facilities

### Shortcut:

If you don't have the time, some Super Agers focus on unannounced visits and great social media recommendations. Unannounced visits allow you to see a facility when they're least prepared, especially if you visit on a Monday morning or Saturday evening. Most facilities that really believe in what they do and how they operate will actively engage with social media. Please note that senior facilities, in general, are hard to manage and operate. So most are not stellar. If you want the very best knowledge into what you or your loved one is likely to experience, you need to do the research below.

Once you've narrowed to your top or top two facility options, use this worksheet to work through all the details. There may be some areas that don't apply to the facility, but it is worth asking the questions if at all relevant. Often times, you or your loved one may decline over time. So an assisted living facility that can handle a few ADL's like help with bathing and grooming may be able to provide future services.

<b>1</b> Gather Public Information	<b>2</b> ADLs & IADLs Addressable	<b>3</b> Medical & Medical Related Services	<b>4</b> Non Medical Services
State License Certifications Medicare Reviews Yelp / Social Media / Other Reviews	ADLs Addressed IADLs Addressed	Health Planning Medical Services Medical Related Services	Activities Amenities
<b>5</b> Staff	<b>6</b> Facility	<b>7</b> Overall Convenience	<b>8</b> Pricing
Training Numbers Security	Review	Review	Basic Numbers

1 Gather Public Information	Results & Notes
<p>1. Ownership &amp; History</p> <p><i>A. When did it open</i></p> <p><i>B. Who owns facility</i></p>	
<p>2. Licensing</p> <p>Most states require a facility providing care to seniors to be licensed. Usually, the license and review are public documents. If the review is not public, remediation plans usually are available.</p> <p><i>A. Get and review the license</i></p> <p><i>B. Review plans of remediation</i></p>	
<p>3. Certification(s)</p> <p>Some states require senior facilities or their staff to maintain certifications. Some facilities obtain or have their staff obtain certifications.</p> <p><i>A. Get and review any available certifications</i></p> <p><i>B. Review plans to obtain certification</i></p> <p><i>C. Review plans of remediation</i></p>	
<p>4. Rating Systems</p> <p>Rating systems rely on some kind of “objective” criteria. Are there any rating systems that the facility is subject to, or any they participate in?. Medicare and Medicaid approved nursing homes are subject Five-Star Quality Rating System</p> <p><i>A. Get ratings criteria and review</i></p>	
<p>5. Social Media Reviews</p> <p>Relies on its user’s opinion. May not be many reviews on social media. Often reviews are made when someone is very upset or elated. The extremes of an opinion.</p> <p><i>A. Look up the facility on social media</i></p> <p><i>B. Ask facility to address bad reviews</i></p>	
<p>6. Community Opinions</p> <p>Faith-based organizations, friends, and people at senior centers have knowledge about nearby senior housing options.</p> <p><i>A. Ask the community</i></p> <p><i>B. Visit a nearby Board &amp; Care facility that’s been around awhile and ask them their opinion</i></p>	

## 2. ADL & IADL Services Offered

CarePlanIt works around a simple framework. The framework helps identify and address all senior issues. Health is a key part of the framework, and reviewed as their manifestation in ADLs and IADLs.

If you or a loved one can't drive, you'll need a ride to where you're going. If you can't use the toilet yourself, you'll need help. All senior facilities that offer care need to address one or more ADL and IADLs. You need to know what your facility can address.

Even when evaluating Senior Day Care, it's important to know if they help attendees with incontinence, making phone calls, medications, transportation and eating.

ADL Services Offered / Addressed	Results & Notes
1. Walking – mobility <i>How do they address mobility issues?</i>	
2. Transferring – mobility <i>How do they transfer? Any body lifts, lift chairs, transfer wheelchairs? How many?</i>	
3. Toileting – incontinence <i>How is incontinence addressed? Any time requirements to reach a resident that needs toileting assistance?</i>	
4. Bathing <i>How is bathing addressed? What do their bathing and showering facilities look like? Do they use same-sex helpers?</i>	
5. Dressing & Grooming <i>Is there dressing and grooming assistance available? What is the assistance? Do they use same-sex helpers?</i>	
6. Eating <i>How is eating assistance addressed?</i>	

IADL Services Offered / Addressed	Yes/No (notes on how service provided)
1. Phones & Computer <i>Do they help with phone use? Do they offer computers? Any sight assisting devices?</i>	
2. Shopping <i>Do they offer shopping assistance? Do they support delivery services?</i>	
3. Food <u>Dining</u> <i>offer to the Resid in the the r</i>	
4. Home <i>Are h the p</i>	
5. Laundry <i>Are la when</i>	
6. Driving <u>Own</u> vehicle <u>Facil</u> trans prot Near stop trans facili	
7. Medication <i>Are t phar</i>	
8. Financial <i>Are t they</i>	

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