

## Continuing Care Retirement Community (CCRC) – Administrative Checklist

Take this handy guide with you when you speak to the community relations or management staff. Asking the right questions upfront will help you make a more informed decision about the right continuing care retirement community for you.

Some of the questions below will apply to certain care levels within the community only. For each section, we've added an abbreviation for the care levels to which the responses may apply: SNF= Skilled Nursing Facility, AL= Assisted Living, IL= Independent Living, or All.

### Community Information (All)

Community Name:	Contact:
E-Mail:	Phone:

Ownership Information (All)	Yes	No	Notes
Is this CCRC part of a larger corporation that operates multiple CCRCs or is it a single-owned community?	<input type="checkbox"/>	<input type="checkbox"/>	
Is this CCRC a non-profit corporation?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a sponsoring organization?	<input type="checkbox"/>	<input type="checkbox"/>	
Does this CCRC have plans to expand through acquisition or new construction?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a governing board?	<input type="checkbox"/>	<input type="checkbox"/>	

Financial Performance (All)	Yes	No	Notes
Have you reviewed the most recent annual financial statements? Including the statement of cash flow, financial position and operations?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the CCRC have a positive net worth?	<input type="checkbox"/>	<input type="checkbox"/>	
Does this CCRC garner income from donations, endowments and/or investments?	<input type="checkbox"/>	<input type="checkbox"/>	

License & Certifications (All)	Yes	No	Notes
What licenses does the community hold? List:			
Does the community have additional certifications or accreditations? (CARF-CCAC) List:	<input type="checkbox"/>	<input type="checkbox"/>	
Have you reviewed the last state inspection report?	<input type="checkbox"/>	<input type="checkbox"/>	
Have there been any stop placements in the last 3 years?	<input type="checkbox"/>	<input type="checkbox"/>	
Is staff provided with continuing education? How often?	<input type="checkbox"/>	<input type="checkbox"/>	
What certifications does the staff hold? List:			

<b>Healthcare &amp; Medication</b> (SNF, AL)	Yes	No	Notes
Is there an on-call physician, nurse practitioner or physician's assistant?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a written care plan for each resident?	<input type="checkbox"/>	<input type="checkbox"/>	
Can family, staff and the primary physician participate in designing the care plan?	<input type="checkbox"/>	<input type="checkbox"/>	
How often are resident needs re-assessed?	<input type="checkbox"/>	<input type="checkbox"/>	Timeframe:
Is self-administration of medication allowed?	<input type="checkbox"/>	<input type="checkbox"/>	
What is the policy for responding to a resident's medical emergency?			
What is the policy on medication storage, dispensing and record keeping?			
Is there a dedicated memory care program on campus?	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Meals</b> (All)	Yes	No	Notes
Are special diets accommodated? (low-sodium, low-sugar, ethnic)	<input type="checkbox"/>	<input type="checkbox"/>	
Are meals available anytime or are they only offered on a set schedule?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have input into meal planning?	<input type="checkbox"/>	<input type="checkbox"/>	
Do residents have a choice of foods for each meal?	<input type="checkbox"/>	<input type="checkbox"/>	
Are healthy snacks available at all times?	<input type="checkbox"/>	<input type="checkbox"/>	
What meal plans are available? List:	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Social &amp; Wellness Activities</b> (All)	Yes	No	Notes
Is there a monthly activities calendar published and posted?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the community have a volunteer program?	<input type="checkbox"/>	<input type="checkbox"/>	
Does the community have a good reputation in the surrounding community?	<input type="checkbox"/>	<input type="checkbox"/>	
Do the fitness offerings accommodate varying abilities?	<input type="checkbox"/>	<input type="checkbox"/>	
What are the fitness and exercise offerings? List:			
What social activities are offered? List:			
Do the activities offered cater to your interests?	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Personal Services (All)</b>	Yes	No	Notes
May the resident hire outside home care and/or home health providers to provide services in the community?	<input type="checkbox"/>	<input type="checkbox"/>	
What services are available?			
• Assistance with activities of daily living	<input type="checkbox"/>	<input type="checkbox"/>	
• Medication management	<input type="checkbox"/>	<input type="checkbox"/>	
• Foot care	<input type="checkbox"/>	<input type="checkbox"/>	
• Laundry service	<input type="checkbox"/>	<input type="checkbox"/>	
• Massage therapy	<input type="checkbox"/>	<input type="checkbox"/>	
• Travel Agent	<input type="checkbox"/>	<input type="checkbox"/>	
• Other Services? List:			

<b>Transportation (All)</b>	Yes	No	Notes
Is transportation available for specific appointments?	<input type="checkbox"/>	<input type="checkbox"/>	
If yes, what is the schedule?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there any limitations?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there guest parking?	<input type="checkbox"/>	<input type="checkbox"/>	
Are there dedicated resident parking spots?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there an additional cost to use the community van or car?	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Pets</b>	Yes	No	Notes
Are pets allowed?	<input type="checkbox"/>	<input type="checkbox"/>	
If so, what types?			
What is the pet deposit amount, if any?			
Are there provisions if the resident goes on vacation or has to be hospitalized?	<input type="checkbox"/>	<input type="checkbox"/>	

<b>Security &amp; Safety (All)</b>	Yes	No	Notes
Does staff undergo a background check? Which staff? What type? (driver's license, criminal, national or state)	<input type="checkbox"/>	<input type="checkbox"/>	
Are security guards available 24/7?	<input type="checkbox"/>	<input type="checkbox"/>	
Is there a personal response system available in each apartment?	<input type="checkbox"/>	<input type="checkbox"/>	
What policies are in place to protect the personal property of each resident?			

Policies & Cost (All)	Notes
What are the contract options available?	
What are the entrance fees?	
What are the policies for refunding entrance or waiting list deposit fees?	
What services are included in the monthly rate? List:	
What additional fees are charged for care, services and supplies?	
What are the billing, payment and credit policies?	
What is the policy for fee increases?	
Under what conditions can a contract be terminated?	
What happens if a resident encounters financial difficulty?	
What are the policies for determining a resident's need to move to another care level?	