

## Consumer Expectations Worksheet

This checklist is designed to help prospective assisted living residents and their families assess and evaluate facilities. It is meant to be a guide to some of the most important issues and not to be an exclusive list of all issues.

### Basic Principles

- Individuals who reside in long-term care facilities should expect to receive appropriate services, be treated with courtesy, and continue to enjoy their basic civil and legal rights.
- Residents should have ample opportunity to exercise reasonable control over life decisions.
- Residents should expect choice, participation, privacy and the opportunity to engage in religious, political, civic, recreational, and other social activities that foster a sense of self-worth and enhance their quality of life.
- Residents should have a safe, clean, comfortable, and homelike environment including the use of personal belongings.
- Residents should expect staff to be trained to assist residents in exercising their rights.

The following are some individual items to ask about. You can choose to check off those items where you determine the facility practice meets the expectation outlined.

### Communication –

- Does the staff communicate with me in a respectful manner?
- Do they speak to directly me even if my family member is in the room?
- Do they address me in a way that I like? !

### Privacy – assurances of – where are my care needs discussed?

- How is medication distributed?
- Is my mail delivered unopened?
- Is there a private place to make phone calls and to have personal conversations in private?

### Personal space – where I can have privacy and count on not being interrupted as when I lived in my own home?

- Is my property is respected?
- Is there a place to lock valuables, and is extra storage available if needed?
- Do staff respect my space and arrangement of my possessions?
- Can I bring my furniture and feel confident that it won't get damaged?
- Personal relationships & visitors – are there barriers to having visits from my legal representative or other health, medical or legal service providers?**
- Can my family and friends visit me and can we have privacy whenever I want without restrictive visiting hours or other barriers?
- Can I make choices about my life that are significant to me? Including what I wear, hair style, or other personal effects according to preference?
- Will they respect my cultural identity and my personal relationships? For example, do they honor Christian and non-Christian holidays, do they provide ethnic foods?

**Community involvement** – are residents and staff involved in the neighborhood and local businesses?  
(For instance – a child care center on site?)

- Can the facility host political forums, community forums, or guest speakers that integrate the facility into the fabric of the neighborhood?

### **Fees**

- What are the fees? Facilities often have a variety of fees which may not be immediately obvious. In addition to fees related to room and board, facilities might charge fees for certain kinds of assistance. Even if you do not need a particular kind of help now, you want to understand what the costs would be if you later needed it. For example, does the facility charge a fee to help me bathe?
- What about to escorting me to dinner? How much?
- Under what circumstances can fees be increased?
- What are the requirements for advance notice?

*Good state laws require facilities to give advance notice of fee increases and may in fact limit the rate at which fees can increase. Your state may not have such protections. Be sure to find out the circumstances under which fees can be raised and how much notice you will be given if a fee increase is proposed. Also find out how much notice is given if the facility says you need more assistance and that they will now charge you more for it.*

### **Refunds of unused pre-paid fees**

- Is there a provision to refund unused fees if I need to move to a different place for more appropriate care?

### **Contracts**

Don't rely on the staff explanation of the contract – if you do not understand the contract contact your ombudsman or legal services. Read the fine print.

- Is the contract written in a way that is clear and understandable?
- If I disagree with parts of the contract – can I cross out those sections and still be admitted to the facility?
- Does the facility require that I sign a pre-dispute arbitration agreement? If so – do not agree to this and consult with legal services and/or your ombudsman.
- If I spend down my resources or savings will the facility accept Medicaid?
- Will they agree to this in writing?

### **Food**

- Can I have a full range of choice of foods and drink?
- Will they prepare foods the way I like them?
- Is there flexibility as to meal times? Can I have snacks when I want?
- Is food and drink easily accessible for me to get on my own just as I would grab a snack at home?
- Are the dining facilities adequately accessible to persons with physical disabilities?
- Are residents assigned to sit in certain areas of the dining room or segregated according to physical or cognitive disability?
- Can I bring food to my room that I haven't finished from a meal in the dining room, and I can have a snack whenever I choose?

**Safety: Personal**

- Do I feel safe at times when staff are providing care to me?
- Do I trust in the abilities of my caregiver?
- Am I comfortable with the person(s) who is providing intimate care?

**Facility**

- Does the staff pay attention to who is coming and going?
- Are doors locked at night?
- Do I have confidence that when I am on the property I am free from harm by others?

**Disaster planning**

- Even for things like when the power goes out in a storm. What is the plan?
- Can I review the survey or inspection results documents?
- Is there any evidence that residents have been abused or neglected?
- Is the phone number to the ombudsman and state licensing prominently posted?
- Does the facility know its ombudsman?

**Protection of resident funds**

- Will I manage my own financial affairs?
- If the facility assists do they hold, safeguard and manage an account for me?
- Can I be assured that they won't co-mingle my funds with other facility funds?

**Care**

- Does the facility fully disclose all the services they will provide, and those they will not provide?
- Am I involved in the initial care plan and do I direct the day to day implementation of this plan?
- Will I have ready access to review my own records?
- Are staff trained to care for my specific needs?
- Will the facility make reasonable accommodation to my changing needs: Hoyer lifts, transfer assistance, service animals, increase assistance with personal care and activities of daily living, assistance with eating?
- Am I free from restraints, including chemical, and such things as being locked in my room?

**Transfer and Discharge rights**

- Are these rights guaranteed in law in my state?
- What criteria does the facility use to issue a discharge notice?
- Do they do this in writing? Verbally? With meaningful notice time period?
- Will they help me with a safe discharge plan and carry it through?

**Activities**

- Do I like the people who live there?
- Would I want to spend free time with them?
- Does the staff offer activities based on my choices?
- Are the fees reasonable for special outings?

## Resident Power

- Are residents involved in making decisions about how the facility operates?
- Is there a formal organization of residents, such as a council?
- Does the facility let the Resident Council meet privately and not insist that staff be present?
- Does the facility take direction from this council?
- Do residents have a say in what staff are hired or fired?
- Does the facility have a grievance system and, if so, what is it?
- Do I have direct access to staff that can make decisions when I have a problem or complaint to be resolved?



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