

ELDERCARE


Choosing a nursing home for a family member can be one of the most difficult decisions you make. Once you have created a list of homes to consider, you may want to make several copies of the following checklist and fill in one for each nursing home you visit.

This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

NURSING HOME CHECKLIST

Nursing home: _____

Address: _____

Phone: _____

Contact: _____

Credentials and overall environment

Is the facility certified by Medicare and Medicaid? Yes No

How long has the facility been certified? _____

Has the facility had stable ownership for some time, with the same administrator and director? Yes No

Is a statement of residents' rights clearly posted? Yes No

Does the facility have an Alzheimer's unit or other special-care area restricted to residents with special-care needs? Yes No

Is this specialty unit separated from other areas of the facility? Yes No

Is the facility well lit, clean, safe and welcoming? Yes No

Location and visiting

Frequent visits generally will improve the resident's mental and emotional well-being and ensure that quality-of-care issues can be addressed as they arise.

Is the facility convenient to the resident's family members and friends? Yes No

What are the visiting hours?

Are family visits welcomed? Yes No

Are there restrictions on visits by children? Yes No

Are family members allowed to take residents out for a day or overnight? Yes No

Are there areas where family and friends can visit privately? Yes No

Is the facility close to the office of the resident's doctor? Yes No

Is the facility convenient to public transportation? Yes No

Mental and emotional well-being

Are mental health services available? Yes No

Are activities planned each day for the residents? Yes No

Are events regularly scheduled? (Ask to look at the schedule.) Yes No

Are there activities for residents who cannot leave their beds? Yes No

Is there a library available for residents, with large-print and audio books? Yes No

Is there a small store for purchasing personal items, such as shaving cream, hair care products and snacks? Yes No

Are residents able to enjoy outdoor areas, such as an enclosed garden? Yes No

Are plants, pets and other natural elements added to the residents' environment? Yes No

Are residents taken to special community events and cultural activities? Yes No

Rooms

Will the resident share a room and/or a bathroom with one or more other residents? Yes No

How are roommates and rooms selected?

If the resident is dissatisfied, can roommates be changed? Yes No

How is this accomplished?

Can the resident bring some of his or her own furniture and decorations? Yes No

Is there enough room to get around between the beds? (Keep in mind whether wheelchairs must be maneuvered.) Yes No

Are nurse and emergency call buttons within easy reach of bed, toilet and bath? Yes No

Care plan

Individual care plans must be implemented for each resident.

How often is the care plan reviewed and changed?

What is the protocol for handling problems?

Are there regular fire drills? Yes No

What bathing facilities are available, and how is bathing handled when the person needs assistance?

Nursing home employees

How are employees selected?

Are employees screened for drug use, criminal records or other potential problems? Yes No

What is the turnover rate for skilled employees?

Nursing home employees (continued)

What is the turnover rate for employees who perform ancillary services, such as meal preparation and financial recordkeeping?

Are registered nurses or licensed practical nurses on duty at all times? Yes No

Is a social worker on staff? Yes No

What is the ratio of staff to residents during each shift?
(Ideally, a facility will have one nurse's aide for every five or six residents between 7 a.m. and 11 p.m.)

Does the staff treat residents with respect? Yes No

Can you talk privately to residents to ask what they think of the facility? Yes No

Are staff members available to talk if you have a question about a loved one's care? Yes No

Medical care

Is there a physician used by the majority of residents? Yes No

What are his or her qualifications?

How often is the doctor on the premises?

Does the doctor have a good bedside manner with residents? Yes No

May residents consult their personal physicians if they choose? Yes No

Are there arrangements with a nearby hospital in the event of a medical emergency? Yes No

What diagnostic treatment facilities are available at the facility?

Meals

Are meals served in a communal dining room or brought to each resident's room?

If meals are served in a communal dining room, how are tables assigned?

How long does it take for a meal to be delivered to a bedridden resident?

How does the food taste, and how is it presented to the resident?

Can you stay for a meal? (This will help you gauge the quality of the food service.) Yes No

Ask for a sample menu.

Are there special meals for the holidays? Yes No

Admission requirements

What financial information will the facility require during the admissions process?

Can the resident or his or her representative have copies of all admissions documents and contracts for review in advance? Yes No

How long does the admissions process take?

Cost of care

What is included in the cost of care?

How are extra items billed?

Can laundry be taken off premises? Yes No

Does this save the resident some costs? Yes No

How are prescription drugs handled?

What is the cost difference between a private and a semiprivate room?

ELDERCARE

Transportation services

If required nonemergency medical services (such as dialysis) are not available on the premises, how is transportation arranged?

What about transportation to other places, such as local stores and religious services?

Resources

On the Internet or by phone

AARP

www.aarp.org

1-888-OUR-AARP (1-888-687-2277)

Eldercare Locator

www.eldercare.acl.gov

1-800-677-1116

Family Caregiver Alliance

www.caregiver.org

1-800-445-8106

National Caregiving Foundation

www.caregivingfoundation.org

1-800-930-1357

Leading Age

www.leadingage.org

1-202-783-2242

Contact your financial advisor for more information or visit mfs.com.

MFS® does not provide legal, tax, or accounting advice. Any statement contained in this communication (including any attachments) concerning U.S. tax matters was not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code. This communication was written to support the promotion or marketing of the transaction(s) or matter(s) addressed. Clients of MFS should obtain their own independent tax and legal advice based on their particular circumstances.