



TOUR QUESTIONNAIRE

DATE _____
 COMMUNITY NAME _____
 COMMUNITY ADDRESS _____
 TOUR CONTACT + EMAIL _____

COMPLETE THE FORM BELOW ON YOUR TOUR

Monthly rental rate or base rate? _____

Deposit Amount _____

Community Fee _____

Move-in incentives _____

Second Person Fee _____

Pet fee and restrictions _____

Smoking allowed

On-Property Off-Property

How does the facility charge for care?

Fee For Service Level of Care

Ask the facility for a list of their care fees.

Did they provide you with one? Yes No

SERVICE INCLUDED IN MONTHLY RENTAL/BASE RATE

Housekeeping _____ x per DAY / WEEK / MONTH

Garbage removal _____ x per DAY / WEEK / MONTH

Wash sheet and make bed
_____ x per DAY / WEEK / MONTH

Towels washed _____ x per DAY / WEEK / MONTH

Personal laundry ____ loads per DAY / WEEK / MONTH

Meals _____ x per day

Emergency response system Yes No

Wanderguard Yes No

Memory Care

Delayed Egress Locks Yes No

WHAT UTILITIES ARE INCLUDED

- Gas Garbage
- Heat Water
- Air conditioning Basic Cable
- Electric Internet
- WiFi

IS TRANSPORTATION INCLUDED?

Bus Car or sedan Van

Is there a lift? Yes No

Every person is unique and may have a personal care plan created for their specific assistance needs. In the senior living industry, there are some basic care services called "Activities of Daily Living" or "ADL's".

Will care be provided for activities of daily living (ADL's) in the monthly rental rate?

- Yes No Morning routine
- Medication management Bedtime routine
- Bathing Well checks
- Dressing Toileting
- Un-dressing Escort to meals/activities

Mobility Assistance

Transfers to: Bed Chair Toilet

Lift assist: 1 person 2 person

- Hoyer Bed Rails Gate Belts
- Trapeze Transfer Poles



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NEED TO KNOW QUESTIONS

PAY POLICIES

Are move-in fees refundable?
 Yes No How Much? _____

When is the first rent payment due and is it different than the move-in date?

If the resident does not spend the night at the community due to medical or personal reasons, would care fees still apply?
 Yes No

If the resident does not spend the night at the community, will financial assistance from an outside entity cover care fees?
(ie, long term care insurance, VA benefits, Medicare, Medicaid)
 Yes No

If the outside entity does not pay, will I be personally financially responsible for the care fees? Yes No

If the outside entity does not pay, will I be personally financially responsible for the rental rate? Yes No

GUEST POLICIES

May I have an overnight guest in my unit?
 Is there a fee? How long can they stay?

Is there a guest or hospitality unit?
 Is there a fee? How long can they stay?

CHANGES IN FEES AND RATES

How often should I anticipate care fees to be changed or increased and how will I be notified?

If the monthly rental rate is changed or increased, when and how will I be informed?

When should I expect the monthly rental rate to be increased?

DON'T FORGET...

- Request to see the community's state licensing surveys and reports (if they are a licensed community)
- Request floor plans with pricing for the unit(s)
- Request the following:
 - Community newsletter
 - Current monthly activity calendar
 - A sample dining menu
 - A transportation schedule