

FAMILY GUIDE

Tour Preparation Checklist

Use this guide to prepare for a visit, capture observations, and compare prospective Assisted Living homes side by side.

Before your tour

Bring with you:

- A short summary of your loved one's daily routine and care needs
- Current medication list, including supplements and allergies
- Recent medical or hospital discharge summaries (if available)
- Contact information for the primary care provider and case manager
- Notes on cultural, dietary, or faith-based preferences

Questions to ask the team

1. What is the staffing ratio during day, evening, and overnight shifts?
2. Are caregivers awake and on-site overnight?
3. How are medications administered and documented?
4. How is a service plan built, reviewed, and updated?
5. How are families notified about changes in condition, falls, or hospitalizations?
6. What training do staff receive in dementia care, transfers, and infection control?
7. How do you accommodate cultural, dietary, or religious preferences?
8. What is the process if care needs change over time?
9. What is included in the base rate, and what services carry additional fees?
10. How are concerns or grievances handled?

What to look for during your visit

- Residents appear clean, comfortable, and engaged
- Common areas are tidy, well-lit, and feel welcoming
- Staff greet residents by name and interact warmly
- The home is calm — neither chaotic nor unusually quiet
- There is access to outdoor space, natural light, and privacy
- Bathrooms and bedrooms feel safe and dignified
- Mealtime feels social and unrushed
- You are introduced to leadership, not just the tour guide

Notes from your visit

Date of visit

Staff you met

First impression

Questions
answered well

Open questions

Next step

Need help arranging a tour?

Call us at **(612) 555-0123** or email **hello@serenityoaksmn.com**. Private tours are available seven days a week by appointment.