

Senior Living Visit *Planner*

Choosing the right senior living community can feel overwhelming—this planner is here to help you stay organized, ask the right questions, and feel confident you’re making the best decision for someone you love.

Use it as your guide during tours or phone calls to keep everything in one place.

BEFORE YOU GO: PREP SHEET

My Top Priorities:

- | | |
|---|--|
| ☐ Location close to family | ☐ Affordable cost |
| ☐ Strong medical support | ☐ Engaging activities |
| ☐ Safe and clean facility | ☐ Other: _____ |
| ☐ Warm community feel | |

Questions I Want to Remember to Ask:

1. _____
2. _____
3. _____

Communities I'm Visiting:

1. _____
2. _____
3. _____

COMMUNITY SNAPSHOT: QUICK COMPARISON

(Fill this once for all 3 communities)

Criteria	Community 1	Community 2	Community 3
Distance from family			
Type of care offered			
Monthly cost range			
Meals included? (Y/N)			
Private rooms available? (Y/N)			
Pet-friendly? (Y/N)			
Visitor policy			
Activities calendar shared? (Y/N)			
Staff friendliness (Y/N)			
Overall Atmosphere (Circle 1 – 5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

SECTION 1: CARE & MEDICAL SUPPORT

Ask About:

- ☐ Personalized care plans
- ☐ 24/7 nurse or on-call doctor
- ☐ Medication management
- ☐ Emergency response systems
- ☐ Support as care needs change

Criteria	Community 1	Community 2	Community 3
Personalized care plan available	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
24/7 nurse or doctor on-site/on-call	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Medication management offered	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Emergency call system in rooms	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Can transition to higher care later	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
First Impression (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

SECTION 2: LIVING SPACES & AMENITIES

Ask About:

- ☐ Cleanliness
- ☐ Private bathrooms
- ☐ Room personalization allowed
- ☐ Accessibility features
- ☐ Beauty salon, laundry, common spaces

Criteria	Community 1	Community 2	Community 3
Overall cleanliness (1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Private bathrooms available	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Furnishing personalization allowed	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Accessible (ramps, elevators, etc.)	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Common areas (salon, laundry, etc.)	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
First Impression (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

SECTION 3: ACTIVITIES & DINING

Ask About:

- ☐ Social + fitness programs
- ☐ Dining hours and options
- ☐ Special diets
- ☐ Family events

Criteria	Community 1	Community 2	Community 3
Daily activities available	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Fitness / wellness programs	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Flexible dining options	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Special dietary accommodations	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Family events or open invitations	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
First Impression (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

SECTION 4: COST & FINANCIAL CLARITY

Ask About:

- ☐ Base monthly cost
- ☐ Extra fees
- ☐ Accepted insurance/VA benefits
- ☐ Deposit or move-in fees

Criteria	Community 1	Community 2	Community 3
Base monthly rate explained	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Extra fees disclosed	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Accepts VA, Medicaid, LTC insurance	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Move-in or deposit fees explained	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Overall value (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

SECTION 5: FAMILY INVOLVEMENT

Ask About:

- ☐ Family updates and communication
- ☐ Visitation flexibility
- ☐ Involvement in care planning
- ☐ Family-friendly events

Criteria	Community 1	Community 2	Community 3
Family receives regular updates	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Families included in care planning	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Flexible visitation policy	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Special family-friendly events hosted	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Family support groups or resources offered	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
First Impression (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

FINAL NOTES & NEXT STEPS

Summary Criteria	Community 1	Community 2	Community 3
Overall Fit (circle 1–5)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Would you feel confident here?	☐ Yes ☐ No ☐ Maybe	☐ Yes ☐ No ☐ Maybe	☐ Yes ☐ No ☐ Maybe

Top Choice:

Runner-Up:

Next Steps:

- ☐ Request a sample contract
- ☐ Schedule second visit
- ☐ Confirm availability
- ☐ Review insurance coverage
- ☐ Discuss with family
- ☐ Begin move-in process