



The Tour Kit

What to ask, what to notice, and what to compare when you visit.

Who this is for _____

Communities we are visiting _____

Started on _____

Before you go

HOW TO USE THIS

Take one copy per community. Fill it in while you are there, or in the car immediately after. Every tour blurs into the last one by the third visit, and the details you are sure you will remember are the ones you will not.

Bring someone with you. Two people notice different things, and one of you can keep the conversation going while the other looks around.

Eat a meal if they offer one. Take the offer even if you are not hungry. Food quality is one of the few things you can evaluate directly, and it is a daily reality for whoever lives there.

QUESTIONS TO ASK ON THE PHONE FIRST

Do you have availability now, or is there a waitlist? How long?

What is the base monthly rate, and what does it include?

How is care priced on top of that? Levels, points, or à la carte?

What would someone with these specific needs likely cost, all in?

What is the community fee or deposit, and is any of it refundable?

Do you accept Medicaid? Under what conditions, and after how long as a private payer?

Can you handle these needs today, and what would happen if they increased?

When was your last state inspection?

Estimate what care should cost in your area
zenblis.com/calculator



What to notice

Fill this in while walking. These are judgments, not yes or no.

WHEN YOU ARRIVE

What it smells like

Whether anyone greeted you, and how long it took

Condition of the entry, hallways, and common areas

Whether the building feels lived in or staged

THE PEOPLE

Are residents out of their rooms and engaged, or parked in a hallway

Does staff greet residents by name

How residents look: dressed, groomed, glasses on, hearing aids in

Whether anyone is calling for help, and what happens next

THE PLACE

Time a call light if you can, discreetly. Note how long it took.

Look at a room that is not on the tour route

Read the posted activity calendar, then look for the activity actually happening

Check the dining room during a meal, not between meals

Outdoor space, and whether residents can reach it on their own

Trust what you notice. A tour is a sales presentation, and the things nobody planned for you to see are the most reliable information you will get.

What to ask

STAFFING

How many caregivers are on during the day, evening, and overnight shift?

How many residents does each caregiver support on each of those shifts?

Is a licensed nurse on site around the clock, or on call?

What was your caregiver turnover in the last twelve months?

How often do you use agency or temp staff?

MONEY

What triggers a rate increase, and how much notice do we get?

How much have rates risen in each of the last three years?

What is not included in the price?

CARE

Who assesses care needs, how often, and what triggers a reassessment?

Who administers medications, and what training do they have?

What happens if needs increase beyond what you provide?

How do you handle a fall, and how do you tell families?

LIVING THERE

What does a typical day look like for someone at this level of care?

How do you handle someone who does not want to participate?

What are visiting hours, and can we take them out?

How do families raise a concern, and who owns it?

Questions that change by care type

IF THIS IS ASSISTED LIVING

How do you decide someone needs more care than you can give?

What is the difference between your care levels, in practice?

Who helps with bathing, and how often is it offered?

IF THIS IS MEMORY CARE

What is your staff training in dementia care, and how many hours?

How is the space secured, and can residents go outside safely?

What do you do when someone is agitated, before medication is considered?

How do you handle wandering, exit-seeking, and sundowning?

What is the ratio overnight?

IF THIS IS SKILLED NURSING OR REHABILITATION

What is your CMS star rating, and what drove it?

How many therapy hours per day, and on weekends?

What percentage of rehab patients go home?

Are you accepting Medicare and Medicaid for this stay?

IF THIS IS IN-HOME CARE

Are caregivers your employees or contractors, and who handles taxes and insurance?

Who covers when the regular caregiver calls out?

What background checks do you run, and how often?

Who supervises, and how often do they visit the home?

Reading the inspection report

WHY THE INFORMATION IS UNEVEN

Skilled nursing facilities are surveyed under federal rules. Every one in the country carries a star rating and a public record of its citations.

Assisted living and memory care are licensed by the state instead. What gets inspected, how often, and how much is published varies enormously from one state to the next. Some states post full reports online. Some make you file a request.

This matters when you are comparing a nursing home against an assisted living community. You are not looking at the same quality of information, and the community with fewer published findings is not necessarily the better one. It may just be in a state that publishes less.

WHAT A CITATION MEANS

Findings are graded on two axes. Scope is how many residents were affected: isolated, a pattern, or widespread. Severity is how bad the outcome was, from a paperwork problem up to immediate jeopardy.

Letters A through C are administrative, with no harm and little potential for it. D through F means no actual harm occurred but the potential was more than minimal. G through I means actual harm happened. J through L means immediate jeopardy, the most serious category.

Almost every facility has citations. A page with none is unusual enough to ask about. What you are looking for is severity and repetition.

WHAT TO LOOK FOR

Anything at G or above

The same finding repeating across multiple years

Findings about staffing levels, medication errors, or falls

How quickly the plan of correction was completed

Complaint investigations, which are listed separately from routine surveys

Community	Star rating	Last survey date	Most serious finding	Repeated from a prior year	Their explanation



Look up any community's rating and inspection findings

zenblis.com/search

Ratings and inspection findings for every community in our directory are on Zenblis, free and without an account.

Comparison worksheet: the facts

Continues on the next page with what you observed.

	Community A	Community B	Community C
Name			
Care type			
Distance from family			
Base monthly rate			
Care level fees			
Community fee or deposit			
Refundable			
What is included			
What costs extra			
Room type and size			
Availability or waitlist			
Accepts Medicaid			
Date toured			

Comparison worksheet: the judgment

	Community A	Community B	Community C
Day shift ratio			
Overnight ratio			
Nurse on site 24 hours			
Turnover last 12 months			
Last survey findings			
Meal impression			
Activity impression			
How staff spoke to residents			
Contract concerns			
What worried you			
What reassured you			
Could they stay here as needs grow			
Gut feeling, 1 to 5			



Find and compare communities near you

zenblis.com/search

Comparing more than three? Print another copy.

Before you sign

This is general information, not legal advice. Residency agreements are binding contracts, often thirty pages or more, and they are written by the community's lawyers. Have an attorney read one before you sign it. An hour of an elder law attorney's time costs far less than one month of care.

☐ **Arbitration.** Does the contract require disputes to go to arbitration instead of court? Can you decline that clause and still move in?

☐ **Involuntary discharge.** What can cause them to require the resident to leave, and how much notice do you get?

☐ **Rate increases.** How much notice, how often, and is there any cap?

☐ **Level of care changes.** What triggers a reassessment, who performs it, and can the price change without a change in condition?

☐ **Community fee refund.** Under what circumstances is any of it returned, and on what timeline?

☐ **If funds run out.** What happens? Will they accept Medicaid, and after how long?

☐ **Responsible party.** Read this clause carefully. Some agreements attempt to make the family member who signs personally liable for the bill. You can usually sign as agent or power of attorney instead of as a guarantor.

☐ **Notice to leave.** How much notice must you give, and what do you owe after moving out?

☐ **Personal property.** Who is liable if something is lost or damaged?

☐ **Changes to the agreement.** Can they modify terms unilaterally, and how are you notified?

Ask for a blank copy of the residency agreement before you make a decision. A community that will not provide one until you are ready to sign has told you something.

IF YOU NEED HELP DECIDING

Long-term care ombudsman, your state _____

Area Agency on Aging _____

Eldercare Locator **800-677-1116**

Alzheimer's Association 24/7 Helpline **800-272-3900**



Your state's ombudsman
and agencies
zenblis.com/by-state



Terms you will
hear on a tour
zenblis.com/glossary



More free printables
zenblis.com/caregivers



About Zenblis

Zenblis helps families understand senior care options and find communities near them. We do not accept referral fees or commissions for placements, which means nothing in our directory is ranked by what someone paid us.

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