The Tour Checklist

A companion to the HeartHomes guides to **choosing assisted living** and **choosing memory care** in Maryland · hearthomes.com/resources

HeartHomes
Assisted Living and Memory Care

Touring communities, whether for assisted living or memory care, is one of the biggest steps in this journey, and it can feel like a lot to hold in your head at once. Walking in with the right questions makes it easier. This checklist gathers the ones that matter most, so you can focus on your loved one and on how each community feels, and still leave with everything you need to compare them with confidence. Check off each question as you go, and use page 2 to line the communities up side by side. A few questions apply only if you are looking at memory care. Those are marked.

Before your visit

Write down the essentials
Your loved one's routine, current medications, and diagnoses, so your questions are specific.

Name what worries you
The two or three behaviors that concern you most, so you can ask how staff would handle them.

Bring a second set of eyes
A family member or friend catches what you miss and remembers what you forget.

Six things to look at, and the exact question to ask

Check the box once you have asked. A good community will welcome every one of these.

1. Staffing, training and turnover

The same faces every day is the strongest signal there is. Caregivers who know a resident notice the small changes that matter.

- [ ] **Ask:** How many of the people working today were here a year ago? MEMORY CARE: are staff trained in dementia care, and how often is that refreshed?

2. Safety and response times

Call bells and overnight staff are the baseline. A call system is only as good as the number of people awake to answer it.

- [ ] **Ask:** If my mother presses her call bell at 3am, who comes, and how long does that take? MEMORY CARE: are entrances secured, and is there enclosed outdoor space?

3. Daily life, activities and dining

Food and activity are where quality of life lives. Look for meals cooked on site and a calendar adults would choose from.

- [ ] **Ask:** May I see this month's calendar, and can I eat a meal here during my visit? MEMORY CARE: are activities matched to cognitive level?

4. How care plans change as needs change

Your parent's needs will not be the same in eighteen months. What matters is whether the plan is revisited on a schedule, with you there.

- [ ] **Ask:** How often is a care plan reviewed, and what happens to the monthly cost when the level of care changes?

5. Family involvement and communication

A community that values family makes regular updates, meetings, and invitations to events a normal part of care.

- [ ] **Ask:** Who calls me, and about what? Would I hear about a fall that did not result in an injury?

6. What the monthly rate covers

This is where costs diverge most. Some publish one all-inclusive rate; others add tiered care charges to a base rate.

- [ ] **Ask:** Can I see the full written breakdown, including one-time fees, and what would my parent's level of care cost today?

Before you sign: license, inspections, and contract

- [ ] Verify the community's license with the **Maryland Office of Health Care Quality (OHCQ)** before you sign anything. Maryland does not post inspection reports online, so request the record from OHCQ directly, and ask what was done about anything raised.
- [ ] MEMORY CARE: if a community has a dedicated memory care unit, ask for its written **Alzheimer's Special Care Unit Disclosure Form**, which Maryland requires of those units. Comparing them shows how each one's dementia care differs.
- [ ] Ask for a **full breakdown of the monthly rate:** what is included and what is billed separately, all-inclusive versus a la carte. The number on the brochure is rarely the number you pay.
- [ ] Ask how and when the **rate increases**, and what triggers a move to a higher level of care.

Three tour tips families find useful

- [ ] Visit at least once **unannounced**, ideally late afternoon, and ask to spend time where your parent would actually live, not just the front rooms.
- [ ] Ask the **staff-to-resident ratio on nights and weekends**, not just weekdays, and whether your parent would have the same caregivers each day.
- [ ] **Describe a specific thing** your loved one needs help with, or a behavior that worries you, then ask exactly how staff would respond to it.

HeartHomes
Three intimate, home-like communities in Anne Arundel County, Maryland: Pasadena, Annapolis (Bay Ridge), and Odenton (Piney Orchard).

hearthomes.com/contact-us
or call (443) 871-3168

Compare Communities Side by Side

Tour more than one, and use this page to keep them straight. Log each community you visit below, then work down the rows to compare them side by side. The right choice usually gets a lot clearer once they are next to each other.

Log your visits

COMMUNITY	COMMUNITY	COMMUNITY
DATE OF TOUR	DATE OF TOUR	DATE OF TOUR
TOURED WITH	TOURED WITH	TOURED WITH

What to compare	Community 1	Community 2	Community 3
Staff tenure & turnover How long has the team worked here, and what is the caregiver turnover? A community that keeps its people is the strongest signal there is.			
Talk to a current family Can I speak with a resident's family about their experience, and how are complaints handled when they come up?			
Medication management Who administers medications, how are doses verified, and what prevents a missed dose?			
Dining & nutrition Can I see a sample menu? How are dietary needs, snacks, and a resident who forgets to eat handled?			
Respite or trial stay Do you offer a short respite stay so we can experience daily life before committing? (HeartHomes offers two weeks to 30 days.)			
Staying as needs advance If my loved one's needs grow, including memory loss, can they stay here? If not, what happens, and how does a transition work?			
Monthly rate & what's included The full rate, all-inclusive versus a la carte, and when it increases.			
Overall feel Circle 1 (no) to 5 (yes): could you picture your person here?			

While you are there, notice (a tour is your chance to observe, not just ask):

- ☐ **Resident interactions.** Are residents engaged and at ease, or idle and on their own?
- ☐ **Staff responsiveness.** Do caregivers respond warmly, and greet residents by name?
- ☐ **Cleanliness.** Is the community clean and well kept, with no lingering odors?
- ☐ **Overall atmosphere.** Does the place feel calm, warm, and homelike?

However the tours go, you do not have to decide alone. Contact us and we will talk it through, even if HeartHomes turns out not to be the right fit for your family.

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