

Senior Placement Specialist Checklist

Is This the Right Service for Your Family?

From SeniorSafetyAdvice.com | Esther C. Kane, CAPS

STEP 1 — Know If You Need a Specialist

- ☐ My loved one can no longer safely live alone.
- ☐ A doctor or hospital has recommended a higher level of care.
- ☐ We are overwhelmed by facility options and don't know where to start.
- ☐ We live far away and can't tour facilities in person.
- ☐ Family members disagree about the right next step.
- ☐ We need to move quickly due to a health crisis.
- ☐ We want to plan ahead before a crisis happens.

STEP 2 — Gather Information Before Your First Call

- ☐ Write down my loved one's primary diagnoses and current medications.
- ☐ Note what daily tasks they need help with (bathing, dressing, meals, medications).
- ☐ Identify our monthly budget for care, including what insurance or Medicaid may cover.
- ☐ List geographic preferences — how far from family? Preferred city or neighborhood?
- ☐ Note any personal preferences: faith-based community, language, private room, pets.
- ☐ Ask the primary care doctor or social worker if they have specialist referrals.

STEP 3 — Evaluate the Specialist

- ☐ Ask how they are compensated and whether they receive referral fees from facilities.
- ☐ Ask how many facilities they work with in our area.
- ☐ Ask if they specialize in any care type (memory care, skilled nursing, etc.).
- ☐ Check for credentials or affiliations (NPRA, ALCA, or similar organizations).
- ☐ Read reviews or ask for references from past families.

- ☐ Confirm there is no upfront cost to families for their service.

STEP 4 — Evaluate Each Facility

- ☐ Tour at least 2–3 communities before making a decision.
- ☐ Ask about staff-to-resident ratios and staff turnover rates.
- ☐ Ask what is included in the base monthly fee — and what costs extra.
- ☐ Ask how they handle medical emergencies and after-hours needs.
- ☐ Observe how staff interact with residents during the visit.
- ☐ Ask about the process if care needs increase over time.
- ☐ Request a copy of the contract and read it carefully before signing.

STEP 5 — After the Move

- ☐ Follow up with the specialist if any issues arise in the first 30 days.
- ☐ Visit regularly and observe your loved one's adjustment and comfort.
- ☐ Connect with the facility's social worker or care coordinator.
- ☐ Reassess care needs at least every 6 months.

This checklist is for informational purposes only and does not constitute medical or legal advice.
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The Family Decision Workbook goes deeper. It gives you fillable pages to document your loved one's needs, compare specialists side by side, rate facilities on ten criteria, and track every step from first call to move-in day. Families tell me it takes the chaos out of what can feel like an impossible decision.

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