



# Checklist for Moving to Assisted Living

## Downsizing & Organizing

- Get a floor plan of your new space
- Take pictures of the new space
- Ask facility for a packing list/recommended items
- Pack and label items you'll be bringing with you
- Donate items you'll no longer need
- Label all clothing and personal belongings

## Moving Logistics

- Consider hiring a senior move manager
- Ask facility for moving company recommendations
- Research movers, including reading online reviews
- Confirm moving company is licensed and insured
- Schedule your move-in day

## Health & Medical

- Transfer medical records to facility
  - Submit results of TB test
  - Submit COVID-19 test results, if required
- Schedule initial care assessment with facility
- Share dietary and social preferences with staff
- Transfer prescriptions to facility's preferred pharmacy
- Make a plan for transportation to doctor's appointments

## Bills & Utilities

- Complete facility's pre-move-in paperwork
- Cancel utilities and services at current home
- Set up phone landline (if needed) and Wi-Fi in new location
- Submit change of address form to post office
- Make a plan for monthly payments to facility and fill out direct deposit forms
- Set up recurring payments for additional monthly fees, such as phone, Wi-Fi, and supplemental health insurance

## Legal Documents

- Submit important documents to facility, including:
  - Power of Attorney, both financial and health care
  - Health insurance ID cards (including Medicare & Medicaid)
  - Social Security card
  - End-of-life planning documents, including Do-Not-Resuscitate order (if applicable) and living will

## Settling In

- Familiarize yourself with the facility
  - Locate all emergency pull cords and buttons
  - Find and visit communal gathering spaces
- Personalize your space
  - Hang art and family photos
  - Make bed with preferred bedding
  - Hang clothes in closets and arrange toiletries in bathroom
  - Set up television, Wi-Fi, and phone before spending your first night in the facility