

## Resident Agreement Guide and Checklist

An Assisted Living facility must have an agreement signed and in place prior to a residents admission to the facility. The following is a guide and checklist that states each item that an agreement must contain in order to be in compliance with the laws governing assisted living. Please ensure that each item is fully addressed in an agreement.

- The agreement must be signed and dated by a facility representative and the prospective resident or the resident's legal representative.
- The facility shall provide the prospective resident or the resident's legal representative and the resident's practitioner, if applicable, a copy of the agreement and shall explain the agreement to them.
- The agreement must include the criteria for requiring transfer or discharge of the resident to another level of care.
- The agreement must include a statement explaining the availability of skilled nursing or other professional services from a third party provider to a resident in the facility.
- The agreement must include the extent that specific assistance will be provided by the facility as specified in the resident service plan.
- The agreement must include a statement explaining the resident's responsibilities.
- The agreement must include a statement explaining house rules.
- The agreement must include a statement explaining the facility grievance policy.
- The agreement must include a statement explaining the facility's smoking policy.
- The agreement must include a statement explaining the facility's policies regarding pets.
- The agreement must include a listing of specific charges to be incurred for the resident's care, frequency of payment, and facility rules relating to nonpayment of services and security deposits, if any are required.
- The agreement must include a statement of all charges, fines, penalties or late fees that will be assessed against the resident.
- The agreement must include a statement that the agreed upon facility rate shall not be changed unless 30 day advance written notice is given to the resident and/or the resident's legal representative.
- The agreement must include an explanation of the assisted living facility's policy for refunding payment in the event of the resident's absence, discharge or transfer from the facility and the facility's policy for refunding security deposits.

When there are changes in services, financial arrangements, or in requirements governing the resident's conduct and care, a new resident/provider agreement must be executed or the original agreement must be updated by addendum and signed and dated by the resident or the resident's legal representative and by the facility representative.

If you have further questions regarding resident agreements, please contact Leigh Ann Holmes, Program Manager, at 444-1575; Harry Dziak, MSW, at 444-0572; Tara Popp, LPN, at 444-9138; or Linda Egebjerg, RN, at 444-5401.