

The Assisted Living Family Decision Checklist

Compliments of: www.usepetunia.com

Get 1 month of Petunia Free!

Use code: CHECKLIST

*Step 1:
Get the Family
aligned from
the start*

- **Schedule a family meeting** – ideally in-person or via video call.
- **Acknowledge that everyone wants what's best**—even if opinions differ.
- **Clarify roles** – who will handle research, finances, logistics, emotional support.
- **Set decision-making expectations**—is it majority rule? Does the parent have the final say?
- **Agree on core priorities** – eg. safety, cost, location, community, healthcare access.

*Step 2:
Involve your
Parent in the
process (if able)*

- **Ask open-ended questions** – instead of presenting solutions right away.
- **Understand their fears and preferences** – independence, privacy, social life, care needs.
- **Encourage them to express concerns** so they don't feel forced.
- **Set realistic expectations**—help them see the pros and cons of staying home vs. Assisted Living.

*Step 3:
Research as a
team*



- **Use Petunia for comparing options and collecting information** – We make it easy to collect & compare!
- **Divide research tasks** who looks into costs, who calls communities, who schedules tours
- **Set deadlines** to keep the process moving—decisions take time, but dragging it out adds stress. (Yep, we do this, too!)
- **Check independent reviews & state inspection reports** before visiting.

*Step 4: Tour &
Evaluate
options -
Together*



- **Visit at least 4 communities**
- **Share notes from tours with Petunia**—each person may notice different things.
- **Create a pros & cons list** with input from all stakeholders.
- **Have your family meet residents and staff**— seek to engage with more than just the Sales staff

www.usepetunia.com

The Assisted Living Family Decision Checklist

Compliments of: www.usepetunia.com

Get 1 month of Petunia Free!

Use code: CHECKLIST

Step 5: Make a decision everyone supports



- **Host a final decision meeting** to discuss top choices. Review the notes and materials you've logged in Petunia.
- **Revisit the priorities list**—does the top choice meet the agreed criteria?
- **Address lingering concerns** openly to avoid future resentment.
- **Give your parent the final say if possible**—this makes acceptance easier.
- **Review the contract together** before signing to avoid misunderstandings.

Step 6: Support the transition as a family

- **Agree on a transition plan**—who will be there for move-in, how will visits be handled?
- **Establish a communication plan** - family group chat, shared updates, visit schedules.
- **Assign emotional support roles**- who reassures the parent, who checks in on logistics?).
- **Celebrate small wins**—help your parent get involved in the new community.
- **Schedule a 60-90 day follow up** —Your Assisted Living team should do this, but if not, be sure to set the date and be ready with any feedback.

Final tip: Assisted Living is a journey

Assisted Living is an adjustment for the whole family. Keep communication open, stay flexible, and remember your Loved One's happiness and wellness is your priority.

www.usepetunia.com