



Recommendations for Medical and Mental Health Care in Assisted Living: Resident and Family Checklist

Assisted living (AL) is the largest provider of residential long-term care in the country, including for persons with Alzheimer's disease and related dementias. The medical and mental health care needs of the people who live there have increased, raising concern about the suitability of assisted living to address those needs.

In 2022, a journal of the American Medical Association (JAMA) published experts' recommendations for medical and mental health care in assisted living.

The recommendations address three areas:

- 1. *Staff and staff training*** (including professional caregivers who provide daily support and care)
- 2. *Health services and psychosocial care*** (for mental, emotional, and social well-being)
- 3. *Assessment, care planning, and coordination***

This checklist of recommendations may be useful for people considering or residing in assisted living.

Source: Zimmerman S, Sloane PD, Wretman CJ, et al. Recommendations for Medical and Mental Health Care in Assisted Living Based on an Expert Delphi Consensus Panel: A Consensus Statement. JAMA Netw Open. 2022 Sep 1;5(9):e2233872. p 1;5(9):e2233872. <https://jamanetwork.com/journals/jamanetworkopen/fullarticle/2796840>

Note: In some instances, state regulations may restrict select services, and additional items may be important to medical and mental health care in assisted living. See the entire article for details.

Staff and Staff Training

Does the community assure adequate staffing?

- Sufficient number and stability of professional caregivers
- Licensed nursing leadership (RN/LPN/LVN)

Does the community provide staff training?

- Person-centered care
- Dementia and mental illness
- Medication side effects
- Infection prevention and control
- End-of-life care

Health Services and Psychosocial Care

Does the community offer on-site services?

- Routine toenail care
- Measure and monitor weight
- Blood sugar testing
- Insulin injections
- Breathing/nebulizer treatments
- Advance care planning discussions
- Influenza vaccinations
- Physical and occupational therapy
- Medical and mental health providers

Does the community establish policies and practices?

- Aggressive or other behaviors
- Suicidal thoughts
- Consent for antipsychotic or opioid medication
- Psychotropic medication dose reduction

Assessment, Care Planning, and Coordination

Does the community conduct inclusive assessment and care planning?

- Nurse/health care supervisor involved
- Professional caregivers involved
- Resident involved
- Family involved

Does the community perform formal assessments?

- Cognition assessment
- Agitation assessment
- Assessment in other key areas (such as depression)

Does the community involve responsible parties in decisions?

- Emergency department visits
- Changes in status
- Medication changes

Does the community coordinate off-site care?

- Schedule health care visits

Does the community maintain resident health records?

- Regular and as-needed assessments and care plans
- Health information including advance directives
- Post-visit notes from all off-site care

To learn more about these recommendations and other
CEAL@UNC initiatives, visit <https://theceal.org/>.