



Love & Patience

SENIOR PLACEMENT & CARE NAVIGATION

Getting Ready for Placement

A family planning checklist for assisted living or a residential care home.

You do not need every answer before contacting Rick. Use this guide to organize the next conversation, not to assess care needs.

Start with what matters

- ☐ Discuss the preferred area, setting, daily routines and activities.
- ☐ Identify a family contact and confirm who has authority for decisions and authorizations.
- ☐ Discuss an affordable monthly range and which costs need clarification.
- ☐ Write down questions for each community about the support it can provide.

Begin the medical paperwork early

- ☐ Ask the receiving community which forms, assessments and timing it requires.
- ☐ Download and print all nine pages of California LIC 602A if the community requests it.
- ☐ Contact the medical office about its process, turnaround time and any appointment needed.
- ☐ Confirm facility details before signing a release naming the receiving facility.

Who completes the 602? Facility information is completed by the licensee or designee. The resident or legal representative completes the resident and authorization sections. A licensed medical professional completes the clinical information and signs the form.

Families can explore options and tour while the assessment is being arranged. The receiving community confirms admission requirements.

Our next step:



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Confirm the details before arranging a move. Requirements vary by community.

Before signing or scheduling

- ☐ Confirm the community can meet the assessed needs and has an appropriate opening.
- ☐ Obtain the written cost estimate, admission agreement and explanation of extra charges.
- ☐ Ask about move-in timing, required supplies, room furnishings and personal belongings.
- ☐ Coordinate medication and clinical records directly with the authorized care professionals and receiving community.
- ☐ Confirm transport, access arrangements and whom to contact on move-in day.
- ☐ Ask how the community will communicate with the resident and authorized family contacts after the move.

Keep private information private

This is your family's planning sheet. Do not upload completed medical forms, financial worksheets, identification documents or private records through the Love & Patience website or a general inquiry email. Arrange secure delivery with the authorized recipient.

Questions / people to contact / tasks to arrange:

This guide is educational and does not replace a community assessment, admission requirements or professional advice. Need help organizing the next step? Contact Rick.