

PROJECT CONNECTIONS / BATCH 3 / PLANNER 04

Put the Person at the Center of the Plan.

Assisted Living Transition Decision & Coordination Kit

Organize preferences, care questions, options and practical handoffs. Keep the person involved and confirm who may make each decision.

PRINT-READY WORKBOOK / 14 PAGES

Illustrative scene; not an identified SJBA member project.

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Begin with the person's preferences

Assisted living is one option to explore, not a conclusion. Ask how the person wants to participate and communicate. Family support does not itself establish decision authority.



CHOOSE YOUR STARTING POINT

Listen / Assess / Compare / Coordinate

Illustrative scene; not an identified SJBA member project.

Important routines / preferences / desired involvement

Person-led planning goal / participants / authority to clarify

Target review date / communication choice / progress measure

Gather facts and verify requirements / pages 3-6

Compare options and coordinate / pages 7-10

Resolve questions and act / pages 11-14

Track actions on page 13. Keep completed worksheets private; omit full account numbers, identity documents and detailed medical or employee records.

Prepare care-assessment questions

Ask an appropriate qualified care professional what assessment is needed and which arrangements could meet the person's needs. Record only practical planning information, not detailed diagnoses. [S3]

Who can provide appropriate assessment / appointment / consent?

What daily support questions should the assessment address?

What options and limits should be explained to the person?

What planning information may be shared / with whom / how?

Do not use this workbook to diagnose, choose a level of care or direct medication management.

Clarify authority and consent

Distinguish helping someone understand choices from making a decision for them. Ask qualified counsel or the responsible professional to review any authority documents and their scope. [S4]

01 / Who decides about the care arrangement?

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

02 / Who may receive records or share information?

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

03 / Who may sign contracts or approve spending?

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

A relationship or a place on this worksheet does not establish substituted decision-making authority.

Compare possible arrangements

Use care guidance and the person's priorities to compare support at home, modifications, assisted living or another arrangement. Identify what each option cannot provide.

Option / provider A: _____ B: _____

Comparison point	A / evidence / date	B / evidence / date
Person's preferences / daily routine		
Support available / gaps to assess		
Access / transport / relationships		
Costs / availability / uncertainty		
Changes that would require review		

Tradeoff / information needed / decision owner / review date

Name options A and B, then copy the page for additional arrangements. No clinical suitability score is implied.

Research the setting and its services

Use NJ Department of Health resources to check the relevant facility status. Request written service descriptions and clarify what the status record does and does not establish. [S1]

01 / Facility / official licensing-status source

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

02 / Services described / evidence requested

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

03 / Visit date / unresolved suitability questions

Authority / professional / contact: _____

Source / checked date / actual deadline: _____

Applicable finding / evidence / conditions: _____

Unresolved question / owner / follow-up: _____

Licensing information does not by itself establish that a setting meets this person's needs. Ask the care professional and the person.

Compare what you learn on visits

Ask the same practical questions at each setting. Distinguish an observed feature, a verbal answer and a written commitment. Include the person's feedback in the comparison.

Option / provider A: _____ B: _____

Comparison point	A / evidence / date	B / evidence / date
Routines / choice / visitor arrangements		
Access / rooms / familiar activities		
Staffing / response / care coordination		
Included and excluded services		
Emergency arrangements / escalation		

Tradeoff / information needed / decision owner / review date

Ask how the setting responds if needs change. Record the answer and request relevant written terms.

Map the full cost

Ask for a dated written schedule, conditions for additional charges, and how increases are communicated. Verify any funding or coverage directly with the relevant program or plan.

Period / scenario: _____ Currency: _____

Cost / responsibility	Estimate	Confirmed	Source / cash due
Recurring base charge			
Additional support / service charges			
Deposits / initial charges			
Move / setup / transport			
Overlapping housing obligations			
Possible increases / contingency			

Total / one-time vs. recurring / decision owner / next review

Identify one-time versus recurring amounts and their period. Do not assume Medicare, insurance or another program pays a charge.

Ask about the contract and rights

Have qualified counsel explain the contract before an authorized signature. Ask the long-term care ombudsman about relevant resident resources and complaint routes. [S2]

Who may sign / which terms need independent review?

Included services / change-of-needs / transfer questions

Charges / changes / cancellation or refund questions

Rights / complaint route / written response contact

This page does not state a legal right to cancel or promise a refund. Obtain advice about the applicable agreement and setting.

Coordinate a person-centered transition

Record what the person has approved and what remains undecided. Clinical information belongs in the appropriate secure professional handoff, not in this workbook.

Resident / chosen support person

Confirm preferred possessions, familiar routines and how choices will be checked.

Owner: _____ Due: _____ Received by: _____

Care professionals / receiving setting

Confirm consent, secure records handling and the appropriate care handoff.

Owner: _____ Due: _____ Received by: _____

Mover / transport / property support

Confirm access, timing, item list and property responsibilities under authority.

Owner: _____ Due: _____ Received by: _____

Legal / financial / insurance advisers

Resolve contract, funding, authority and continuing-obligation questions.

Owner: _____ Due: _____ Received by: _____

SJBA roles may assist practical parts of the transition; the directory does not certify care expertise.

Plan comfort on moving day

Keep the day manageable and respect the person's choices. Confirm the receiving contact and care handoff with the appropriate professionals.

Need / preference	Agreed arrangement	Owner / confirmation
Familiar items / preferred setup		
Transport / arrival arrangement		
Chosen support contact		
Receiving staff / handoff confirmed		
Rest / meals / routine questions		

Next question / responsible person / review date

Do not record medication instructions here. Ask the appropriate care team to manage those details securely.

Listen and follow up early

Ask the person what is working and what should change. Agree on a contact and response date for each concern; use the setting's urgent process or emergency services for immediate danger.

Review date / person's feedback in their own words

Concern / desired change / agreed response contact

Action agreed / owner / date / response received

Next review / unresolved issue / escalation route

Keep the conversation accessible to the person. A move is not the end of the decision process.

Turn conversations into agreed actions

Use the person's preferences and unresolved assessment, authority, cost and service questions. Record recommendations without treating them as automatic permission.

Care professional: options and support needs to clarify

Legal / financial: authority, contract and funding questions

Role / meeting date / question / documents to bring

Recommendation / unresolved decision / owner / follow-up

Decision / limits: _____ Review cadence: _____

PRIORITY 1 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

PRIORITY 2 / Action: _____

Owner: _____ Due: _____

Dependency / evidence: _____

Progress / next review: _____

Review sooner if preferences, support needs or available services change.

Sources and your next connection

Primary resources checked October 15, 2026 (UTC). Recheck before acting. Blue underlined titles are clickable; [S#] references identify the sources below.

[S1] NJ Department of Health | Health facilities

Find facility status and regulatory resources; independently confirm service fit.

[S2] NJ Long-Term Care Ombudsman

Resident resources and complaint information; confirm the applicable setting and process.

[S3] NJ Division of Aging Services

Explore support and county resources alongside appropriate professional care assessment.

[S4] New Jersey | Find legal aid

Find legal-help resources; services and eligibility must be confirmed directly.

General educational planning information, not individualized legal, tax, financial, insurance, clinical, engineering or construction advice. Requirements vary; qualified professionals and relevant authorities should confirm applicable decisions.

Need professional guidance?

Explore current professionals in the SJBA directory. Bring your questions. Roles in this workbook are conceptual; verify representation, qualifications, scope and availability.

About SJBA

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