

## Move-In Week Guide and Checklist

Apartment 214 · Seven-day schedule, required documents, owners, and deadlines

### THIS GUIDE DOES NOT ASSIGN A LEVEL OF CARE

Care services and medication management tiers are assigned only after the nurse assessment and the service plan conference on Monday, April 26, 2027. Nothing in this packet determines, promises, or limits the services a resident will receive.

|                                                                                              |                                                                   |                                                                                |                                                                                      |
|----------------------------------------------------------------------------------------------|-------------------------------------------------------------------|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| RESPONSIBLE PARTY<br><b>Claire Whitfield-Oyelaran</b><br>(daughter)                          | RESPONSIBLE PARTY PHONE<br><b>1-888-555-0181</b>                  | EMERGENCY CONTACT 2<br><b>Daniel Whitfield (son),</b><br><b>1-888-555-0182</b> | MOVE-IN COORDINATOR<br><b>Tomás Iglesias, resident</b><br><b>services</b>            |
| NURSE OF RECORD<br><b>Priya Raghunathan, RN,</b><br><b>director of health &amp; wellness</b> | BUSINESS OFFICE<br><b>Joyce Wembley,</b><br><b>1-888-555-0171</b> | MOVE-IN WINDOW<br><b>Monday, April 12, 9:00–11:00</b><br><b>a.m.</b>           | FIRST SERVICE PLAN CONFERENCE<br><b>Monday, April 26, 2027, 10:00</b><br><b>a.m.</b> |

#### 1. DOCUMENTS DUE BEFORE KEYS ARE ISSUED — FRIDAY, APRIL 9, 2027

| DOCUMENT                                                                                | PROVIDED BY                    | DUE        | DELIVERED TO                                  | STATUS AS OF MARCH 30 |
|-----------------------------------------------------------------------------------------|--------------------------------|------------|-----------------------------------------------|-----------------------|
| Residency agreement, all pages initialed and signed                                     | Resident and responsible party | Fri Apr 9  | Business office (Joyce Wembley)               | Received 04/07        |
| Physician report and health assessment, form BC-HA-01, dated on or after March 13, 2027 | Primary care provider          | Fri Apr 9  | Health & wellness office (P. Raghunathan, RN) | Received 04/05        |
| Tuberculosis screening result, completed within 90 days                                 | Primary care provider          | Fri Apr 9  | Health & wellness office                      | Received 04/05        |
| Current signed physician medication orders, form BC-MO-02                               | Primary care provider          | Fri Apr 9  | Health & wellness office                      | Pending — faxed 04/08 |
| Pharmacy transfer authorization, form BC-RX-03                                          | Resident or responsible party  | Fri Apr 9  | Health & wellness office                      | Received 04/06        |
| Advance directive, healthcare power of attorney, and POLST if one exists                | Resident or responsible party  | Fri Apr 9  | Resident record (T. Iglesias)                 | Received 04/06        |
| Financial power of attorney or representative payee documentation, if applicable        | Responsible party              | Fri Apr 9  | Business office                               | Not applicable        |
| Automatic payment authorization, form BC-ACH-07, or first-month check                   | Responsible party              | Fri Apr 9  | Business office                               | Received 04/07        |
| Photo identification, insurance cards, pharmacy card, and Medicare card copies          | Resident or responsible party  | Mon Apr 12 | Business office                               | Bring on move-in day  |
| Authorized contact and information-sharing form, BC-COM-04                              | Resident                       | Mon Apr 12 | Resident services (T. Iglesias)               | Bring on move-in day  |
| Renter's or personal property insurance declaration page                                | Responsible party              | Fri Apr 23 | Business office                               | Outstanding           |
| Dining preference and food allergy form, BC-DN-11                                       | Resident                       | Mon Apr 12 | Dining services (A. Pellerin)                 | Bring on move-in day  |

Keys, the door fob, and the emergency pendant are issued only after the health assessment, the signed physician medication orders, and the executed residency agreement are all on file. If a document is outstanding on the morning of April 12, call Tomás Iglesias at 1-888-555-0172 before the moving vehicle is loaded.

## 2. APARTMENT 214 AT A GLANCE

| MEASUREMENT                | DIMENSION                |
|----------------------------|--------------------------|
| Total apartment            | 480 square feet          |
| Living area                | 13 ft 2 in × 11 ft 8 in  |
| Bedroom                    | 11 ft 6 in × 10 ft 10 in |
| Bedroom closet, interior   | 5 ft 0 in × 2 ft 4 in    |
| Bathroom door, clear width | 34 in                    |
| Entry door, clear width    | 36 in                    |
| Window wall                | East facing, 2 windows   |

Measure furniture before the move. The freight elevator cab interior is 6 ft 8 in deep and the door opening is 41 in wide.

## 3. PROVIDED, ALLOWED, AND NOT PERMITTED

**Provided by the community:** emergency call pendant and pull cords, wall-mounted grab bars, window coverings, overhead lighting, individual thermostat, sprinkler head, smoke and heat detectors, small refrigerator, and a microwave rated at 1,100 watts.

**Bring your own:** furniture, bedding, towels, lamps with LED bulbs, wall art with adhesive hangers, a telephone, and a television.

### Not permitted in any apartment:

- Portable space heaters of any type
- Candles, incense, oil lamps, or any open flame
- Extension cords without a fused surge protector
- Cooking appliances rated above 1,500 watts, including toaster ovens and hot plates
- Area rugs without a continuous non-slip backing
- Halogen torchiere lamps
- Firearms, ammunition, or any weapon

## 4. MOVE-IN WEEK SCHEDULE — MONDAY, APRIL 12 THROUGH SUNDAY, APRIL 18, 2027

| DAY   | DATE       | TIME            | ACTIVITY                                                                  | WHO LEADS IT                       | WHAT YOU NEED                                           |
|-------|------------|-----------------|---------------------------------------------------------------------------|------------------------------------|---------------------------------------------------------|
| Day 1 | Mon Apr 12 | 9:00–11:00 a.m. | Freight elevator reserved; boxes and small items delivered                | Curtis Boyd, maintenance lead      | Elevator pad placed; hallway kept clear                 |
| Day 1 | Mon Apr 12 | 11:15 a.m.      | Keys, fob, and emergency pendant issued and tested                        | Tomás Iglesias, resident services  | Signature on form BC-KEY-09                             |
| Day 1 | Mon Apr 12 | 12:30–2:30 p.m. | Furniture delivery and placement; bed assembled                           | Family and delivery vendor         | Floor plan on page 2; no wall anchors without approval  |
| Day 1 | Mon Apr 12 | 3:00 p.m.       | Medication handoff and controlled-substance count                         | Priya Raghunathan, RN              | All medications in original labeled pharmacy containers |
| Day 1 | Mon Apr 12 | 5:00 p.m.       | First dinner in the Magnolia dining room; table introduction              | Andre Pellerin, dining services    | Dining preference form completed                        |
| Day 2 | Tue Apr 13 | 10:00 a.m.      | Belongings inventory walkthrough and clothing labeling pickup             | Tomás Iglesias                     | Inventory form BC-INV-05 signed by resident and staff   |
| Day 2 | Tue Apr 13 | 2:00 p.m.       | Nurse baseline check-in and pendant response drill                        | Priya Raghunathan, RN              | Resident present in the apartment                       |
| Day 3 | Wed Apr 14 | 9:30 a.m.       | Community orientation session 1: building, safety, and alarms             | Marcus Delaney, executive director | Magnolia conference room                                |
| Day 3 | Wed Apr 14 | 1:00 p.m.       | Business office review: statement format, due dates, and billing contacts | Joyce Wembley                      | Responsible party invited by phone                      |
| Day 4 | Thu Apr 15 | 10:30 a.m.      | Life enrichment interview and calendar walkthrough                        | Noor Habib, life enrichment        | Interest inventory form BC-LE-14                        |
| Day 5 | Fri Apr 16 | 9:00 a.m.       | Orientation session 2: dining, transportation, and guest policies         | Andre Pellerin and Tomás Iglesias  | Bring questions from the first four days                |
| Day 5 | Fri Apr 16 | 3:00 p.m.       | Seven-day settling check; open items logged for the conference            | Tomás Iglesias                     | Open-item list started on page 4                        |
| Day 6 | Sat Apr 17 | Open            | Family visiting day; scheduled transportation does not run                | No staff lead                      | Sign guests in at the front desk                        |
| Day 7 | Sun Apr 18 | 2:00 p.m.       | Optional neighbor social in the Magnolia parlor                           | Noor Habib                         | No registration required                                |

Times are held for this move only. If a delivery runs long, the front desk will reschedule the affected session rather than shorten it. Sessions missed during move-in week are offered again during the following two weeks.

## 5. MEDICATION HANDOFF RECORD — MONDAY, APRIL 12, 2027, 3:00 P.M.

Medications are received by the nurse in their original pharmacy containers with intact labels. The nurse verifies that every container matches a current signed physician order on form BC-MO-02, records the quantity received, and returns any container that cannot be matched. Family members are asked to remain for the count.

| # | CONTAINER AS RECEIVED                                               | PRESCRIBER       | DISPENSING PHARMACY       | QTY RECEIVED | CONTAINER TYPE | COUNTED AND VERIFIED BY             | TIME      |
|---|---------------------------------------------------------------------|------------------|---------------------------|--------------|----------------|-------------------------------------|-----------|
| 1 | Tablet, as printed on the pharmacy label                            | R. Feld, MD      | Ashfield Grove Apothecary | 30           | Sealed vial    | P. Raghunathan, RN / family witness | 3:04 p.m. |
| 2 | Tablet, as printed on the pharmacy label                            | R. Feld, MD      | Ashfield Grove Apothecary | 90           | Sealed vial    | P. Raghunathan, RN / family witness | 3:07 p.m. |
| 3 | Capsule, as printed on the pharmacy label                           | R. Feld, MD      | Ashfield Grove Apothecary | 30           | Blister card   | P. Raghunathan, RN / family witness | 3:09 p.m. |
| 4 | Eye drops, as printed on the pharmacy label                         | S. Aduba, OD     | Ashfield Grove Apothecary | 1 bottle     | Sealed carton  | P. Raghunathan, RN / family witness | 3:12 p.m. |
| 5 | Controlled substance, Schedule IV, as printed on the pharmacy label | R. Feld, MD      | Ashfield Grove Apothecary | 14           | Sealed vial    | Two-signature count: RN and LPN     | 3:15 p.m. |
| 6 | Over-the-counter supplement, unopened manufacturer container        | Resident request | Retail purchase           | 1 bottle     | Factory sealed | P. Raghunathan, RN / family witness | 3:18 p.m. |

**Scope of this record:** This record documents what was received and counted. It does not direct how, when, or whether any medication is administered. Administration follows the signed physician orders in the resident record and the community's medication administration policy, and it begins only after the nurse confirms every order.

Any container the resident wishes to keep in the apartment requires a completed self-administration assessment, form BC-SA-08. Until that assessment is complete, all medications are stored in the neighborhood medication cart assigned to apartment 214.

## 6. BELONGINGS INVENTORY — RECORDED TUESDAY, APRIL 13

| ITEM                        | LOCATION               | MARKING OR SERIAL             | DECLARED VALUE | INITIALS | RECORD                  |
|-----------------------------|------------------------|-------------------------------|----------------|----------|-------------------------|
| Recliner, upholstered, sage | Living room            | None                          | \$640          | E.R.W.   | Photographed            |
| Oak dresser, six drawer     | Bedroom                | Engraved initials, back panel | \$450          | E.R.W.   | Photographed            |
| Television, 43 inch         | Living room            | Serial ••••4471               | \$310          | E.R.W.   | Photographed            |
| Wedding ring set            | Resident safe, box 214 | Appraisal on file with family | Declared       | E.R.W.   | Sealed and logged       |
| Wall clock, brass           | Living room            | None                          | \$95           | E.R.W.   | Photographed            |
| Photo albums (4)            | Bedroom closet shelf   | None                          | Sentimental    | E.R.W.   | Counted                 |
| Walker, rolling, with seat  | Entry                  | Label BC-214-01               | \$180          | E.R.W.   | Labeled 04/13           |
| Clothing, 42 marked items   | Bedroom closet         | Heat-seal labels, 04/13       | Not declared   | E.R.W.   | Labeled within 48 hours |

## 7. LABELING, VALUABLES, AND INSURANCE

1. Every clothing item is heat-seal labeled within 48 hours of move-in. Unlabeled clothing sent to the community laundry cannot be traced.
2. Items over \$250 in declared value are photographed and added to the inventory form.
3. Jewelry, cash, and documents belong in the resident safe. Front desk staff log the box number and the date of each access.
4. The community does not insure resident property. A renter's or personal property policy is required and the declaration page is due Friday, April 23, 2027.
5. Report a missing item to the front desk the same day. A property report is opened within one business day and the outcome is reported to the responsible party.

The inventory is reviewed again at the service plan conference and updated whenever an item is added or removed.

## 8. DINING IN THE MAGNOLIA NEIGHBORHOOD

| MEAL          | SERVING WINDOW       | LOCATION             | NOTES                              |
|---------------|----------------------|----------------------|------------------------------------|
| Breakfast     | 7:30–9:30 a.m.       | Magnolia dining room | Continental table until 10:30 a.m. |
| Lunch         | 11:45 a.m.–1:15 p.m. | Magnolia dining room | Main meal of the day               |
| Dinner        | 5:00–6:30 p.m.       | Magnolia dining room | Table seating assigned             |
| Evening snack | 7:30–8:30 p.m.       | Parlor               | Self-serve                         |

**Table assignment:** Table 6, seat 2, with three neighbors from the Magnolia neighborhood. Seating is reviewed after 30 days and can be changed at any time by asking the dining services director.

**Preferences and allergies:** form BC-DN-11 is due at move-in. Two documented allergies and one texture preference are on the April 12 kitchen sheet. Any change to a therapeutic diet requires a signed physician order.

## 9. ORIENTATION SESSIONS AND STANDING SCHEDULE

| SESSION OR ACTIVITY               | WHEN                             | WHERE                    |
|-----------------------------------|----------------------------------|--------------------------|
| Building, safety, and alarms      | Wed Apr 14, 9:30 a.m.            | Magnolia conference room |
| Dining, transportation, guests    | Fri Apr 16, 9:00 a.m.            | Magnolia conference room |
| Portal and family messaging setup | Fri Apr 16, 10:30 a.m.           | Front desk               |
| Resident council introduction     | First Tue monthly, 3:00 p.m.     | Parlor                   |
| Scheduled transportation          | Tue and Thu, 9:00 a.m.–1:00 p.m. | Main entrance            |
| Chapel service                    | Sun, 10:00 a.m.                  | Parlor                   |
| Fire drill (all residents)        | Quarterly, announced             | Community wide           |

Orientation attendance is recorded in the resident record. Sessions are repeated monthly for residents who cannot attend during move-in week.

## 10. MONTHLY FEE SCHEDULE FOR APARTMENT 214

| CHARGE                                                    | AMOUNT                                          | FREQUENCY                                     | DUE              | NOTES                                                |
|-----------------------------------------------------------|-------------------------------------------------|-----------------------------------------------|------------------|------------------------------------------------------|
| Monthly apartment fee, one bedroom, Magnolia neighborhood | \$4,285.00                                      | Monthly, in advance                           | 1st of the month | Prorated for April from the 12th                     |
| One-time community fee                                    | \$3,500.00                                      | Once, at execution of the residency agreement | Paid 04/07       | Non-refundable after the seven-day rescission period |
| Second occupant fee                                       | \$895.00                                        | Monthly                                       | 1st of the month | Not applicable                                       |
| Care services fee                                         | Assigned by tier at the service plan conference | Monthly                                       | 1st of the month | Not assigned by this guide                           |
| Medication management service                             | Assigned by tier at the service plan conference | Monthly                                       | 1st of the month | Not assigned by this guide                           |
| Guest meal, dining room                                   | \$12.50 each                                    | As incurred                                   | Next statement   | Charged to the account                               |
| Tray service to the apartment                             | \$5.00 per tray                                 | As incurred                                   | Next statement   | Requires a nurse note on file                        |
| Scheduled group transportation                            | Included                                        | —                                             | —                | Tue and Thu, 9:00 a.m.–1:00 p.m.                     |
| Individual medical transportation                         | \$38.00 per trip                                | As incurred                                   | Next statement   | Requires 72 hours notice                             |
| Beauty salon and barber                                   | Posted price list                               | As incurred                                   | Next statement   | Third-party vendor, billed through the account       |

April is prorated from the 12th at the daily equivalent of the monthly apartment fee. The first full statement is issued on May 1, 2027 and is due by May 10, 2027. Any change to a recurring charge is preceded by 30 days written notice to the resident and the responsible party.

## 11. THE FIRST SERVICE PLAN CONFERENCE — MONDAY, APRIL 26, 2027, 10:00 A.M.

A service plan conference is held no later than 14 days after move-in. The nurse assessment, the first two weeks of service delivery records, dining observations, and the resident's own goals are reviewed together, and the care services tier and medication management tier are assigned at that meeting. Prepare using the separate conference preparation packet.

- ☐ Write down three things that should be different or better after the first month
- ☐ Bring the open-item list started on Friday, April 16
- ☐ Confirm which family members will attend in person and which will join by phone
- ☐ Bring any new prescription or discharge paperwork issued since April 9
- ☐ Note any equipment that has not worked as expected, including the pendant

## 12. WHO TO CONTACT DURING THE FIRST WEEK

|                |                                                                                                                                    |
|----------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Routine</b> | Front desk, 1-888-555-0170, 7:00 a.m.–8:00 p.m. daily. Answered live; a message is returned the same day.                          |
| <b>Care</b>    | Priya Raghunathan, RN, 1-888-555-0173. The nurse line is answered 24 hours a day.                                                  |
| <b>Move-in</b> | Tomás Iglesias, 1-888-555-0172, Monday through Friday, 8:00 a.m.–5:00 p.m.                                                         |
| <b>Billing</b> | Joyce Wembley, 1-888-555-0171, Monday through Friday, 9:00 a.m.–4:00 p.m.                                                          |
| <b>Repairs</b> | Front desk work order, or Curtis Boyd, 1-888-555-0174. Urgent repairs are addressed the same day.                                  |
| <b>Nights</b>  | After-hours administrator on call, 1-888-555-0175, 8:00 p.m.–7:00 a.m.                                                             |
| <b>911</b>     | Call 911 first for any suspected emergency, then notify the front desk so staff can meet responders and bring the resident record. |

## 13. ACKNOWLEDGMENT

Signing below records that this guide was reviewed. It is not a service plan, an assessment, a consent to treatment, or an agreement to any care services tier.

| SIGNATURE | PRINTED NAME              | ROLE                          | DATE |
|-----------|---------------------------|-------------------------------|------|
|           | Eleanor R. Whitfield      | Resident                      |      |
|           | Claire Whitfield-Oyelaran | Responsible party             |      |
|           | Tomás Iglesias            | Resident services coordinator |      |
|           | Priya Raghunathan, RN     | Director of health & wellness |      |

FICTIONAL SPECIMEN. Brookmere Commons Senior Living, the resident, the family contacts, the staff names, the apartment, the form numbers, the dates, the phone numbers, and every fee shown here are invented for demonstration only. This document is not a residency agreement, an assessment, a service plan, a medication order, a level-of-care determination, or a fee schedule for any real community or resident, and nothing in it should be followed or relied on.