



**Consumer to Consumer:  
Tips for a Successful Nursing Home Transition**

Moving out of a nursing home and back into the community can be difficult. The purpose of this Tip Sheet is to share with you suggestions for steps you can take to make your move go as smoothly as possible. These recommendations come directly from people who have already transitioned so you can learn from their experiences.

This Tip Sheet is designed to be used along with a checklist that takes you step by step through what you can do before, during and after your move in order to make your transition a success. The checklist included for your use is printed with permission of the Independent Living Research Utilization (ILRU) and IL-NET.

## Pre Transition Tips:

- ✓ Establish a support system (examples: nursing home staff, family member, friend, ombudsman, transition coordinator).
- ✓ Ask questions throughout. If you don't understand – ask for clarification.
- ✓ Develop a realistic budget plan.
- ✓ When possible, interview home care aides while still in the nursing home and look for aides that you feel comfortable with and who have a schedule that will fit with your needs.
- ✓ Shop around for housing. Don't settle for the first available housing option if you are not comfortable with it.
- ✓ Find out your discharge date. Many places cannot deliver furniture or medications to your new home until you are

living in your new home. Know your discharge date so you can have everything scheduled for delivery the day of your move.

- ✓ Apply for local transportation services as soon as possible. Commonly known as “paratransit,” each state is required to provide transportation services to people with disabilities.
- ✓ Collect and organize your important documents: birth certificate, Social Security card, state identification card, Medicaid and Medicare cards.
- ✓ Notify the postal service of the change of address. This can be done for a small fee online or for free by filling out a change of address form from your local post office or mail carrier. You can also call 1-800-ASK-USPS (1-800-275-8777).
- ✓ Apply for food stamps and/or food delivery, such as Meals on Wheels.

- ✓ Remind your nursing home that they should give you enough medication for 30 days when you move out. Make sure you also have all your prescriptions as a backup plan.
- ✓ Locate a primary care doctor and set up your medications so they are delivered to your door.

### **Post Transition Tips:**

- ✓ Get out into the community as much as possible. Stay active in the community and do activities that make you happy.
- ✓ Be social. Keep in touch with loved ones and friends in person, on the phone, or by computer.
- ✓ Watch your budget. Make your dollars stretch and keep an eye on what you can/cannot afford.

- ✓ Train your personal care staff and self-direct your care needs.
- ✓ Locate or create a support group.

## Transition Checklist

<b>Two – Three Months Prior to the Move</b>		
<b>Issues</b>	<b>Task</b>	
<b>Planning Issues</b>	1) Determine scope of planning 2) Decide planning method 3) Initiate plan 4) Identify possible barriers, e.g., outstanding bills, substance abuse problems, etc.	
<b>Health</b>	1) Create list of supplies and medical equipment needs	

	<ol style="list-style-type: none"> <li>2) Complete OT evaluation and order equipment and/or seek funding</li> </ol>	
<b>Housing</b>	<ol style="list-style-type: none"> <li>1) Review type of housing, location and other preferences</li> <li>2) Locate housing</li> <li>3) Get on waiting lists</li> <li>4) List needs (furniture, supplies, etc.)</li> <li>5) Begin looking for resources</li> </ol>	
<b>Transportation</b>	<ol style="list-style-type: none"> <li>1) Apply for public transportation ID</li> <li>2) Explore options for transportation training</li> <li>3) Use public transportation</li> </ol>	
<b>Daily Living</b>	<ol style="list-style-type: none"> <li>1) Determine which tasks will require assistance</li> <li>2) Determine if training and therapies are needed for maximum independence</li> </ol>	

<b>Personal Finance</b>	1) Get Social Security Administration report to determine income post-discharge 2) Assess other income 3) Identify personal debts 4) Develop personal budget	
<b>Social Recreation</b>	1) Begin community activities. Seek to build community relationships (e.g. places of worship, clubs, friends, etc.) 2) Consider center for independent living peer support	
<b>Employment</b>	1) Think about as a possible planning issue	
<b>One Month Prior to the Move</b>		
<b>Issues</b>	<b>Task</b>	
<b>Planning Issues</b>	1) Review Plan	

	<ul style="list-style-type: none"> <li>2) Create to-do lists for yourself and your advocate</li> <li>3) Start contact person/phone list</li> </ul>	
<b>Health</b>	<ul style="list-style-type: none"> <li>1) Set up community doctor appointment one to three days post discharge</li> <li>2) Determine source and procedure for obtaining medical supplies. Find out how soon order can be places</li> </ul>	
<b>Housing</b>	<ul style="list-style-type: none"> <li>1) Solicit donations for needed household items and furniture</li> <li>2) Start securing or arranging for others to secure items</li> <li>3) Complete change of address with postal service</li> </ul>	
<b>Transportation</b>	<ul style="list-style-type: none"> <li>1) Make arrangements for transportation from nursing home to your home</li> <li>2) Check on status of ID card</li> </ul>	

<b>Daily Living</b>	<ol style="list-style-type: none"> <li>1) Determine hours of assistance required. Select care providers</li> <li>2) Contact your state's oversight agency and schedule evaluation for home help services</li> <li>3) If there are any unmet equipment needs, seek funding</li> </ol>	
<b>Personal Finance</b>	<ol style="list-style-type: none"> <li>1) Resolve personal debts</li> <li>2) Determine money that will be required for the move and enlist advocate to seek community resources</li> </ol>	
<b>Social Recreation</b>	<ol style="list-style-type: none"> <li>1) Continue community activities: Expand to other places</li> </ol>	
<b>One Week Prior to the Move</b>		
<b>Issues</b>	<b>Task</b>	
<b>Planning Issues</b>	<ol style="list-style-type: none"> <li>1) Review plan and update to-do list</li> </ol>	

	<ul style="list-style-type: none"> <li>2) Review move schedule</li> <li>3) Develop emergency contact list, copy to key people</li> </ul>	
<b>Health</b>	<ul style="list-style-type: none"> <li>1) Assure timely delivery of supplies and equipment</li> <li>2) If hospital bed is required, set up delivery date</li> <li>3) Change address with established doctors and Medicaid/insurance company</li> </ul>	
<b>Housing</b>	<ul style="list-style-type: none"> <li>1) Set up utilities and phone service</li> <li>2) Notify SSA, Medicaid worker, bank, etc. of address change</li> <li>3) Move belongings, if possible</li> <li>4) Review and prioritize what is still needed</li> </ul>	
<b>Daily Living</b>	<ul style="list-style-type: none"> <li>1) Determine personal assistant schedule. Make list of personal assistant tasks</li> </ul>	

	<ul style="list-style-type: none"> <li>2) Finalize arrangements with state personal assistant oversight agency and providers</li> <li>3) Food stamp application</li> </ul>	
<b>Personal Finance</b>	<ul style="list-style-type: none"> <li>1) Notify SSA and other agencies of address change</li> <li>2) Review budget</li> <li>3) Set up bank account near community home</li> </ul>	
<b>Social Recreation</b>	<ul style="list-style-type: none"> <li>1) Continue activities, peer support</li> </ul>	
<b>One-Two Days Prior to the Move</b>		
<b>Issues</b>	<b>Task</b>	
<b>Planning Issues</b>	<ul style="list-style-type: none"> <li>1) Make shopping list for food and personal items. Determine who will do the shopping</li> <li>2) Review move schedule and update to-do list</li> </ul>	

<b>Health</b>	<ol style="list-style-type: none"> <li>1) Confirm delivery of supplies, etc.</li> <li>2) Select pharmacy</li> <li>3) Obtain and fill prescriptions</li> </ol>	
<b>Housing</b>	<ol style="list-style-type: none"> <li>1) Confirm utility and phone hook-ups</li> <li>2) Buy phone, if needed. Ensure phone service is working</li> </ol>	
<b>Transportation</b>	<ol style="list-style-type: none"> <li>1) Confirm discharge transportation</li> </ol>	
<b>Daily Living</b>	<ol style="list-style-type: none"> <li>1) Confirm initial visits and schedule with personal assistant</li> <li>2) Obtain keys for personal assistance</li> <li>3) Obtain food and personal items adequate for several days (Check food banks)</li> </ol>	
<b>Personal Finance</b>	<ol style="list-style-type: none"> <li>1) Set up automatic deposit for SSI/SSDI checks (1-800-772-1213)</li> </ol>	

Day of the Move		
Issues	Task	
<b>Planning Issues</b>	1) Meet at facility to review discharge instructions 2) Update to-do list	
<b>Health</b>	1) Obtain discharge instructions 2) Obtain from facility medications and supplies 3) Review emergency contact list and procedures	
<b>Housing</b>	1) Set up home. Involve as many support people as possible	
<b>Daily Living</b>	1) Review emergency procedures and back up plans	
<b>Personal Finance</b>	1) If possible, have some cash available for unforeseen expenses	
<b>Social Recreation</b>	1) Meet neighbors and community support persons, as desired	

First Week After the Move		
Issues	Task	
<b>Planning Issues</b>	1) Review plan and outcomes 2) Revise plans as appropriate	
<b>Health</b>	1) Make appointment for medical follow-up care (dental, optical, etc.)	
<b>Housing</b>	1) Resolve any housing problems with landlord	
<b>Transportation</b>	1) Follow-up with transportation training. If not available, make other arrangements, e.g. peer trainer	
<b>Daily Living</b>	1) Brainstorm problem solving situations	
<b>Personal Finance</b>	1) Review and adjust budget	
<b>Social Recreation</b>	1) Continue community relationships and activities	

First Month After the Move		
Issues	Task	
<b>Planning Issues</b>	1) Review and revise plan 2) Confirm duties with other providers 3) Determine follow-up schedule (e.g. two visits/month)	
<b>Health</b>	1) Review and problem-solve any health issues	
<b>Housing</b>	1) Follow-up to ensure rent and utilities payments	
<b>Transportation</b>	1) Follow-up on transportation issues	
<b>Daily Living</b>	1) Review caregiver needs; plan for changes as appropriate	
<b>Personal Finance</b>	1) Pay first month's bills 2) Review and adjust budget as needed (e.g., monthly for three to six months)	

<b>Social Recreation</b>	1) Continue and expand community relationships	
<b>Employment</b>	1) Investigate work and volunteer options 2) Contact Vocational Rehabilitation	

\* This checklist was adapted with permission from ILRU/IL-NET and Going home: Nursing Home Transition Services in Michigan, 1998-2002, published by the Michigan Association of Centers for Independent Living (MACIL).