

California Care Home Move-In Organizer

A practical checklist for families preparing a loved one to move into a California residential care home.

Confirm the home's exact admission requirements before collecting documents. California RCFEs generally need a pre-admission appraisal and a physician-signed medical assessment; the facility should tell you which current forms and tests it requires.

Resident name

Facility

Planned move-in date

Primary family contact

Medical and care information

- ☐ Facility-required physician report or medical assessment completed and delivered.
- ☐ Current medication list includes name, dose, schedule, purpose, prescribing clinician, and pharmacy.
- ☐ Allergies, diagnoses, mobility limits, dietary needs, communication needs, and sleep routines documented.
- ☐ Medication supply, original labels, refill timing, pharmacy delivery, and controlled-medication process confirmed.
- ☐ Mobility aids, hearing aids, glasses, dentures, CPAP, oxygen, or other equipment labeled and checked.
- ☐ Primary care, specialists, preferred hospital, hospice or home-health contacts recorded when applicable.

Documents and contacts

- ☐ Photo identification and insurance / Medicare / Medi-Cal cards copied as requested.
- ☐ Emergency contacts and authorized representatives listed with current phone numbers.
- ☐ Signed advance health care directive and health-care agent information copied, if available.
- ☐ Financial power of attorney, conservatorship papers, POLST, or DNR documents copied only when applicable.
- ☐ Admission agreement, fee schedule, house policies, resident rights, and signed attachments copied for the family.
- ☐ Payment method, due date, deposit, refunds, rate changes, extra charges, and move-out terms confirmed in writing.

Clothing, room, and personal items

- ☐ Comfortable clothing, shoes, sleepwear, coat, and personal-care supplies packed and labeled.
- ☐ Room measurements and allowed furniture / decorations confirmed before delivery.
- ☐ Favorite photos, music, blanket, chair, hobbies, or familiar objects chosen with the resident.
- ☐ Valuables inventoried; irreplaceable jewelry, cash, and sensitive papers stored safely elsewhere unless needed.
- ☐ Phone, charger, contacts, hearing-aid batteries, and preferred communication tools prepared.
- ☐ Laundry, linens, toiletries, incontinence supplies, and replacement responsibilities confirmed.

Personal routines that help staff

Preferred name / language

Morning and bedtime routine

Foods enjoyed / avoided

Calming strategies

Interests and meaningful activities

Move-in day

- ☐ Bring medications and paperwork exactly as the facility instructed.
- ☐ Review the room, belongings inventory, emergency contact, and initial care plan with staff.
- ☐ Confirm who will call the family after the first night and who is the ongoing point of contact.
- ☐ Keep the resident involved in choices and allow time to settle without an overcrowded visit.
- ☐ Take home unnecessary valuables, duplicate paperwork, and packing materials.

First week follow-up

- ☐ Ask the resident privately how meals, sleep, care, and staff interactions feel.
- ☐ Confirm medications and equipment arrived and are being handled as planned.
- ☐ Review any new concern, unexpected charge, missed routine, fall, or health change promptly.
- ☐ Schedule the first care-plan check-in: _____

If a resident has a care, safety, or rights concern, contact the local Long-Term Care Ombudsman or call California's 24/7 hotline at 800-231-4024. Call 911 for immediate danger.

Educational organizer only. Follow instructions from the selected facility and qualified medical or legal professionals. Requirements and circumstances vary. Sources reviewed September 2026.