

Texas Care Home Move-In Organizer

A practical checklist for families preparing a loved one to move into a Texas Type A or Type B assisted living facility.

Confirm the selected home's exact admission requirements before collecting documents. Required assessments, clinician forms, tests, agreements, and timelines can depend on the resident's needs and the facility's license.

Resident name

Facility

Planned move-in date

Primary family contact

Medical and care information

- ☐ Facility-required assessment, clinician report, or medical information 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 / Medicaid cards copied as requested.
- ☐ Emergency contacts and authorized representatives listed with current phone numbers.
- ☐ Signed advance directive and health-care agent information copied, if available.
- ☐ Financial power of attorney, guardianship papers, medical orders, 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: _____

For resident-rights or care concerns, contact the Texas Long-Term Care Ombudsman Program: 800-252-2412. Call 911 for immediate danger.

Official advance-directive resource: Texas HHS Advance Directives forms - <https://www.hhs.texas.gov/formas/advance-directives>

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