



TRANSITION TO  
**Continuing Care Health Services** Handbook

  
**Charlestown**  
BY ERICKSON SENIOR LIVING®

Dear Charlestown Residents and Family Members,

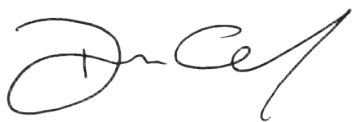
This transition handbook is designed to help residents and family members handle the steps necessary when a resident moves out of an independent living residence into continuing care health services. Hopefully, this information will help you and your family navigate through the process smoothly. This package is not a contract but merely guidelines and information for you and your family. Your Residence and Care Agreement is the definitive agreement between you and the community and is not amended or changed by this package.

We recommend that you take the time to review the information in this handbook carefully and then pass it along to any family member or individual who may be assisting you with your transition into continuing care health services. This package may be revised or updated as necessary.

We appreciate the valuable input we have received from residents and their families over the years. We hope that you find the information in this handbook helpful to both you and your family.

Respectfully,

Don Grove

A handwritten signature in black ink, appearing to read "Don Grove", with a stylized, flowing script.

Executive Director

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## Part 1 — Frequently Asked Questions

### **1. Who is my contact person during the independent living move-out process?**

The Charlestown® move-out coordinator is your main contact. The move-out coordinator handles the details related to donating items, terms of the residence refurbishment, connecting you to any needed resources, and the scheduling of the furniture move.

### **2. How will the billing be handled as I transition to my continuing care residence?**

You are financially responsible for the independent living residence until you turn in keys to the move-out coordinator and complete the Unit Release Transfer Form. Section 8.5 of your Residence and Care Agreement details the terms of your responsibility. A non-occupancy credit will appear on your billing statement, if you continue to keep possession of the independent living residence after you physically transfer to continuing care health services. This credit recognizes that some resources/services are no longer being utilized for the independent living residence. The new monthly fee or daily fee for your suite in continuing care health services will start on the day you take keys and sign a reservation agreement.

### **3. How long do I have to release and vacate the independent living residence?**

It is in your benefit to complete the move from the independent living residence as soon as reasonably possible. You are responsible for the Monthly Service Package minus a non-occupancy credit until the keys are turned in.

### **4. What happens to my entrance fee?**

The entrance fee will remain in place during your stay in continuing care health services, essentially following you through all levels of care. The entrance fee will remain available, if needed, for the resident's maintenance and support, as described in Section 10 of the Residence and Care Agreement.

### **5. What does the refurbishing charge include for my independent living residence?**

Per Section 9.4 of your Residence and Care Agreement, the refurbishing fees are derived from the work needed to return your independent living residence back into like-new condition. The work will include painting, re-carpeting or re-flooring, cleaning, and other work. For certain work like painting, carpeting or flooring, and cleaning, the refurbishing

charge is based on the square footage of the residence. For work to repair or to address extraordinary damage, the costs depend upon the amount of work to be done. For residents with a 90% refundable model agreement, the community may cover a certain portion of the refurbishing costs. For additional information please see Part 7 of this transition handbook.

**6. How is mail handled at continuing care health services?** We will deliver residents' mail directly to their residences when it arrives at the front desk. Residents have the choice of either receiving their own mail, or forwarding it to a responsible party's address through USPS. As a result, we recommend forwarding mail, through USPS, to the responsible party's primary address. For the select mail that the resident wants to receive, you can change the shipping address individually for those mail items. You can forward mail to the responsible party's address at [www.usps.com](http://www.usps.com).

**7. How do I transfer my phone and cable service to continuing care health services?** If you have already enrolled in the Charlestown Connect phone and internet system, we can transfer the phone number from your independent living residence for assisted living residents. Memory care residents will receive a new phone number as they are already pre-programmed in the memory care residences. If you are still with an outside provider (i.e., Verizon) you will be given a new phone number and enrolled in the Charlestown Connect program. Basic cable is included in continuing care health services. Assisted living and memory care residences have permanent boxes installed providing basic cable to our residents at no extra charge. If you would like to purchase any upgraded Comcast services, please call the bulk number at 855-638-2855 and they will send a tech out to give you an additional box in your name. Otherwise, you may return your independent living cable box back to Comcast.

## Part 2 — Checklist: Independent Living Move-Out

Use this checklist to keep track of where you are in the transition process. If you have questions or concerns, please do not hesitate to call the move-out coordinator.

- ☐ Complete the Unit Transfer Form provided by move-in coordinator via DocuSign.
- ☐ Call to schedule a move date with the health care sales team. Please provide the name of the moving company, time, and date. Move dates are scheduled on a first-come, first-served basis. Please note that tractor trailers are not allowed on the Charlestown grounds so please plan accordingly. Your physical arrival to continuing care health services needs to be scheduled separately with the continuing care health services sales team (residents need to physically arrive Monday-Thursday).
- ☐ Call the move-out coordinator to schedule a time to turn in keys. During this time, you will sign the move out documentation.
- ☐ Cancel or transfer all newspaper subscriptions.
- ☐ Complete change of address for your mail (see FAQ for more details).
- ☐ Remove all items from the residence. You may donate unwanted items to the donation centers. Direct contact numbers are listed toward the end of this packet.
- ☐ For large amounts of bagged trash you can:
  - Call General Services at 443-297-3783 between the hours of 8:00 a.m.–4:30 p.m. Monday–Friday to request a special pick-up. At all other times, please call 410-737-8838 ext. 601-8320. Standard housekeeping rates apply.
  - Take items to the nearest trash room in your building.
  - Leave the trash in the hallway the morning of trash pick-up according to the schedule for your building.

- ☐ Return and/or transfer rented items, such as oxygen, rented wheelchairs, etc.
- ☐ Storage bins must be emptied out prior to turning in keys. If emptied before keys are turned in, please notify **General Services at 443-297-3783**. Turn in the storage keys to either the front desk or the move-out coordinator.
- ☐ When no longer needed, reserved parking spaces can be released by contacting **General Services at 443-297-3783**.
- ☐ If there is an emergency alert system, either bracelet or necklace, please return to the front desk. The pull cords in the units will remain. If you have lost the emergency press alert, please notify **General Services at 443-297-3783** to let them know, so that billing will be stopped.
- ☐ Recurring housekeeping services should be canceled with the **General Services department at 443-297-3783**.
- ☐ Please note that any items left in the unit, after keys have been turned in, become the property of Charlestown and you will be charged for removal. Standard housekeeping rates apply for assistance with disposal of items.
- ☐ Once the residence is completely empty, transfer the renters insurance policy.

## Part 3 — Recommended Items for Continuing Care Health Services

We suggest you label personal belongings with resident's name, including eyeglasses, hearing aids, appliances, durable medical equipment (wheelchairs, walkers' cane), and clothing. Renters insurance is required to cover your personal possessions.

**1. Toiletries:** Bring personal items such as toothbrush and toothpaste, mouthwash, denture care, shaving cream, razor, soap, lotion, comb, brush, shampoo, and conditioner. Charlestown provides incontinence products.

**2. Clothing:** We recommend a minimum of two weeks' supply of machine washable clothing, which is loose fitting and suitable for the current season. It is important to remove clothing that does not fit or is worn and update the inventory as needed. Suggested items are slacks, T-shirts, dresses, shoes, coat (suitable for the season), pajamas (5 pair), slippers, bathrobe, undergarments (7-day supply), socks (7-day supply). Please label all clothing with first and last name.

**3. Durable Medical Equipment:** Please bring all necessary equipment including walkers, wheelchairs, and canes.

**4. Personal Belongings:** Furnishings and decorative items are welcomed and encouraged to personalize your residence.

**5. Valuables:** Residents and families are encouraged not to bring valuables such as cash, credit cards, checkbooks, or expensive jewelry. Cash is not required for any service rendered and ancillary services can be billed directly to your monthly statement.

**6. Furniture:** This varies by care setting. Nursing care suites are fully furnished (hospital bed, night stand, lamps, dresser, TV, armchair, bistro table, and chairs). Personal furniture can be used in the nursing care rooms as long as it fits with the existing furniture.

For assisted living and memory care, residents furnish the space themselves for a home-like experience.

**7. Linens:** This varies by care setting. Long-term care residents are provided a bed spread, pillows and blankets, and bath towels. For assisted living and memory care, residents are expected to provide their own bed and bath linens.



## Tips to Remember

Furnishings and decorative items from home are welcomed and encouraged for our new resident to bring to promote a home-like atmosphere.

Please do not bring electric blankets, space heaters, electric heating pads, toaster ovens, area rugs, hot plates, irons, etc. Each resident will be assessed to determine if they can safely use appliances such as coffee maker, microwave, etc. Extension cords are not permitted.

All medications that are administered by staff need to be given to the nurse manager on admission day. This includes all over-the-counter medications such as Tylenol, vitamins, Benadryl, etc. If you have a medication cassette, bring it to CVS prior to the move and they will put the medications in prescription bottles and give them to you to bring to our nurses. We can use the medication as long as they are in prescription bottles, but we cannot administer directly out of a cassette.

## Part 4 — Refurbishing Fees

In accordance with Section 9.4 of the Residence and Care Agreement, the resident is required to pay the refurbishing charges to Charlestown to cover the reasonable cost of cleaning and refurbishing the home to a like-new condition when vacating an independent or assisted living residence, which includes memory care residences. For residents with a 90% refund model, the community may cover a certain portion of the refurbishing charges. As always, you should carefully read your own Residence and Care Agreement to understand the requirements.

There are several components associated with restoration of a residence back to a like-new, restored condition. **Please note that the final bill doesn't break out the refurbishing charges. It's just one fee.** For your better understanding, we have created an explanation of some of these components below:

**1. Restoration fees:** The Charlestown staff and contractors professionally complete residence unit restorations at Charlestown. Restoration means putting the unit back to its original marketable condition without customizations. The unit was put in the same condition before you or your family member moved into the residence. We provide restorations to baths, flooring, plumbing, electrical, heating, all interior painting, and repairs.

**2. Maintenance fees:** Includes wall preparations such as patching holes and drywall damages, all painting preparations such as the removal and reinstallation of outlet and wall switch cover plates, door hardware, caulking, light fixtures, room and closet doors, shelving, and similar

items installed in the residence. We may replace ceiling fixtures, rebuild or replace plumbing fixtures (as required). We inspect and adjust all windows to open, shut, and lock properly. Screens are replaced as needed. Smoke detectors and life safety devices will be inspected. Cabinet and bifold doors will be checked and adjusted. Any replacements considered normal wear associated to these items are included in this maintenance cost.

**3. Flooring/carpet replacement:** It is important to understand that we will always replace carpet regardless of the length of occupancy. A new carpet was also in place when you or your family member moved into the home. Flooring work includes removal of carpet, pad,

and replacement of both with our designated standard replacement products and may include replacement of vinyl composite floor coverings (VCT) or ceramic tile in bathroom(s). If replacement of VCT or ceramic tile in one of the rooms is needed, all rooms having such flooring are replaced to keep the same uniform appearance.

**4. Painting:** The cost of paint, materials, and labor to repaint the unit to a designated standard color is included in this charge. Again it is important to understand that we will always repaint regardless of the length of occupancy. If any of the unit's surfaces require a primer or a second coat for proper coverage, then this will result in an added cost. Similarly, the removal of wallpaper and borders will result in an added cost. Upgraded custom paint is subject to being repainted regardless of color and the standard paint will be applied, which could result in an added cost.

**5. Housekeeping fees:** This includes the supervision, labor and materials to apply care, and servicing of property and equipment to complete a full deep cleaning of the residence. After all restoration work is completed, this cleaning will include a detailed cleaning of the cabinets, flooring, light fixture covers, counter surfaces, windows, and both vanity and bathroom enclosures. A professional contractor may be used to restore minor damages, as well as steam cleaning grout around ceramic tiles (if applicable) at our discretion.

**6. Customizations:** Custom items to personalize the unit must be removed. We cannot issue a credit to the outgoing resident. The cost to remove such items will be charged to the outgoing resident. Please note the fees associated with the removal of custom fixtures are not included in the standard refurbishing fee estimate. Please contact your health care counselor if you have questions.

## Part 5 — Unit Release — Transfer Addendum

When a resident transfers from one unit to another, the Unit Transfer Addendum form needs to be completed and signed. Examples include moving from an independent living unit to a continuing care health services unit, transfers from one continuing care health services unit to another continuing care health services unit, and transfers to another Erickson Senior Living® community.

- Legally begins the process of relinquishing the unit
- Establishes the departure date from the original unit
- Provides marketing team a snapshot of when their team can begin showing a forthcoming model/floor plan
- Provides the resident or legal representative with an estimate of the refurbishing fee
- States where the resident will be moving to
- States the new monthly fee and entrance fee
- For independent and assisted living units, this provides the resident or legal representative with an estimate of the refurbishing fee

In an effort to reserve the unit as quickly as possible by a new prospective resident, the Unit Transfer Addendum form is generally completed before the keys have been turned in.

**Move-in coordinator will provide this form via DocuSign.**



## Important Information for Movers

Due to size restraints we cannot allow trucks over 32 feet, bumper to bumper. If you have an interstate or long-distance move, please make sure your movers are prepared for this situation. Our site cannot accommodate a truck longer than 32 feet.

- We cannot lock down elevators for a move; movers must know they will be sharing the elevator with residents.

## Part 6 — Important Resources and Vendors

### MOVING COMPANIES

Charlestown recommends using a senior move management company. Speak to the health care sales team to learn about our preferred moving providers.

Our preferred moving providers offer the following services:

- Sorting items
- Packing
- Moving
- Disposal of trash
- Delivery of donations
- Auction content
- Storage
- Decluttering



## Part 7 — Contact List

### Charlestown Contact List

The main number for Charlestown is 410-737-8838, which is the front desk where personnel are available 24 hours a day. If you are unsure about which department to contact, they can help you.

**Below are telephone numbers for other areas you might find useful:**

| Questions Regarding                 | Department                 | Phone Number  |
|-------------------------------------|----------------------------|---------------|
| Main Phone Number                   | Front Desk                 | 410-737-8838  |
| Transition Process                  | Health Care Sales          | 410-737-8923  |
| Continuing Care Billing             | Business Office Manager    | 443-297-3347  |
| Social Worker/Grief Support         | Resident Life              | Ext. 601-8230 |
| Donating Items                      | Philanthropy               | 410-737-8892  |
| Access to Residence                 | Security                   | Ext. 601-8806 |
| Independent Living Unit<br>Closeout | Independent Living Finance | 443-297-3711  |



**Charlestown**  
BY ERICKSON SENIOR LIVING®

709 Maiden Choice Lane  
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[CharlestownCommunity.com](http://CharlestownCommunity.com)

Independent Living | Inpatient and Outpatient Rehabilitation  
Assisted Living | Memory Care | Nursing Care