

# Senior living risk pathway checklist

## Clinical and operational risk — template (2026)

Facility/community:

Location:

Reviewer:

Date:

Review frequency (monthly/quarterly):

Next review due:

### Instructions:

Use this checklist during governance reviews, audits and tabletop exercises. Mark each item as Compliant (✓), Needs action (■) or Not applicable (NA). Capture notes and owners for follow-up.

### Clinical risk pathway

Risk control/activity	Status	Owner	Due date	Notes
Care plans updated and individualized; interdisciplinary review completed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Medication management: Reconciliation, high-risk meds double-check, MAR audit	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Infection prevention: Hand hygiene audit, isolation protocols, outbreak log	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fall prevention: Screening, assistive devices, post-fall huddles	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pressure injury prevention: Risk scoring, turning schedules, audits	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Behavioral health and dementia care protocols; elopement risk controls	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Incident reporting: Timely entry, root-cause analysis, corrective actions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Consent and advance directives verified and documented	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Clinical documentation standards: Completeness, timeliness, EHR quality checks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Quality metrics monitored: Hospital transfers, adverse events, satisfaction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Operational risk pathway

Risk control/activity	Status	Owner	Due date	Notes
Staffing levels meet acuity needs; skill mix and ratios tracked				
Onboarding and annual competencies completed; Training records current				
Emergency operations plan: Command roles, communications, resource staging				
Drills/tabletop exercises conducted (e.g., hurricane, infectious disease, active threat)				
Cybersecurity controls: MFA enforced, phishing training, backups tested				
Physical security: Access controls, CCTV, visitor management, incident log				
Vendor and supply chain risk: Credentialing, SLAs, contingency sourcing				
Regulatory compliance: CMS/HIPAA/state audits prepared; corrective action log				
Risk financing: Insurance coverage reviewed; claim trends and reserves assessed				
Financial stewardship: Reimbursement monitoring, budget variance review				

Action register (for items marked ■)

Issue/gap	Action required	Owner	Target date	Status

Sign-off

Clinical leader:

Operational leader:

Date: