

PROFESSIONAL CHECKLIST · FOR AGING IN PLACE SERVICE PROVIDERS

Using AI Responsibly in Your Aging in Place Business

A three-step fact-checking system to use before AI-generated information reaches a client recommendation.

1 FIND IT
Ask for sources**2 CHALLENGE IT**
Cross-check independently**3 CONFIRM IT**
Open the original source

AI can be a wonderful research assistant – summarizing complicated information, suggesting places to look, and explaining unfamiliar terminology. But AI is not an authority. It can misunderstand a regulation, rely on outdated information, misrepresent a source, or confidently provide a citation that does not support the claim. Because our recommendations can affect a client's health, safety, finances, and legal compliance, use this checklist whenever AI-generated information will shape professional advice.

Question being researched: _____

Client / project: _____ Date: _____

AI tool #1: _____ AI tool #2: _____

1 Before You Start: Know What's at Stake

Check every area the answer could affect. These are not harmless trivia questions – an inaccurate answer can mean an unsafe installation, an unexpected expense, a denied claim, or a recommendation that does not meet the client's needs.

☐ Client safety☐ Project costs☐ Code compliance☐ Product selection☐ Medicare expectations☐ Professional credibility

If you checked any box, complete all three steps before using the answer professionally. AI can help begin the research, but it should not be the final stop.

2 Step One – Ask for Sources

FIND IT

☐ Confirm the AI tool has live web access.

If it does not, it cannot reliably confirm what is current today.

- ☐ **Ask it to search current sources** rather than answer from general knowledge, which may be incomplete or outdated.
- ☐ **Request a citation for every important claim.**
- ☐ **Name the source types you want:** government agencies, professional standards, state licensing boards, peer-reviewed research, and manufacturer documentation.
- ☐ **Ask for the publication or revision date** of each source.
- ☐ **Ask it to flag anything that varies** by state, locality, product, or individual circumstances.
AI frequently blends guidelines, laws, building codes, best practices, and clinical recommendations that are not interchangeable.
- ☐ **Remember: a citation is a trail to follow, not proof.** A cited answer is not automatically a correct one.

INSTEAD OF ASKING

"What are the requirements?"

ASK THIS

"Search the web and explain the current requirements. Cite the source supporting each important claim."

Research Prompt Template

Copy this and replace [topic]. It adapts to almost any aging in place question.

Search the web for current information about [topic]. Use primary or official sources whenever possible. Cite the source for every major claim. Include the publication or revision date when available. Clearly identify anything that varies by state, locality, product, or individual circumstances.

Example in practice: "Search the web for current information about wheelchair ramp requirements for a private residence in Georgia. Use government, state, and local sources whenever possible. Cite every major claim. Separate ADA guidance from residential building-code requirements, and identify anything that varies by jurisdiction."

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Step Two – Cross-Check Independently

CHALLENGE IT

- ☐ **Open a second research tool** (such as Perplexity) and ask the original question in a neutral way.
- ☐ **Do not paste the first AI response into the second tool** and ask it to verify.
That can encourage the second tool to follow the first response's assumptions and framing.
- ☐ **Invite contradictory information.** Ask: "What do current sources say about this topic? Include anything that contradicts common recommendations."
- ☐ **Compare the two answers** point by point using the comparison table.

Compare	Tool #1 says	Tool #2 says	Match?
Measurements			☐
Dates			☐
Populations covered			☐
Legal applicability			☐
Exceptions			☐
Sources used			☐

Disagreement does not automatically tell you which answer is wrong – it tells you exactly what needs closer investigation.

Watch for Agreement Without Independence

Agreement between two AI tools can feel reassuring, but it is not proof. Before you relax, check for:

- ☐ **The same website.** Both tools may be citing the same flawed secondary source.
- ☐ **An outdated article.** A frequently repeated misconception can persist across AI training data.
- ☐ **A rule of thumb presented as a requirement.** Is it a legal requirement, a best practice, or merely a commonly quoted recommendation?
- ☐ **Misapplied standards.** The 2010 ADA Standards govern state and local government facilities and public accommodations – not every privately owned single-family home. Project location, use, funding, and applicable codes must all be considered.

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Step Three – Open the Original Source

CONFIRM IT

This is the step that actually confirms the information. Do not rely on the AI's summary – click the link and verify each of the following.

- ☐ **Does the page exist?**
The link is live and belongs to the official organization's website.
- ☐ **Is the information current?**
The publication or revision date shows the guidance has not been superseded.
- ☐ **Does it say what the AI claimed?**
The source supports the specific claim – not just the general topic.
- ☐ **Does it apply to your client?**
Check for qualifications, exceptions, or scope limitations – such as public vs. private facilities.

Step Three, continued: Record the Source You Confirmed

Source / organization: _____

Link: _____

Publication / revision date: _____ Section or page: _____

5 Know Where to Look

The right source depends on the question. Use the authoritative source – not a blog or an equipment seller's interpretation – so your recommendation is accurate and defensible. Check off the source you used.

Question type	Start with	Used
Accessibility standards	ADA.gov and the U.S. Access Board	☐
Medicare coverage	Medicare.gov and CMS – not a home care agency's blog	☐
Fall prevention	CDC STEADI materials	☐
Professional scope or licensing	Your state licensing board	☐
Building requirements	State or local building authority	☐
Product capacity or installation	The manufacturer's manual for the exact model	☐
Clinical effectiveness	Peer-reviewed research	☐

A note on ANSI standards: they may also be important, but access may require purchasing the standard. Confirm whether a particular edition has been adopted into the applicable state or local code.

6 Define the Question Before You Trust a Number

Ask AI for the correct height of a bathroom grab bar and it may give a precise measurement that sounds definitive – while important context is missing. Before relying on any measurement, identify the question actually being answered:

- ☐ **What type of grab bar?**
Horizontal beside a toilet, vertical at a shower entrance, or inside a bathtub?
- ☐ **Where will it be installed?**
Private residence, assisted living, medical facility, or public building?
- ☐ **Which code or standard applies?**
A code-compliant placement may still not be the best functional placement for a particular client.
- ☐ **Who will use it?**
A highly individualized placement may not satisfy requirements governing a regulated facility.

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Red Flags: Slow Down and Investigate

If the answer could influence a client's safety, finances, or legal obligations, "the AI said so" is not adequate documentation. Check any flag you spot:

- ☐ **Universal language** — "always," "never," or "guaranteed," especially about legal compliance, insurance coverage, or medical outcomes.
- ☐ **"ADA approved" products** — products are generally not individually approved or certified by the ADA, regardless of what marketing language claims.
- ☐ **No dates or sections** — a measurement is given, but the tool cannot identify the applicable standard, section, or publication date.
- ☐ **Blogs or sales pages** cited as the source.
- ☐ **Guidance presented as law** — a recommendation described as a requirement.
- ☐ **One-size-fits-all advice** — the same recommendation made for every client regardless of context.

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Final Sign-Off Before It Reaches Your Client

- ☐ **Find it:** I asked for sources using a tool with live web access.
- ☐ **Challenge it:** I ran a neutral cross-check in a second tool and investigated every discrepancy.
- ☐ **Confirm it:** I opened the original source and confirmed it exists, is current, and says what the AI claimed.
- ☐ **The source applies** to this client, this home, and this jurisdiction.
- ☐ **No red flags remain** unresolved.
- ☐ **I documented the source** in the client or project file.

Reviewed by: _____ Date: _____

Find it. Challenge it. Confirm it.

AI can make us faster. But we remain responsible for the recommendations we give our clients. **AI assists with research. It does not assume professional responsibility.**

This checklist is an educational tool for aging in place professionals. It does not replace applicable codes and standards, legal advice, or your own professional judgment. Always confirm requirements with the authority having jurisdiction.