ELDERHEARTH · PERSONAL PLANNING COPY

Walk-in tub installation checklist

TEACHING EXAMPLE. Fictional bathroom and model review for practice. Not a real customer project or a professional inspection.

Model: _____ Bathroom: _____ Date: _____

The bather

Item	Status	Evidence or note
Wants to use a tub and will use it regularly	■ Yes ☐ No ☐ To confirm	Discussed with bather
Can sit through the fill and drain cycle	☐ Yes ☐ No ■ To confirm	Practice with the exact model and supervision still needed
Can transfer with the help available at home	☐ Yes ☐ No ■ To confirm	Therapist to observe transfer
Someone is home during bathing	☐ Yes ☐ No ■ To confirm	Adult child works from home; bathing coverage not confirmed
A clinician or therapist was asked about transfer and supervision	☐ Yes ☐ No ■ To confirm	OT appointment pending; discussion not yet held

Model and drawing

Item	Status	Evidence or note
Exact model and configuration confirmed	■ Yes ☐ No ☐ To confirm	Transfer32, 32 x 52, left-hand door
Specification sheet or drawing received	☐ Yes ☐ No ■ To confirm	Ask Ella for the current drawing
Seat width and height checked against the bather	☐ Yes ☐ No ■ To confirm	24 inch width recorded; seat height and transfer still to check
Door swing and clear floor space checked	☐ Yes ☐ No ■ To confirm	Measure clear floor space; the 36 inch opening is the tub door, separate from room clearance
Threshold height and lowering option confirmed	☐ Yes ☐ No ■ To confirm	Decide on 4.5 inch lowering option
End panel count and layout confirmed	■ Yes ☐ No ☐ To confirm	Two panels for alcove
Drain and supply locations checked	☐ Yes ☐ No ■ To confirm	Plumber to measure on site
Service access clearance confirmed	☐ Yes ☐ No ■ To confirm	Ask for service clearance

Path and delivery

Item	Status	Evidence or note
Exterior door, steps, gate measured	■ Yes ☐ No ☐ To confirm	32 inch gate is the tight point
Interior doorways and turns measured	■ Yes ☐ No ☐ To confirm	Hall turn is 34 inches
Stairs, landing, elevator checked	■ Yes ☐ No ☐ To confirm	No stairs, one threshold

Item	Status	Evidence or note
Packaged dimensions confirmed in writing	☐ Yes ☐ No ■ To confirm	Need crate size from Ella
Curbside delivery and liftgate confirmed	■ Yes ☐ No ☐ To confirm	Quote line shows liftgate
Who brings the tub inside named in writing	☐ Yes ☐ No ■ To confirm	Installer to confirm crew
Floor protection planned	■ Yes ☐ No ☐ To confirm	Plywood and blankets

Room services

Item	Status	Evidence or note
Plumber reviewed drain and supply	☐ Yes ☐ No ■ To confirm	Quote pending
Electrician reviewed the model manual and circuit	☐ Yes ☐ No ■ To confirm	Manual not yet sent
Dedicated GFCI-protected circuit confirmed for this configuration	☐ Yes ☐ No ■ To confirm	Electrician to confirm from the manual
Circuit count, amperage, and outlet location confirmed from the manual	☐ Yes ☐ No ■ To confirm	Manual not yet reviewed
Water heater capacity and recovery checked	☐ Yes ☐ No ■ To confirm	Check tank recovery rate
Ventilation and moisture control checked	☐ Yes ☐ No ■ To confirm	Fan works, assess upgrade
Local code and permit requirements checked	☐ Yes ☐ No ■ To confirm	Call building department

Responsibilities

Item	Status	Evidence or note
Freight delivery owner named	☐ Yes ☐ No ■ To confirm	Ask carrier and installer to name the contact
Bring-in and damage responsibility named	☐ Yes ☐ No ■ To confirm	Ask installer and carrier
Placement and setting owner named	☐ Yes ☐ No ■ To confirm	No installer contract yet
Plumbing and electrical trades named	☐ Yes ☐ No ■ To confirm	Contractor to name subs
Permit and inspection owner named	☐ Yes ☐ No ■ To confirm	Likely contractor, confirm
Pre-install leak and equipment test before closing walls	☐ Yes ☐ No ■ To confirm	Add to installer scope
Visible shipping damage recorded at delivery	☐ Yes ☐ No ■ To confirm	Plan photos and delivery receipt
Hidden damage inspected and reported within the carrier window	☐ Yes ☐ No ■ To confirm	Check carrier deadline
Freight damage claim deadline confirmed	☐ Yes ☐ No ■ To confirm	Ella page states 48 hours; confirm for this order
Final fill, drain, and leak check owner named	☐ Yes ☐ No ■ To confirm	Installer role proposed; contract and attendance pending

Item	Status	Evidence or note
Follow-up repair contact named	☐ Yes ☐ No ■ To confirm	Ask for warranty contact

Construction scope

Item	Status	Evidence or note
Demolition and disposal included or excluded in writing	☐ Yes ☐ No ■ To confirm	Not in manufacturer quote
Wall, floor, waterproofing, and tile scope written	☐ Yes ☐ No ■ To confirm	Depends on opening
Trim, paint, and cleanup written	☐ Yes ☐ No ■ To confirm	
Exclusions and change-order rate written	☐ Yes ☐ No ■ To confirm	Ask hourly rate
Start date, duration, and payment schedule written	☐ Yes ☐ No ■ To confirm	No install quote yet
Labor warranty and who honors it written	☐ Yes ☐ No ■ To confirm	Ask contractor

Before paying

Item	Status	Evidence or note
Current quote and expiry date saved	■ Yes ☐ No ☐ To confirm	Valid through October 29, 2026
Return, cancellation, and restocking terms read	☐ Yes ☐ No ■ To confirm	Read invoice terms
Warranty documents read	☐ Yes ☐ No ■ To confirm	Ask for model warranty
Tax question answered for this delivery	☐ Yes ☐ No ■ To confirm	Out-of-state delivery, check use tax
Model drawing and installation scope attached to the order	☐ Yes ☐ No ■ To confirm	Before paying

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