ELDERHEARTH · PERSONAL PLANNING COPY

Walk-in tub installation checklist

> Complete this with the model drawing and the contractor before paying. Every item marked to confirm stays open until someone puts the answer in writing.

Model: _____ Bathroom: _____ Date: _____

The bather

Item	Status	Evidence or note
Wants to use a tub and will use it regularly	☐ Yes ☐ No ☐ To confirm	
Can sit through the fill and drain cycle	☐ Yes ☐ No ☐ To confirm	
Can transfer with the help available at home	☐ Yes ☐ No ☐ To confirm	
Someone is home during bathing	☐ Yes ☐ No ☐ To confirm	
A clinician or therapist was asked about transfer and supervision	☐ Yes ☐ No ☐ To confirm	

Model and drawing

Item	Status	Evidence or note
Exact model and configuration confirmed	☐ Yes ☐ No ☐ To confirm	
Specification sheet or drawing received	☐ Yes ☐ No ☐ To confirm	
Seat width and height checked against the bather	☐ Yes ☐ No ☐ To confirm	
Door swing and clear floor space checked	☐ Yes ☐ No ☐ To confirm	
Threshold height and lowering option confirmed	☐ Yes ☐ No ☐ To confirm	
End panel count and layout confirmed	☐ Yes ☐ No ☐ To confirm	
Drain and supply locations checked	☐ Yes ☐ No ☐ To confirm	
Service access clearance confirmed	☐ Yes ☐ No ☐ To confirm	

Path and delivery

Item	Status	Evidence or note
Exterior door, steps, gate measured	☐ Yes ☐ No ☐ To confirm	
Interior doorways and turns measured	☐ Yes ☐ No ☐ To confirm	
Stairs, landing, elevator checked	☐ Yes ☐ No ☐ To confirm	

Item	Status	Evidence or note
Packaged dimensions confirmed in writing	☐ Yes ☐ No ☐ To confirm	
Curbside delivery and liftgate confirmed	☐ Yes ☐ No ☐ To confirm	
Who brings the tub inside named in writing	☐ Yes ☐ No ☐ To confirm	
Floor protection planned	☐ Yes ☐ No ☐ To confirm	

Room services

Item	Status	Evidence or note
Plumber reviewed drain and supply	☐ Yes ☐ No ☐ To confirm	
Electrician reviewed the model manual and circuit	☐ Yes ☐ No ☐ To confirm	
Dedicated GFCI-protected circuit confirmed for this configuration	☐ Yes ☐ No ☐ To confirm	
Circuit count, amperage, and outlet location confirmed from the manual	☐ Yes ☐ No ☐ To confirm	
Water heater capacity and recovery checked	☐ Yes ☐ No ☐ To confirm	
Ventilation and moisture control checked	☐ Yes ☐ No ☐ To confirm	
Local code and permit requirements checked	☐ Yes ☐ No ☐ To confirm	

Responsibilities

Item	Status	Evidence or note
Freight delivery owner named	☐ Yes ☐ No ☐ To confirm	
Bring-in and damage responsibility named	☐ Yes ☐ No ☐ To confirm	
Placement and setting owner named	☐ Yes ☐ No ☐ To confirm	
Plumbing and electrical trades named	☐ Yes ☐ No ☐ To confirm	
Permit and inspection owner named	☐ Yes ☐ No ☐ To confirm	
Pre-install leak and equipment test before closing walls	☐ Yes ☐ No ☐ To confirm	
Visible shipping damage recorded at delivery	☐ Yes ☐ No ☐ To confirm	
Hidden damage inspected and reported within the carrier window	☐ Yes ☐ No ☐ To confirm	
Freight damage claim deadline confirmed	☐ Yes ☐ No ☐ To confirm	
Final fill, drain, and leak check owner named	☐ Yes ☐ No ☐ To confirm	

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

Construction scope

Item	Status	Evidence or note
Demolition and disposal included or excluded in writing	☐ Yes ☐ No ☐ To confirm	
Wall, floor, waterproofing, and tile scope written	☐ Yes ☐ No ☐ To confirm	
Trim, paint, and cleanup written	☐ Yes ☐ No ☐ To confirm	
Exclusions and change-order rate written	☐ Yes ☐ No ☐ To confirm	
Start date, duration, and payment schedule written	☐ Yes ☐ No ☐ To confirm	
Labor warranty and who honors it written	☐ Yes ☐ No ☐ To confirm	

Before paying

Item	Status	Evidence or note
Current quote and expiry date saved	☐ Yes ☐ No ☐ To confirm	
Return, cancellation, and restocking terms read	☐ Yes ☐ No ☐ To confirm	
Warranty documents read	☐ Yes ☐ No ☐ To confirm	
Tax question answered for this delivery	☐ Yes ☐ No ☐ To confirm	
Model drawing and installation scope attached to the order	☐ Yes ☐ No ☐ To confirm	