







How to Move-Out a Resident






Description

Use this function when a resident leaves your Community. The Move-Out function applies to an individual resident; if the second occupant is leaving as well, both residents must be Moved-Out. This function also applies when a resident completes a short-term stay and is returning as a permanent resident.








The system will update the following for a single resident:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Lease** (Final completion of the lease occurs on final billing)
-  Change the **Suite Status** on the Suite tab to *Available*
-  Remove the **Lease** from the Suite tab

The system will update the following for a second occupant only:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Sharing Amount** on the Lease tab (Final completion of the lease occurs on final billing)
-  Keep the **Suite Status** on the Suite tab as *Occupied*

The system will update the following if only the primary resident moves out:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Lease** (Final completion of the lease occurs on final billing)
-  Create a new **Lease** for the second occupant
-  Change the **Resident Type** on the second occupant's Resident profile to *Resident*
-  Keep the **Suite Status** on the Suite tab as *Occupied*

Step by Step

- 1 Go to the Resident's profile and click **Move-Out**



Resident
R-10353

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Resident Detail
Transfer
Absence
Notice
Move-Out

- 2 Select the **Reason Code** and **Destination**
- 3 Specify a **Competitor** if applicable
- 4 Enter **Move-Out Comment** if more detail is required
- 5 Specify **Effective Date** as the revenue end date
- 6 Review your information and check **Please Check to Confirm Move-Out**
- 7 Click **Save**

Save Quick Save Cancel

▼ Resident Information

First Name	John	Last Name	Waffles
Community	iaRetirement - GTA	Suite	

▼ Move-Out

Specify Reason Code: Medical

Specify the Destination: Moving to a competitor Assisted Living facility

Specify if moving to a competitor: Mr.Sleazy Seniors Paradi

Move-Out Comment:

This field should be used if more detail is required

Effective Date: 3/31/2013 [3/8/2013]

Please Check to Confirm Move-Out:

Save Quick Save Cancel

- 8 Repeat for additional occupant if required.