

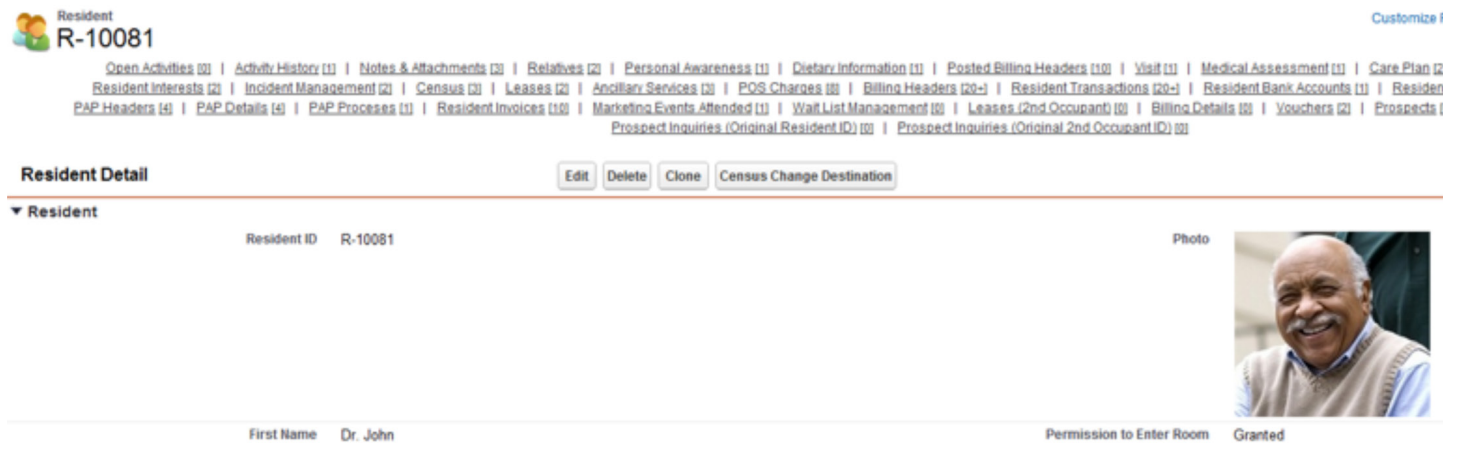
Moving Residents & Census Management

Maintaining Suite Inventory, Deposits, Leases, Transfers, Notices, Temp to Perm Conversions & Discharges

Census Management is key to the operation of a retirement home. Accurate suite inventory, length of average stay, and upcoming suite availability are all relevant facts. To simplify the maintenance of this information, all resident movement is handled in one location – on the *Resident Page*.

Resident Page

All resident transactions are completed by clicking the Resident's "Census Change Destination" button.



Resident
R-10081

Open Activities (0) | Activity History (1) | Notes & Attachments (3) | Relatives (2) | Personal Awareness (1) | Dietary Information (1) | Posted Billing Headers (10) | Visit (1) | Medical Assessment (1) | Care Plan (2) | Resident Interests (2) | Incident Management (2) | Census (3) | Leases (2) | Ancillary Services (3) | POS Charges (33) | Billing Headers (20-) | Resident Transactions (20-) | Resident Bank Accounts (1) | Resident P&P Headers (4) | P&P Details (4) | P&P Processes (1) | Resident Invoices (10) | Marketing Events Attended (1) | Wait List Management (6) | Leases (2nd Occupant) (6) | Billing Details (6) | Vouchers (2) | Prospects (1) | Prospect Inquiries (Original Resident ID) (2) | Prospect Inquiries (Original 2nd Occupant ID) (3)

Resident Detail

Edit Delete Clone Census Change Destination

▼ Resident

Resident ID R-10081

Photo

First Name Dr. John

Permission to Enter Room Granted

Transaction Types

The different types of resident movement are indicated below:

- Transfer Indicates a resident is moving from one suite to another
- Absence Records a hospital stay or extended vacation
- Notice Notice Absent or Notice Present
- Discharge Indicates a resident is moving out
- Conversion Indicates a trial stay resident is becoming a permanent resident

NB: This section covers the resident portion of the conversion process. The move-in must be completed in the Move-In section.)

Continued on next page...

Inquiries Marketing Events Reports My Community **Residents** Meal Tickets + ▾

Prospect Inquiries Tab Save QuickSave Cancel

▼ Resident Information


First Name	Dr. John	Last Name	Adams
Community	iaRetirement - GTA	Suite	705

▼ Select Transfer / Absence / Notice or Move-Out (Discharge)


Select Transaction Type:

Specify the Transaction Type or Reason Code:

For a Notice or Move-Out Specify the destination:

Specify if moving to a competitor: 

Move-Out Comment:

For a Transfer Please Specify the New Suite: 

Effective Date:

Please Check to Confirm Discharge Only:

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Transactions - Data Requirements

Each transaction type requires a *reason code* and *pertinent data*, as indicated in the summary below:

Transaction Type	Reason Code	Required Data
Transfer	New suite	Effective date New suite number
Absence	Vacation / Hospital / Present	Effective date
Notice	Notice Absent / Notice Present	Effective date
Discharge	Input reason e.g. Destination / Competitor / Comment	Effective date
Conversion	Immediate / Returning	Effective date New prospect status New suite number (optional)

Transactions - Effects on the System

Each transaction type leads to a series of changes in the system:

Transaction	Resident	Suite	Lease	Census
Transfer	Suite number changes	Original suite becomes <i>Available</i> , new suite becomes <i>Occupied</i>	A new lease record is created. If the rent is different, the start and anniversary date are updated.	A new record indicating the new suite is created.
Absence	Resident status changes to vacation / Hospital / Present	No change	No change	No change
Notice	Resident status changes to Notice - Absent / Notice - Present			
Discharge				
Conversion				

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