iaRetirement Home Software

New Prospect Screen

Training Manual - Summer 2012

Overview:

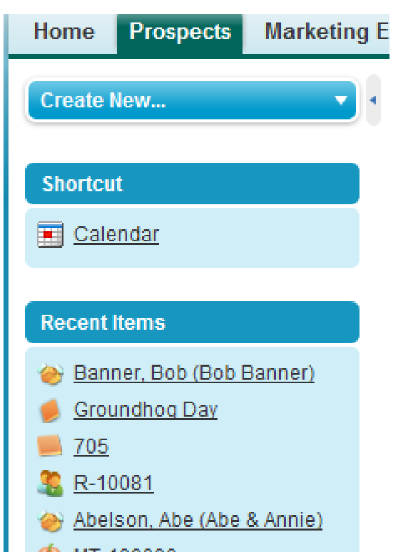
As of Version 4 the prospects inquiries have been moved to a new file called Prospects.
All related information, tasks & events have been transferred as well.
The Prospect Name is now a combination of the Inquirer's Last Name & First Name, followed by the following in brackets.

If there are two prospects, the system will show both first names.
Abelson, Abe (Abe & Annie)

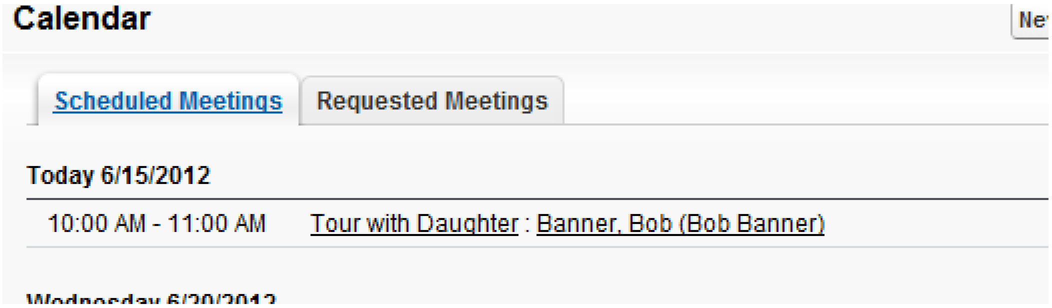
If there is only one prospect, the system will show the prospect's First & Last Names.

Banner, Bob (Bob Banner)

In all cases the inquirer's name will be presented as Last Name, First name to simplify sorting.
This information will display wherever the PI# used to show. In particular on the recent items in your sidebar,

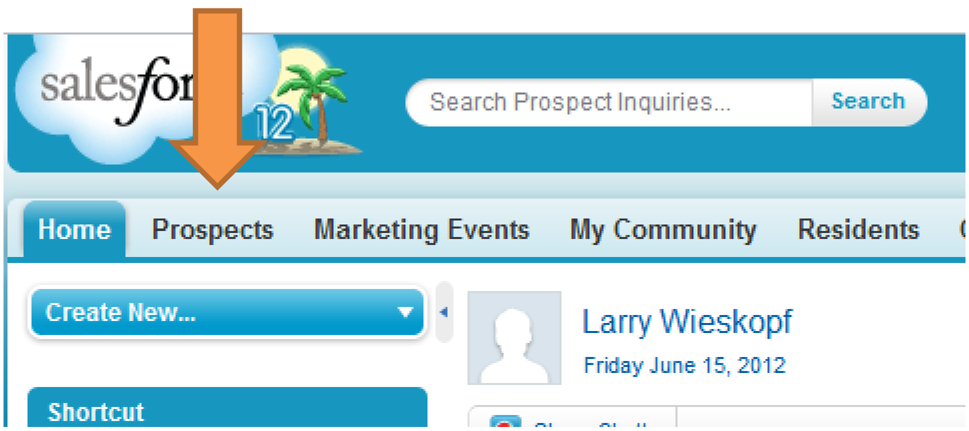


and on your home page listing for Tasks & Events:

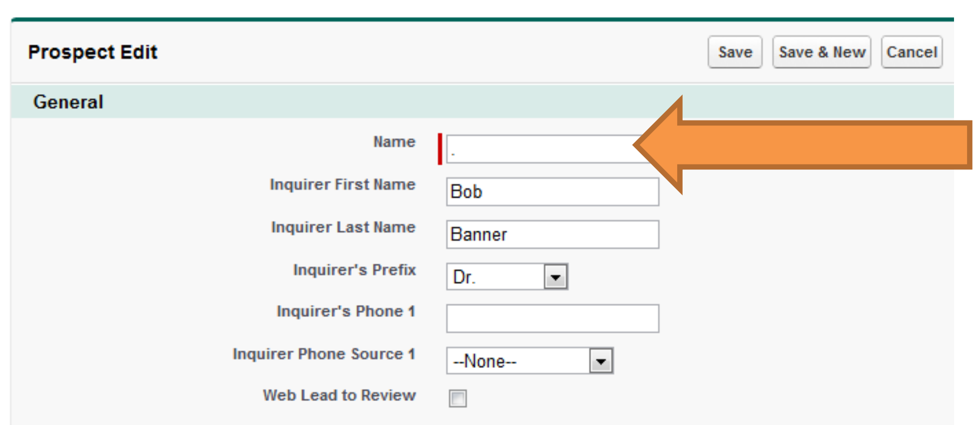


A couple of notes:

1. The prospect inquiry menu should not be visible on your system, please let us know if it is and use Prospects.



2. <u>When creating a new Prospect you don't need to fill in a name in the Name field. Simply putting a period "." Will activate the auto update for this field. Unfortunately, if you leave it blank the system will tell you it' can't be blank.</u> We are working on this, but the general consensus was t this small inconvenience is a small price to pay for visibility of the names.



3. The prospect screen is essentially the same but has two new sections:

a. **<u>Previous Stay -</u>** This section will be populated with the new Temp to Perm Conversion information for returning residents. (See Temp to Perm Conversion Handout)

▼ Previous Stay

Trial Stay Type	Respite		
Original Resident ID	R-13089	Original 2nd Occupant ID	R-13090
Original Resident Name	John Adams	Original 2nd Occupant Name	Elaine Adams

b. **<u>Deposit & Planning –</u>** This section displays deposit information that you entered when creating a Move-In Planner. The fields here are Read Only, any deposit or Move-In Planner information is still entered by clicking the Create Move-In Planner Button.

▼ Deposit and Planning

Deposit Date	5/12/2011	Preferred Suite	798
Amount	$500.00	Anticipated Move-in Date	5/30/2011
Document No.	5	Assessment Status	Requested
Payment Type	Cheque	Assessment Date	

▼ Other Information

c. **<u>Close File Information –</u>** This section displays information about a lost prospect

▼ Close File Information

Reason Code	Frail Health	Date Closed	8/8/2011
Destination	Moving to long term care	Competitor	Mr.Sleazy Seniors Paradise

▼ Other Information

d. **<u>Other information –</u>** This section contains additional information which as above is read only. One temporary field here, Original PIID, will display and allow access to the original Prospect Inquiry for Verification. This will be removed within a few weeks.

▼ Other Information

Original PI	PI-0178		
CommunityFilter	iaRetirement - GTA		
Original PIID	PI-0178		
GoogleMe	Google		
Prospect's Birthday Month	April		
Owner	Larry Wieskopf [Change]		
Created By	Larry Wieskopf, 5/28/2012 3:38 PM	Last Modified By	Larry Wiesl

Edit | Delete | Clone | Create Move-In Planner | Close Prospect File

(See the handout for Creating a Move In Planner and Moving Residents for more information on these)

4. Tour Plan is now Tour Planner.

NOTE: The screen shots represent the standard iaRetirement Home Software screens, your actual screens may be slightly different