**Training Manual - Summer 2012** 

## **Waitlist Management**Waitlists for Prospects & Residents

Waitlist Management allows for the recording of deposits and room requests in situations with insufficient prospect data or an existing resident's room transfer request.

To process a deposit or hold a room, *iaRetirement Home Software* typically requires the following information:

- Deposit
- Move-In Date
- Available Suite

When the data listed above is incomplete, Waitlist Management is used to process prospect requests, deposits and room requests. Similarly, Waitlist Management is used to process an existing resident's request to transfer rooms.

## **Waitlist Management Page**



| Wait List Management Detail | Edit Delete Clone                                    |
|-----------------------------|--|
| Wait List ID                | Looking for AL with Balcony                          |
| Prospect                    | Adams, Brad (John & Elaine)                          |
| Resident                    |  |
| Name                        | John Adams   |
| Preferred Suite             |  |
| Preferred Suite Type        | 1 Bedroom  |
| Preferred Move-in Date      | 1/16/2012  |
| Requests                    | High Floor on Sunny Side of Building                 |
| Priority                    | Regular  |
| Deposit                     |  |
| Comments                    |  |
| Hold Room Until             | 6/30/2012  |
| Status                      | Waiting  |
| Status Date                 | 5/17/2012  |
| Created By                  | Larry Wieskopf, 1/16/2012 3:34 PM  Edit Delete Clone |