iaRetirement Home Software

How to Co-ordinate a Move-In Using the Move-In Planner

Description

The Move-In Planner is a powerful tool that can help co-ordinate the various stages of a Resident's move-in process. It is also helpful in capturing information that is not typically picked up in the sales cycle, such as social insurance and health card numbers.

Step by Step

Updating the Move-In Planner Page

1. Navigate to a Prospect's Move-In Planner page
2. Click **Edit.** Here you can enter information you have that was not entered during the creation of the Move-In Planner.
3. You may specify an **Assessment Date** and **Assessment Status**
4. If there is a **Move-In Incentive**, you may enter the incentive here, along with the **Start Date** and **End Date** for the incentive
5. Verify the Resident's information, which was picked up in the creation of the Move-In Planner, and make changes if necessary. This information will transfer to the Resident's profile page when the resident is created.
6. Enter the Primary Resident's personal information, such as **Resident Gender, Date of Birth,** and **Resident Health Card.** This information will transfer to the Resident's profile page when the resident is created.
7. If there is a Sharing Resident (or Second Occupant), verify their information and input any additional information you may have. This information will transfer to the Resident's profile page when the resident is created.
8. You may enter information about a **Primary Contact** for the Resident
9. Verify the **Community ID** and **Suite.** This information will transfer to the Resident's profile page when the resident is created.
10. Verify the **Expected Admission Date** and **Move-In Date**
11. You may specify a **Furniture Date** and related contact information
12. You may specify **Telephone** and **Cable** hookup dates
13. Verify the information under Accommodation and Personal Services. This information will transfer to the Resident's profile page when the resident is created.
14. Click **Save**

Updated: October 30, 2013

▼ General

Audit No.	010366	Assessment Date	10/4/2013
Inquirers Name	Jacob Smythe	Assessment Status	Pending
Stay Type	Permanent		
Original Prospect	Smythe, Jacob (Jacob Smythe)	Refund Date	
Anticipated End of Stay		Refund Status	
Current Suite Status	Occupied	Move In Incentive	
		Move In Incentive End Date	
		Move In Incentive Start Date	

▼ Resident Information

Resident Prefix		Resident Phone 1	(555) 555-5555
Resident First Name	Jacob	Resident Phone Source 1	Home Phone
Resident Last Name	Smythe	Resident Phone 2	
Resident Prefers To Be Addressed As	Jake	Resident Phone Source 2	
Resident Email			

▼ Resident Personal Information

Resident Gender	Male	Resident Pet	
Resident Smoker	☐	Resident Marital Status	Single
Resident Date of Birth	11/5/1930	Resident Health Card	66666-666-666 NN
Assisted Living	☐	Resident SSN	999 999 999
Resident Veteran	☐		

▼ Primary Contact Information

Contact First Name	Elle	Contact Phone 1	(555) 555-5556
Contact Last Name	Smythe	Contact Phone Source 1	Home Phone
Contact Prefers To Be Addressed As		Contact Phone 2	
Relationship To Resident	Daughter	Contact Phone Source 2	
Contact Email	elle.smythe@gmail.com		

▼ Community

Community ID	iaRetirement - GTA
Suite	888

▼ Planning

Expected Admission Date	10/1/2013	Furniture Date	10/1/2013
Resident Arrives		Furniture Contact	
Move-In Date	10/1/2013	Telephone Date	10/4/2013
Cable Date	10/5/2013	Telephone Contact	
Cable Contact			

▼ Accommodation & Personal Services

Rent Type	Permanent	Program	
Rent	$2,200.00	Services Type	Service
Month/Day	Month	Services	$2,200.00
Second Occupant Type		Lease Type	
Sharing Amount	$0.00	Payment Method	

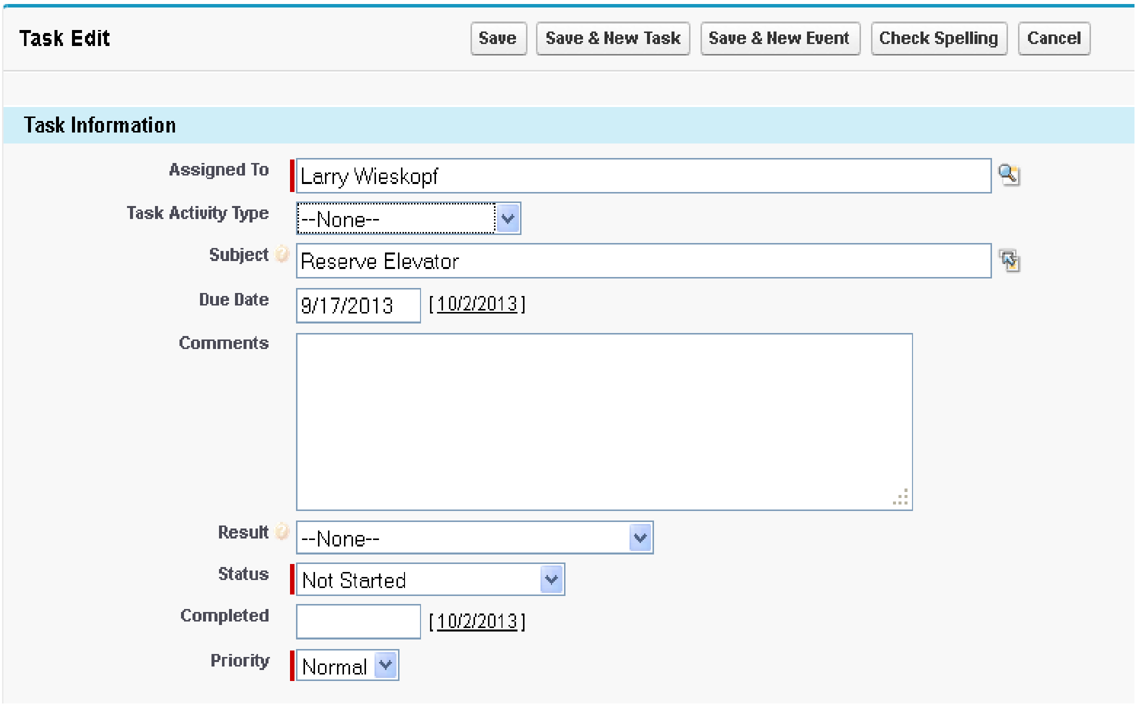
Managing Tasks

1. Hover over ‘Open Activities’ in the baby words and click **New Task**
2. Under **Assigned To**, specify the person to whom a task is assigned
3. Select an **Activity Type**
4. Enter a **Subject**
5. Specify a **Due Date** if the task is to be completed on a future date, such as planning a future call
6. If you have not yet started the task, leave the **Results** field as *None*
7. If you have not yet started the task, leave the **Status** as *Not Started*

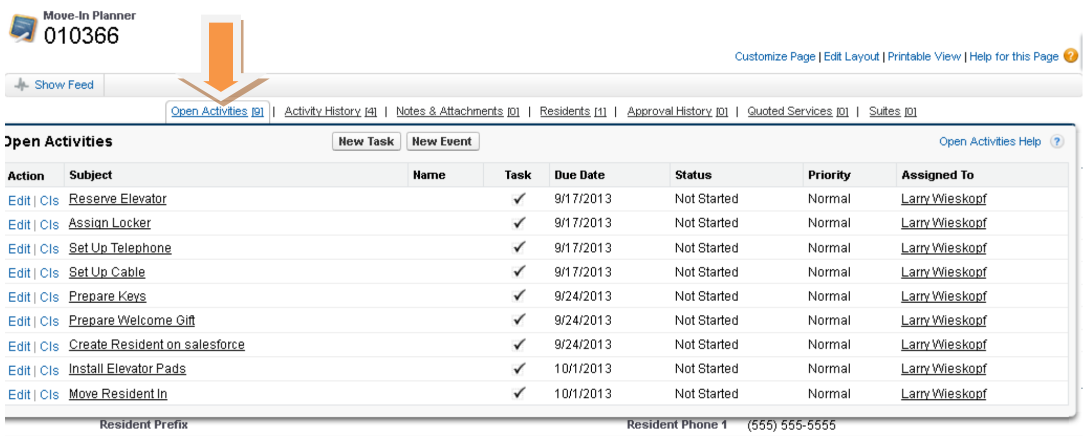
8 Leave the **Completed Date** blank if the task has not yet been completed
Note: The Results, Status, and Completed Date fields will be changed when the task is marked as completed.

9 Click the box to set a **Reminder** if you would like this task to pop up on your screen for the time set before the task

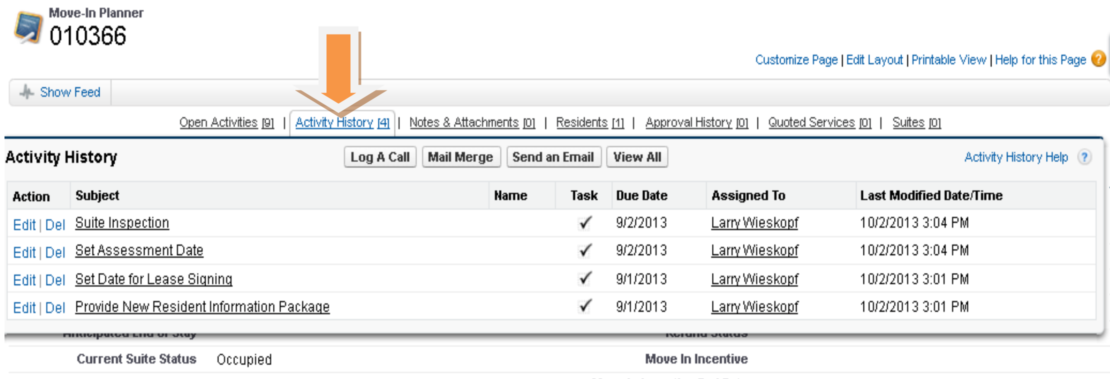
10 Click **Save**



11 To see a list of the outstanding tasks associated with this Move-In Planner, hover over 'Open Activities' in the baby words at the top of the screen



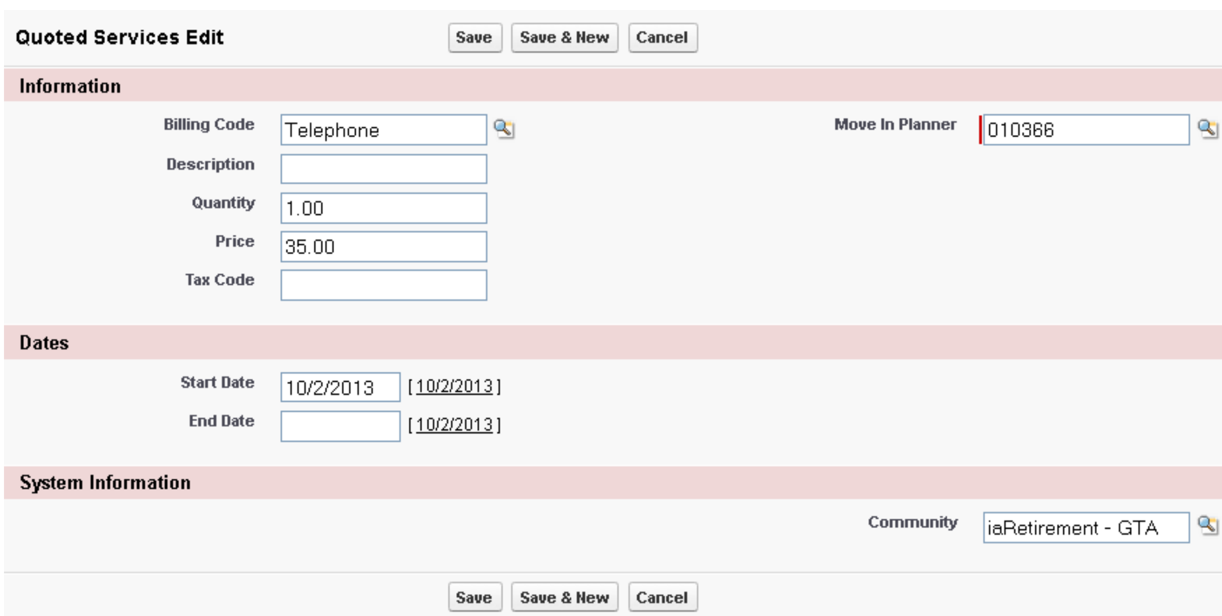
12 To see a list of the completed tasks associated with this Move-In Planner, hover over 'Activity History' in the baby words at the top of the screen



Entering Recurring Charges on the Move-In Planner

Recurrung charges are used for additional billing services, such as programs, laundry pendants, and television. They are also used to record marketing incentives. Defaults can be set up in the pricing table (see *How to Default Recurring Charges).*

1. Hover over ‘Quoted Services’ in the baby words and click **New Quoted Services**
2. Specify the **Billing Code**
3. Change the **Quantity** to *1.00*
4. Enter a **Price**
5. Specify a **Start Date**
6. Specify a **Community**
7. Click **Save**



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