






# How to Convert a Temporary Resident to Permanent

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## Description

This guide will show you how to properly record Temporary to Permanent conversions in the system. Separate Resident records and Census records will parallel the new lease and stay type.

To process a conversion you will need to:

-  Put the Temporary Resident on Notice
-  Create a new Move-In Planner
-  Move out the Temporary Resident
-  Create a new Permanent Resident
-  Move in the new Resident

This procedure also applies to a Respite Resident returning for another Respite stay.

CHATTER TIP! → [Use Chatter Feeds to notify all appropriate team members of a new Permanent Resident.](#)

## Step by Step

### *Create a New Move-In Planner*

As soon as a Temporary Resident gives notice of their decision to convert to Permanent, a new Move-In Planner should be created.

- 1** Navigate to the Resident's original Prospect record and click **Create Move-In Planner**
- 2** Verify the Prospect information
- 3** Select *Permanent* as the **Stay Type**
- 4** Specify the **Program**, if applicable
- 5** Specify a **Suite**. Use the magnifying glass to verify that the preferred suite is available.
- 6** Specify a **Move-In Date** for the Permanent move-in
- 7** Enter a **Deposit Amount** based on your company's policy. If your company does not require a deposit, put 0 as the amount.
- 8** Select a **Payment Type**. If no deposit has been given, choose *No Deposit*.


- 9** Specify a **Deposit Date**. If no deposit has been given, choose today's date.
- 10** Verify the data and select **Yes** under **Create Move-In Planner**
- 11** Click **Save**

▼ Move-In & Deposit Details	
Status	Initial Call
New Prospect Status	Urgent Need ASAP
Stay Type	Permanent
Program	Lifestyle Program
Community	iaRetirement - Oshawa
Preferred Suite	205
Anticipated Move-In Date	8/15/2011
Deposit Amount	500.00
Document No.	222
Payment Type	Cheque
Deposit Date	10/29/2013
Create Move-In Planner	Yes
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

### *Put Temporary Resident on Notice*

- 1** In the Resident's profile, click **Notice**
- 2** Select *Notice – Present* as the **Notice Type**
- 3** Select *End of Respite* as the **Reason Code**
- 4** Select *Staying at Current Facility* as the **Destination**
- 5** Specify today's date as the **Effective Date**
- 6** Verify the data and check **Confirm Notice**
- 7** Click **Save**

▼ Notice - Please Enter Notice on 2nd Occupant if Appropriate

Notice Type	<input type="text" value="Notice - Present"/>
Specify the Reason code	<input type="text" value="End of Respite"/>
Specify the Destination	<input type="text" value="Staying at current facility"/>
Specify if Moving to a Competitor	<input type="text"/> 
Effective Date	<input type="text" value="3/13/2013"/> [ 8/12/2013 ]
Confirm Notice	<input checked="" type="checkbox"/>

### ***Move Out the Temporary Resident***


- 1** In the Resident's profile, click **Move-Out**
- 2** Select *End of Respite* as the **Reason Code**
- 3** Select *Staying at Current Facility* as the **Destination**
- 4** Specify **Effective Date** as the date of the conversion
- 5** Review your information and check **Please Check to Confirm Move-Out**
- 6** Click **Save**

▼ Move-Out	
Specify Reason Code	End of Respite
Specify the Destination	Staying at current facility
Specify if Moving to a Competitor	<input type="text"/>
Move-Out Comment	<input type="text"/>
Effective Date	3/13/2013 [ 8/12/2013 ]
Specify Date to Suspended Rent. If left blank effective date is used	4/12/2013 [ 8/12/2013 ]
Specify Date to Suspended Service. If left blank effective date is used	4/12/2013 [ 8/12/2013 ]
Specify Date to Suspended 2nd Occupant Suspend. If left blank effective date is used	4/12/2013 [ 8/12/2013 ]
Recurring Charge End Date. If left blank effective date is used	<input type="text"/> [ 8/12/2013 ]
Please Check to Confirm Move-Out	<input checked="" type="checkbox"/>

Save QuickSave Cancel

### *Create the Permanent Resident*

- 1 On the Move-In Planner page, click **Create Resident**
- 2 Verify the Resident information and check off **Create Resident(s)**. Note that the move-in date should not be the same as the move-out date for the Temporary Resident. This date is determined by your company's policy.
- 3 Click **Save**

▼ Rent Amounts & Billing Codes	
Stay Type	Permanent
Month/Day	Month <input type="button" value="v"/>
Rent Billing Code	<input type="text" value="Permanent"/> <input type="button" value="🔍"/>
Rent \$	<input type="text" value="2,200.00"/>
Service Billing Code	<input type="text"/> <input type="button" value="🔍"/>
Services \$	<input type="text" value="2,200.00"/>
2nd Occupant Billing Code	<input type="text"/> <input type="button" value="🔍"/>
2nd Occupant \$	<input type="text"/>
▼ Move-in Verification & GO	
Community	iaRetirement - Niagara <input type="button" value="✕"/> <input type="button" value="🔍"/>
Suite	<input type="text" value="202"/> <input type="button" value="🔍"/>
Move In Date	<input type="text" value="7/22/2013"/> [8/12/2013]
Create Resident(s)	<input checked="" type="checkbox"/> 
<input type="button" value="Save"/> <input type="button" value="QuickSave"/> <input type="button" value="Cancel"/>	

### *Move In the Permanent Resident*

- 1 On the Move-In Planner page, click **Move In Resident(s)**
- 2 Verify Resident information and check **Move-in Resident(s)**. Again, note that the move-in date should not be the same as the move-out date for the Temporary Resident. This date is determined by your company's policy.
- 3 Click **Save**

▼ Resident Information	
Resident First Name	
Resident Last Name	Peterson
Assisted Living	<input type="checkbox"/>
▼ 2nd Occupant Information	
Sharing First Name	<input type="text" value="Elaine"/>
Sharing Last Name	<input type="text" value="Peterson"/>
Assisted Living	<input type="checkbox"/>
▼ Move-In Verification & GO	
Stay Type	Permanent
Community	<a href="#">iaRetirement - Niagara</a>
Suite	<u>202</u>
Move-In Date	<input type="text" value="7/22/2013"/> [ <a href="#">8/12/2013</a> ]
Move-In Resident(s)	<input checked="" type="checkbox"/>