How to Create a Resident and Lease

Description

Use this function on the Move-In Planner to create the resident profile and lease. Typically, this function is done a week before move-in, in preparation for the lease signing.

The system will:

- Create a Resident Profile for each Resident with a **Status** of *Pending*
- Create a Lease (The lease is not active until Move-In)
- Copy Quoted Services to Resident Recurring Charges
- Create any recurring charges set for default
- Copy Relatives entered on the Prospect Profile to Resident Relatives
- Change the **Status** on the Suite to *Leased* (If the suite is currently *On-Hold* or *Available*)
- Insert a history activity line on the **Prospect** record (optional)

CHATTER TIP! → Use Chatter Feeds to notify all appropriate team members of a new resident moving in shortly.

Step by Step

1 Navigate to the Prospect's Move-In Planner and click **Create Resident**
2 Confirm the resident details. **Create Primary As** should be *Primary* and **Create Sharing As** should be *Secondary.* These fields automatically default; **Create Sharing As** only defaults if a **Sharing First Name** is entered on the Move-In Planner.

NOTE: Even if one resident is not yet ready to move in, both Primary and Secondary residents must be created at this point (the system does not allow you to create them individually from the Move-In Planner). Create both residents and record a postponed move-in for the absent resident. See *How to Record a Resident Absence* document.

The following fields default based on the information provided on the Move-In Planner, Billing Codes, Suites, and My Community. If they are not defaulting or if the default values are incorrect, please advise your administrator.

3 Confirm **Stay Type.** If incorrect, change the **Rent Billing Code** and this field will update when saved (Defaults from **Prospect | Stay Type**).

4 Confirm or select **Month/Day** to select the billing frequency (Defaults from **Billing Code | Billing Unit**)

5 Confirm or specify the **Rent Billing Code** (Defaults from **Billing Code | Stay Type**)

6 Confirm **Rent $**. This amount should not be changed; if a discount is given, a Marketing Incentive should be entered in Quoted Services (Defaults from **Suite | Rent**)

7 Specify **Service Billing Code** or <u>specify to match service plan included in rent</u>. Additional services should be added in Quoted Services (Defaults from **My Community | Default Service Code**)

8 Confirm or enter **Services $** (Defaults from **Billing Code | Amount**)

9 Specify **2nd Occupant Billing Code** (Defaults from **My Community | Default Sharing Billing Code** if applicable)

10 Enter **2nd Occupant $** (Defaults from **My Community | Sharing $**)

11 Specify the new **Suite** and click the magnifying glass to validate the information

12 Specify the **Move-In Date**

13 Review your information and check **Create Resident(s)**

14 Click **Save**