







How to Move Out a Resident






Description

Use this function when a Resident leaves your Community. The Move-Out function applies to an individual Resident; if the Second Occupant is leaving as well, both Residents must be Moved-Out. This function also applies when a Resident completes a short-term stay and is returning as a Permanent Resident.








The system will update the following for a single Resident:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Lease** (Final completion of the lease occurs on final billing)
-  Change the **Suite Status** on the Suite tab to *Available*
-  Remove the **Lease** from the Suite tab

The system will update the following for a Second Occupant only:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Sharing Amount** on the Lease tab (Final completion of the lease occurs on final billing)
-  Keep the **Suite Status** on the Suite tab as *Occupied*

The system will update the following if only the Primary Resident moves out:

-  Change the **Status** on the Resident profile to *Move-Out*
-  Clear the **Suite** on the Resident profile
-  Create a new **Census** record
-  Suspend the **Lease** (Final completion of the lease occurs on final billing)
-  Create a new **Lease** for the Second Occupant
-  Change the **Resident Type** on the Second Occupant's Resident profile to *Resident*
-  Keep the **Suite Status** on the Suite tab as *Occupied*

Step by Step

- 1 Navigate to the Resident's profile
- 2 Click the **Move-Out** button. Depending on your company's set-up, you will be taken to one of two screens.

Screen #1 (See screen shot below for example)

- 1 Select the **Reason Code**
- 2 Select the **Destination**
- 3 Specify a **Competitor**, if applicable
- 4 Enter **Move-Out Comment** if more detail is required
- 5 Specify **Effective Date**
- 6 If a Second Occupant is moving out at the same time, check off **Move-Out Both Residents**
- 7 Review the data and check off **Please Check to Confirm Move-Out**
- 8 Click **Save**

Resident Information			
Resident Type	Resident	First Name	Lindsay
Last Name	Anderson	Community	iaRetirement - Palm Springs
Suite	107		

Move-Out	
Specify Reason Code	Financial
Specify the Destination	Moving back to own residence
Specify if Moving to a Competitor	<input type="text"/>
Move-Out Comment	<div style="border: 1px solid #ccc; height: 40px;"></div>
Effective Date / Revenue End Date	1/13/2014 [1/13/2014]
Move-Out Both Residents	<input type="checkbox"/>
Please Check to Confirm Move-Out	<input checked="" type="checkbox"/>

Screen #2 (See screen shot below for example)

Note: If your company has the screen below and two Sharing Residents are moving out at the same time, move out the Second Occupant *first*.

- 1** Select the **Reason Code**
- 2** Select the **Destination**
- 3** Specify a **Competitor**, if applicable
- 4** Enter **Move-Out Comment** if more detail is required
- 5** Specify **Effective Date**
- 6** Specify **Date to Suspend Rent**. If left blank, effective date is used.
- 7** Specify **Date to Suspend Service**. If left blank, effective date is used.
- 8** Specify **Date to Suspend 2nd Occupant**. If left blank, effective date is used.
- 9** Specify a **Recurring Charge End Date**. If left blank, effective date is used.
- 10** Review your information and check off **Please Check to Confirm Move-Out**
- 11** Click **Save**
- 12** Repeat for Primary Occupant, if applicable

Resident Information	
Resident Type	Resident
Last Name	Blaymin
Suite	888
Move-Out	
Specify Reason Code	Financial
Specify the Destination	Moving back to own residence
Specify if Moving to a Competitor	<input type="checkbox"/>
Move-Out Comment	<input type="text"/>
Effective Date	10/4/2013 [10/4/2013]
Specify Date to Suspended Rent. If left blank effective date is used	<input type="text"/> [10/4/2013]
Specify Date to Suspended Service. If left blank effective date is used	<input type="text"/> [10/4/2013]
Specify Date to Suspended 2nd Occupant Suspend. If left blank effective date is used	<input type="text"/> [10/4/2013]
Recurring Charge End Date. If left blank effective date is used	<input type="text"/> [10/4/2013]
Please Check to Confirm Move-Out	<input checked="" type="checkbox"/>