






# 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.
- 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	Resident
Stay Type	Permanent
Program	Lifestyle Program
Community	iaRetirement - GTA
Preferred Suite	804
Anticipated Move-In Date	5/1/2014 [ 5/1/2014 ]
Deposit Amount	
Document No.	
Payment Type	No Deposit
Deposit Date	[ 5/1/2014 ]
Create Move-In Planner	Yes

Save 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 *Returning as Permanent* as the **Destination**
- 5** Specify the day before the conversion 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	Notice - Present ▼
Specify the Reason code	End of Respite ▼
Specify the Destination	Returning as Permanent ▼
Specify if Moving to a Competitor	<input type="text"/> 
Effective Date / Date Notice is Given	4/30/2014 [ 5/1/2014 ]
Specify any additional information	<input type="text"/>
Confirm Notice	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	







### *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 *Returning as Permanent* as the **Destination**
- 4** Specify **Effective Date** as the day before 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	Returning as Permanent ▼
Specify if Moving to a Competitor	<input type="text"/> 
Move-Out Comment	<input type="text"/>
Effective Date / Revenue End Date	4/30/2014 [ 5/1/2014 ]
Move-Out Both Residents	<input type="checkbox"/>
Please Check to Confirm Move-Out	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="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 ▼
Rent Billing Code	Permanent 
Rent \$	2,000.00
Service Billing Code	Service 
Services \$	1,000.00
2nd Occupant Billing Code	
2nd Occupant \$	0.00
▼ Move-in Verification & GO	
Community	laRetirement – Test  
Suite	152 
Move In Date	5/1/2014 [ 5/1/2014 ]
Create Resident(s)	<input checked="" type="checkbox"/>
<input type="button" value="Save"/> <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.

 Click **Save**

▼ Resident Information	
Resident First Name	Michelle
Resident Last Name	Adams
Assisted Living	<input type="checkbox"/>

▼ 2nd Occupant Information	
Sharing First Name	<input type="text"/>
Sharing Last Name	<input type="text"/>
Assisted Living	<input type="checkbox"/>

▼ Move-In Verification & GO	
Stay Type	Permanent
Community	<u>laRetirement – Test</u>
Suite	<u>152</u>
Move-In Date	<input type="text" value="5/1/2014"/> [ 5/1/2014 ]
Move-In Resident(s)	<input checked="" type="checkbox"/>