**SOP** **Number** Voy.05

**SOP** **Title** Update Move In and Lease from date change

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|  | **NAME** | **TITLE** | **SIGNATURE** | **DATE** |
| **Author** | Issac Samaya | Support Specialist L2 |  |  |
| **Reviewer** | Abhishek Kalantri | Vice President |  |  |
| **Authorizer** | Shanette Silva | Director of software support |  |  |

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| **Effective** **Date:** |  |
| **Review** **Date:** |  |

# PURPOSE

Regulations and procedures for Updation in MoveIn date and Lease From date with the guidelines

# SCOPE

Some time due to tenant request we need to update Move In and lease from dates

# DEFINITIONS

Updating Move-In and Lease from date

# RESPONSIBILITIES

AGA team will assess the request and accordingly update the movein date or lease from date

# SPECIFIC PROCEDURE

Yardi:

1. Request should come from CM, RM or RVM
2. When there is a ticket for movein date change then we need to change the lease from date also same as movein date or vice versa.
3. Before we change the move in and lease from date from the utility, we need to check the lease charges and the ledger.
   1. If the ledger is already posted, then we should not change the lease charges amount (not allowed)/from date.
   2. If the move in date to be changed is greater than the current movein date, then the lease charges update will have an error while updating end date for the charges.
   3. Thus, it is mandatory to end the lease charges till the month through which ledger is posted and then add a new lease charge record from next month of charges posted month.
4. When the move in date to be changed is less than the current movein date then there is no error while updating end date for the charges & user can edit this by themselves.
5. Example- Movein date to be changed from 06/24/2022 to 06/27/2022

Timeline

Description automatically generated

Screenshot of the lease charges after putting an end date.

Graphical user interface

Description automatically generated

Screenshot of lease charges after adding new rows for future charges.

Graphical user interface

Description automatically generated

These charges are already linked to ledger balances posted. So, we are not changing the from date [from backend] on these lease charges as the history will be lost. As highlighted below the lease charges are billed for 7 days to ledger. We are informing the users to do the manual adjustments to the ledger.

Table

Description automatically generated

1. Use the toolbox>History Tables Toolbox- To change the movein and lease from date.

Graphical user interface

Description automatically generated

Table

Description automatically generated

1. Movein date and lease from date on Tenant screen is changed-

Graphical user interface

Description automatically generated

1. Resident history which shows the movein date and lease from dates are changed.

Graphical user interface, table

Description automatically generated

Table

Description automatically generated

1. Movein date and lease from date are changed at unit level & unit history level.

Graphical user interface, table

Description automatically generated

Table

Description automatically generated  
 This ticket can be solved from front end.

# FORMS/TEMPLATES TO BE USED

Where Forms/Templates are referenced in the text, the numbers and titles are listed under this section.

# INTERNAL AND EXTERNAL REFERENCES

This section is used to list all controlled internal references (e.g. SOPs) and external references referred to within the text of the SOP only.

* 1. **Internal** **References**

Insert relevant references as required, sufficient for the user to find the source document.

* 1. **External** **References**

Insert relevant references as required, sufficient for the user to find the source document. Web references should be included were possible.

# CHANGE HISTORY

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| **SOP** **no.** | **Effective** **Date** | **Significant** **Changes** | **Previous** **SOP** **no.** |
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**SOP** **Number** **Insert** **Number** **SOP** **Title** **Document** **Control**

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| **Author** |  |  |  |  |
| **Reviewer** |  |  |  |  |
| **Authoriser** |  |  |  |  |

**Effective** **Date:**

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1. **PURPOSE**
2. **INTRODUCTION**
3. **SCOPE**
4. **RESPONSIBILITIES**
   1. **Chief/Principal** **Investigator**

# SPECIFIC PROCEDURE

* 1. **Version** **control** **and** **naming** **convention**
  2. **Other** **considerations**
  3. **Storage** **and** **archiving**

# FORMS/TEMPLATES TO BE USED

1. **INTERNAL** **AND** **EXTERNAL** **REFERENCES**
   1. **Internal** **References**
   2. **External** **References**
2. **CHANGE** **HISTORY**

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| --- | --- | --- | --- |
| **SOP** **no.** | **Effective** **Date** | **Significant** **Changes** | **Previous** **SOP** **no.** |
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