# Initiating On-site Transfer

The **On-site Transfer** guides the leasing team in managing a resident's move from an occupied unit to a vacant one. It involves confirming the resident’s transfer request, selecting the new unit, setting move-in and move-out dates, and processing any associated charges. The process ensures all details are accurately recorded, including payments and lease terms, to provide a smooth transition for the resident while maintaining clear documentation for the team.

## Step 1: Confirmation

Obtain confirmation from the resident, including the unit and move-in date. This can be done via email or in person, where payment can also be processed to finalize the transfer request.

## Step 2: Initiating the Transfer

Access the resident’s profile, select “More Actions,” and click “Schedule Transfer” to begin the transfer process.

## Step 3: Entering Details

In this step, set the move-in date for the new unit and the move-out date for the old unit. Residents are allowed 3 days to transfer, during which they’ll have access to both units. These three days include the move-in date for the new unit and the move-out date for the old unit.

Next, select the desired lease term based on the resident’s request to transfer and their reason for transferring. Understanding the reason for the transfer helps to better serve the resident and track trends within the community.

Finally, use the “Search for Unit” feature to find and select the desired unit. Apply any necessary filters, and once you find the appropriate unit, select it.

**Important Note:** The recurring charges for the old unit will stop the day before the move-in date, and the charges for the new unit will begin on the scheduled move-in date. Ensure the lease “Start Date” is the same as the move-in date. If there are any changes to the occupants—whether someone is joining or leaving during this process—use the “Edit Occupants” feature to adjust. Additionally, certain transfer scenarios are unavailable, such as transferring all responsible applicants to different units.

**Example:**

If a resident moves into the new unit on March 15th, they will need to move out of the old unit by March 17th. This means their 3 days are March 15th, 16th, and 17th. During this period, they will only pay rent on one unit.

## Step 4: Selecting the Unit

Use the “Search for Unit” option to find and select the desired unit. After selecting, review the unit details and click “Create Transfer.”

## Step 5: Completing Payment

Navigate to the new unit’s ledger and add a holding deposit charge. Process payment if the resident chooses to pay electronically. Once payment is complete, confirm that the deposit is reflected in the ledger.

## Step 6: Finalizing the Transfer

After payment, notify the Assistant Property Manager or Bookkeeper and follow any necessary procedures for providing proof of income or additional incentives related to the transfer.