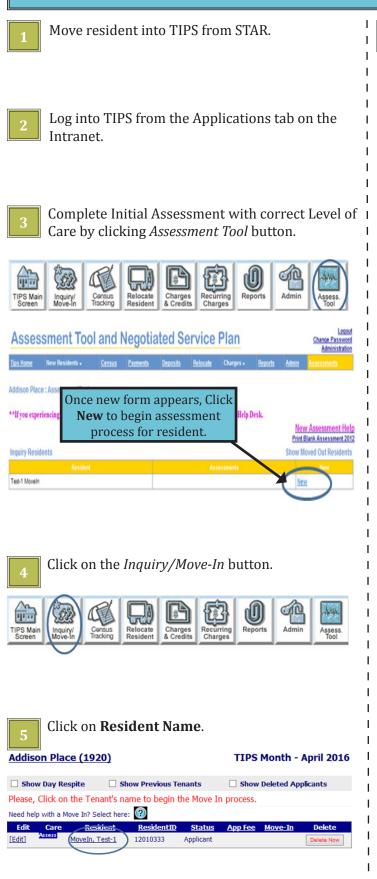
The Ten Step TIPS Move-In Process



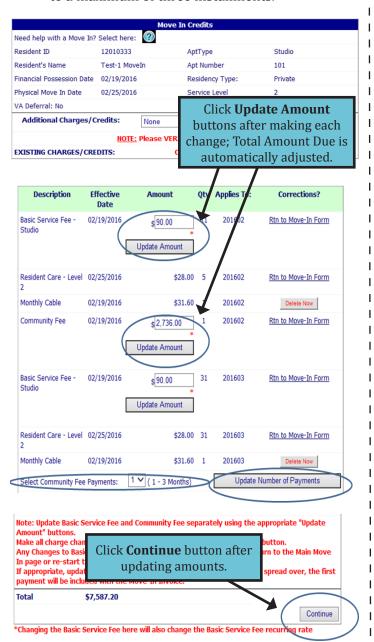
	Move In Form
Need help with a Move In? Select h	ere: 🔞
Residents Name	Test-1 MoveIn
Middle Initial	
SSN	123-45-6789
Birthdate	01/30/1930 (MM/DD/YYYY)
Sex	F
PREVIOUS ADDRESS	
Address Line 1	123
Address Line 2	
City Here	State Indiana - IN
Zip (Postal) Code 12345	
Product line	Assisted Living ✓
	er date resident takes cial possession of room.
Apartment Number	101 - Studio
Financial Possession Date	2 / 19 / 2016 /
Physical Move In Date	2 / 25 / 2016 ~
Projected Move Out Date Enter	date resident physically
Service Level Set	moves in.
Service Points	16
Primary Diagnosis	Other - See NSP
Secondary Diagnosis	None

Complete *Move-In Form* with resident information.

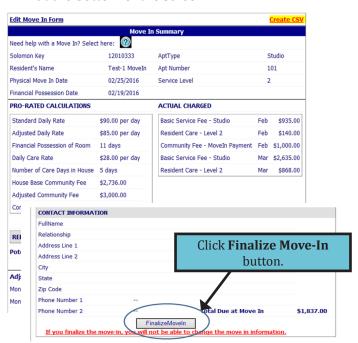


The Ten Step TIPS Move-In Process

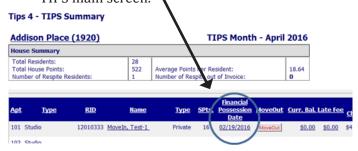
Adjust Basic Service Fee (R&B) and Community
Fee charges to the agreed amount written on the
Residency Agreement. You can also adjust how the I
Community Fee is paid, i.e. the resident can pay up I
to a maximum of three installments.



Verify all information is correct on the Summary page. Once verified, click **Finalize Move-In** button at the bottom of the screen.



Print the Move-In Summary by clicking on the move-in date next to the resident's name on the TIPS main screen.



Once printed, this document is the initial invoice that the resident will receive. It must be given to the resident and signed by all parties. Once signed, the amount due at the bottom of the page must be collected at the time of Financial Possession.

	BALANCE DUE:	\$5,041.20
LEASOR SIGNATURE		DATE
CARE MANAGER SIGNATURE		DATE
EXECUTIVE DIRECTOR SIGNATURE		DATE

TIPS Move-In Invoice Summary FAQs



A

What if I don't know the Physical move in date, or if it changes?

Does the correct care plan discovery and assessment have to be input into TIPS prior to moving the resident in?

Can I print this out prior to moving the resident into TIPS to use during the sales process?

Why should the Move In Invoice Summary be signed?

What do I do with the signed copy of the Move In Invoice?

What if there is no Care Services Manager to sign the Move In invoice?

How many months of CF installments can we offer?

What amount do I collect upon move in?

Use your best judgment as to when they will be moving in based on feedback from the prospect and/or family. If the physical move in date changes, the appropriate care charges will be credited/invoiced by the AR team to the resident/payor on a future bill.

YES! As a part of our sales process, we share the component of cost: basic service fee, care service fee and community fee with prospects as we advance and close the sale. So, it's important that the incoming resident and family understand the care needs that will be administered and the cost of the care before moving into the community. As such, the care place discovery that has been shared and agreed upon as part of the sales process must always be activated in TIPS prior to a resident move in.

NO. The ED should make the Move-In Invoice Summary available to the incoming resident and family during the pre-move in process to confirm charges that have been discussed during the sales process and the payment that must be made at the time of financial move in.

As part of the pre-move in process, this document enables the community to confirm all of the agreed upon charges and what is due at the time of financial move-in. In order to confirm agreement of all charges after the ED has reviewed this initial payment invoice with the resident/family, the invoice is to be signed.

First, make a copy and give it to the resident/family for their records. Then, take the original and scan it with all the other move in paperwork to the H drive. Finally, put the original invoice into the resident's financial file along with the other move in paperwork.

The CSM is required to sign the invoice as confirmation of the Care Level that has been agreed to by all parties. However, if the CSM position is vacant, only the ED needs to sign. Conversely, if the ED position is vacant, only the CSM needs to sign.

The maximum number of installments is three to be collected within the first 90 days of residency.

The total balance due will be at the bottom of the Move In Invoice, and once agreed upon and signed, a check for that amount must be collected at the time of financial possession of the unit.

After completing the financial move in with the new resident, the check received should be immediately scanned through the check scanner as part of completing the move-in process.

TIPS Move-In Invoice Summary FAQs





What if the move in paperwork/residency agreement is signed ahead of the resident moving in?

The Move In invoice summary in TIPS allows the ED to input a financial move in date and a physical move in date. This enables the ability to charge correctly for the basic service fee and care/ancillary service fees appropriately. Since the Move In Summary confirms the payment required when a resident takes financial possession, it should be utilized by the ED in the pre-move in process to review the balance due on the financial move in date and should be signed at the time of the review.

What date do I input on the Residency Agreement?

The Financial Possession date in TIPS must match the move in date on the first page of the Residency Agreement.

When do I collect the move in payment?

The day that the resident takes financial responsibility for the unit they have selected is when the initial move in payment is due.