

The Ten Step TIPS Move-In Process

1 Move resident into TIPS from STAR.

2 Log into TIPS from the Applications tab on the Intranet.

3 Complete Initial Assessment with correct Level of Care by clicking *Assessment Tool* button.



Assessment Tool and Negotiated Service Plan

Tips Home New Residents Census Payments Deposits Relocate Charges Reports Admin Assessments

Addison Place: Ass...

**If you experiencing...

Help Desk.

New Assessment Help
Print Blank Assessment 2012

Inquiry Residents

Resident	Assessments	New
Test-1 MoveIn		New

Once new form appears, Click **New** to begin assessment process for resident.

4 Click on the *Inquiry/Move-In* button.



5 Click on **Resident Name**.

Addison Place (1920)

TIPS Month - April 2016

☐ Show Day Respite ☐ Show Previous Tenants ☐ Show Deleted Applicants

Please, Click on the Tenant's name to begin the Move In process.

Need help with a Move In? Select here: ?

Edit	Care	Resident	ResidentID	Status	App fee	Move-In	Delete
[Edit]	Assess	MoveIn, Test-1	12010333	Applicant			Delete Now

6 Complete *Move-In Form* with resident information.

Move In Form

Need help with a Move In? Select here: ?

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

Residency Type

Apartment Number 101 - Studio

Financial Possession Date 2 / 19 / 2016

Physical Move In Date 2 / 25 / 2016

Projected Move Out Date

Service Level Set

Service Points 16

Primary Diagnosis Other - See NSP

Secondary Diagnosis None

Enter date resident takes financial possession of room.

Move Out Date

Enter date resident physically moves in.

Contact Information

First Name Joe Is this Contact the Payor? ☐

Last Name Smith Does this Contact have Financial Power Of Attorney? ☐

Relationship Son Does this Contact have the Power of Attorney for Health Care? ☐

Is this Contact the Executor? ☐

Is this Contact the Primary Care Physician? ☐

Address Line 1 456

Address Line 2

City There

State Indiana - IN

Zip (Postal) Code 12345

Home Phone 111 - 111 - 1111

Message Phone

Email

Comments:

Save

Once form is complete, click **Save** button to bring up charges screen.

Don't Save

NOTE: You must SAVE to keep information which you have entered!

The Ten Step TIPS Move-In Process

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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 Community Fee is paid, i.e. the resident can pay up to a maximum of three installments.

Move In Credits

Need help with a Move In? Select here: ?

Resident ID	12010333	AptType	Studio
Resident's Name	Test-1 MoveIn	Apt Number	101
Financial Possession Date	02/19/2016	Residency Type:	Private
Physical Move In Date	02/25/2016	Service Level	2
VA Deferral:	No		

Additional Charges/Credits: None

NOTE: Please VERIFY ALL INFORMATION BEFORE PROCEEDING.

EXISTING CHARGES/CREDITS:

Click **Update Amount** buttons after making each change; Total Amount Due is automatically adjusted.

Description	Effective Date	Amount	Qty	Applies To:	Corrections?
Basic Service Fee - Studio	02/19/2016	\$90.00	1	201602	Rtn to Move-In Form
		<input type="text"/>			<input type="button" value="Update Amount"/>
Resident Care - Level 2	02/25/2016	\$28.00	5	201602	Rtn to Move-In Form
Monthly Cable	02/19/2016	\$31.60		201602	<input type="button" value="Delete Now"/>
Community Fee	02/19/2016	\$2,736.00	1	201602	Rtn to Move-In Form
		<input type="text"/>			<input type="button" value="Update Amount"/>
Basic Service Fee - Studio	02/19/2016	\$90.00	31	201603	Rtn to Move-In Form
		<input type="text"/>			<input type="button" value="Update Amount"/>
Resident Care - Level 2	02/25/2016	\$28.00	31	201603	Rtn to Move-In Form
Monthly Cable	02/19/2016	\$31.60	1	201603	<input type="button" value="Delete Now"/>
Select Community Fee Payments: 1 (1 - 3 Months)				<input type="button" value="Update Number of Payments"/>	

Note: Update Basic Service Fee and Community Fee separately using the appropriate "Update Amount" buttons. Make all charge changes before clicking the "Continue" button. Any changes to Basic Service Fee or Community Fee must be made on the Main Move In page or re-start the move-in process. If appropriate, update the Community Fee payment schedule over, the first payment will be included with the move-in invoice.

Click **Continue** button after updating amounts.

Total \$7,587.20

*Changing the Basic Service Fee here will also change the Basic Service Fee recurring rate

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

Edit Move In Form [Create CSV](#)

Need help with a Move In? Select here: ?

Solomon Key	12010333	AptType	Studio
Resident's Name	Test-1 MoveIn	Apt Number	101
Physical Move In Date	02/25/2016	Service Level	2
Financial Possession Date	02/19/2016		

PRO-RATED CALCULATIONS		ACTUAL CHARGED	
Standard Daily Rate	\$90.00 per day	Basic Service Fee - Studio	Feb \$935.00
Adjusted Daily Rate	\$85.00 per day	Resident Care - Level 2	Feb \$140.00
Financial Possession of Room	11 days	Community Fee - MoveIn Payment	Feb \$1,000.00
Daily Care Rate	\$28.00 per day	Basic Service Fee - Studio	Mar \$2,635.00
Number of Care Days in House	5 days	Resident Care - Level 2	Mar \$868.00
House Base Community Fee	\$2,736.00		
Adjusted Community Fee	\$3,000.00		

CONTACT INFORMATION

Full Name: _____

Relationship: _____

Address Line 1: _____

Address Line 2: _____

City: _____

State: _____

Zip Code: _____

Phone Number 1: _____

Phone Number 2: _____

Total Due at Move In **\$1,837.00**

If you finalize the move-in, you will not be able to change the move in information.

Click **Finalize Move-In** button.

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

Tips 4 - TIPS Summary

Addison Place (1920)

TIPS Month - April 2016

House Summary			
Total Residents:	28	Average Points per Resident:	18.64
Total House Points:	522	Number of Respite Residents:	0
Number of Respite Residents:	1	Number of Respite out of Invoice:	

Apt	Type	RID	Name	Type	SPTS	Financial Possession Date	MoveOut	Curr. Bal.	Late Fee
101	Studio	12010333	MoveIn_Test-1	Private	16	02/19/2016	MoveOut	\$0.00	\$0.00
102	Studio								

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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: \$5,641.20

LEASOR SIGNATURE _____ DATE _____

CARE MANAGER SIGNATURE _____ DATE _____

EXECUTIVE DIRECTOR SIGNATURE _____ DATE _____

TIPS Move-In Invoice Summary FAQs

Q

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?

A

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

Q

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

What date do I input on the Residency Agreement?

When do I collect the move in payment?

A

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.

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

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