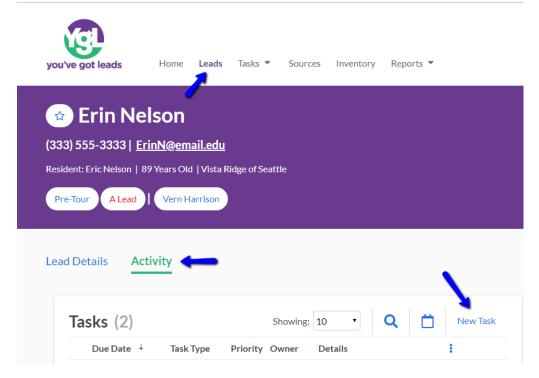
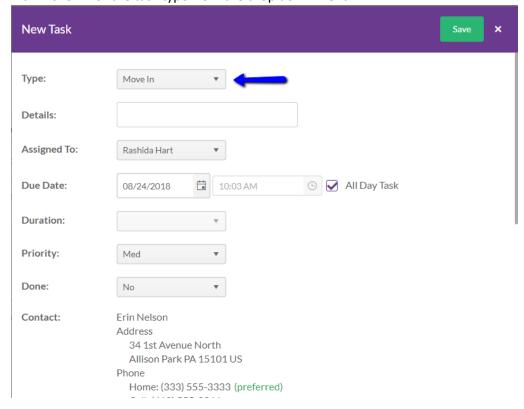
How to Schedule a Move In

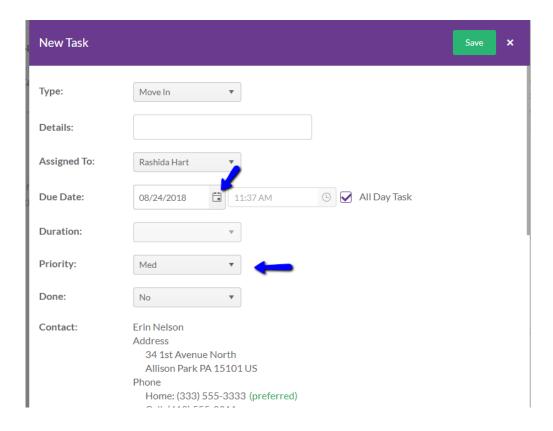
1. Access the lead's task page (Activity link) and select "New Task".



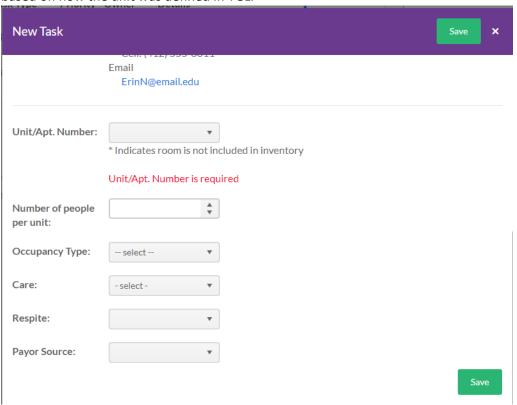
2. Pick Move In for the task type from the drop down menu.



- a. Complete the remaining selections accordingly.
 - 1. Due Date: This is the date the move in will take place. This can be scheduled as a task or appointment.
 - a. Task:
 - 1. Update the date by clicking on the calendar icon.
 - 2. Update the priority selection



3. Update the unit information (Apt. Number, Number of people per unit, Occupancy type, Respite, and Payor source). The care selection will update based on how the unit was defined in YGL.



4. Save

- b. Appointment:
 - 1. Uncheck the "All Day Task" checkbox.
 - 2. Follow the steps for creating a task in addition to the steps below:
 - 3. Update the date as well as the time.
 - 4. The time is updated by clicking on the clock icon.
 - 5. Update the duration
 - 6. Remember to save.