



Are You Losing Residents Before They Move In Doing This?

By Susan Saldibar

Darren Mathis, Founder and CEO of [LincWare](#) (a Senior Housing Forum partner) told me he visited a senior living community recently and asked to see their admissions packet. The CIO said, “Sure, just a minute.” Twenty minutes later, she came back apologizing, “We have most of the forms, but about eight of them are in Mary Jo’s desk drawer. She’s not in and it’s locked. Sorry.” You have to wonder how this would have gone over if Darren had been a resident ready to commit.

At another community he visited, Darren asked the director of sales about how many communications are involved in moving the admissions process along. He thought a minute. “There are a number of people involved in the admissions process. I have my part, then pass things along to others to complete. There are contingencies. If someone fails to follow up or is out sick, it can get hung up. Some admissions processes go smoother than others. It all depends.”

Is something broken here? Why is a process that’s so important so disjointed?

Lurking behind clunky admissions processes is a lack of consistency.

“People don’t realize how much time and effort is spent chasing down papers stored in different places and navigating around missing documents,” He tells me. “Nobody really puts the full picture together. The problem, in most cases, is the lack of a consistent process.”

I asked him what contributes to the lack of consistency. There are a few reasons, as follows:

- **Lack of centralization.** When documents are located in different places, it’s easy to inadvertently leave a key document out of the signing process. If a document has been updated, how do you know if you have the latest version? Do you have to comb through your emails to see if it was sent to you? If you can’t see all your documents in one place, how do you know which ones need to be completed?

- **Lack of simultaneous access.** When documents need to be emailed or, worse yet, snail mailed, precious time is lost, bogging down the process. Some forms may be completed and returned faster than others. Different people are handling different forms, so there's no way of knowing when to expect key documents. And when someone does complete a form, they may not send it out right away. So no one can access the form until they do.
- **Lack of status updates.** If you are relying upon a few individuals to provide status updates, they only reflect the status from their viewpoint. They may be unaware of a document that has just been signed or one that is missing. If a sales counselor has not completed a step or you are waiting on the signature from a relative who lives remotely, how do you know the status? When were they last contacted? How do you know how long he/she has had the documents to review?

A community can also find itself facing potential legal issues when consistency is lacking. Your legal department may think your forms are up to date because they put them out on a shared drive. And yet many people will still take the path of least resistance, using the copy of the form they already have sitting on their computer from last week (or last month). So there is a potentially dangerous perception that files are centralized, so the latest one is always being used. But that isn't necessarily the case. This is anything but consistent!

Consumers won't put up with clunky processes anymore. And they shouldn't have to.

The overall lack of consistency across the admissions process means a lot more time will be wasted as well. That's because so many actions are taken due to not knowing where any given document is in the process of being completed. Emails and phone calls take time. Jotted down notes are easily lost. Memories are not always 100%.

Darren brought up the process of buying a car. "What if the dealer couldn't find a form and had to scramble around for it while you waited? Worse yet, what if they told you that they were out of a key form? What if they told you that you had to come back the next day? Consumers won't put up with that. Many would walk out. And we're just talking about buying a car!"

He makes a good point. Admissions is anything but a car sale. It's a very sensitive process for families. And, as Darren notes, no one suffers like the residents from a disjointed admissions process. "It's already a hugely stressful time," says Darren. "Many of the family members are feeling some guilt over the move-in. The last thing you want is an inconsistent paperwork process. And, if the family forgets to sign something and has to go back in to handle it, it exacerbates an already difficult process."

Darren will share some nuts and bolts tips on tightening up your admissions process to improve consistency and make everyone's part in it much easier. Stay tuned!



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