



Lenbrook

New Resident Checklist

Date:

DAY 1: Reserve Your Residence

Now that you've selected your residence, what do you do next?

- Reserve your residence with a fully refundable \$1,000 **Reservation Deposit**.

DAY 2-30: Start the Application Process

- Complete your **Application for Residency** within the next 14 days and return to Lenbrook by _____. **Please be sure to include a copy (front and back, if applicable) of the following** (or you can bring the original and we will gladly make a photo-copy):
 - Driver's License
 - Social Security Card
 - Medicare Card
 - Secondary Insurance Card
 - First two pages of recent tax return

REQUIRED APPLICATION DOCUMENTS listed below.

In order to meet your targeted settlement and move-in date, the following three steps should be completed on or before 30 days from the date of the initial deposit which is listed at the top of this page.

1. **THE LENBROOK APPLICATION** and copy of the first two pages of a recent tax return (if not already completed).
2. **MEDICAL EVALUATION**
 - a. Schedule an appointment with your **Primary Care Physician** to complete the Medical Exam Form, which Lenbrook will provide to either you or your physician. ***Please note that a TB TEST IS A REQUIREMENT ON THIS FORM.** Once TB test is administered, it must be read by a licensed practitioner within 48-72 hours.
 - b. Lenbrook will fax the document directly to your physician if a fax number is provided; otherwise you will need to take the document to your physician.

- c. Please ask the office to return the completed paperwork to Lenbrook by fax, scan or US Mail.

3. **BASELINE FUNCTIONAL ASSESMENT**

- d. Lenbrook offers this Assessment on-site free of charge Monday through Friday. The assessment usually takes approximately 30 minutes. Erin Moore, New Resident Coordinator, will assist in scheduling this appointment.

If you **live outside the Atlanta area**, you may also schedule an appointment with a licensed **Physical Therapist** of your choice. In this instance, we will provide the assessment forms to the therapist directly.

- e. In most cases, and with a physician's order, Medicare will cover the cost of this assessment. If there is a charge related to the assessment, Lenbrook will reimburse each resident up to \$75 if proof of payment is submitted.

Your completed Application for Residency will be sent to the Review Committee; all Application materials and information are held in strict confidence. Upon final review, you will receive notification that all steps in the application process have been satisfactorily completed!

- Review a copy of the **Residence and Services Agreement, Resident Handbook and Disclosure Statement** in preparation for your upcoming **New Resident Consultation** appointment to make your 10% deposit.
- **Schedule a time for your New Resident Consultation Appointment with your Residency Counselor to make your 10% deposit on or before Day 30.**

Day 30: New Resident Consultation

- **NEW RESIDENT CONSULTATION APPOINTMENT**
 1. **Meet with your Residency Counselor to make your 10% deposit** and sign the Lenbrook *Residence and Services Agreement* and any addenda and receive copies for your files.

2. **Meet Lenbrook's New Resident Coordinator, Erin Moore**

Erin Moore, our New Resident Coordinator, will assist with the scheduling and logistics of your move to ensure your apartment home is "move-in ready".

During this appointment, Erin will review the timeline, the VIP Moving Program, and answer any questions. If you are requesting any custom changes, they should be requested and discussed at this meeting.

To ensure quality and timeliness of any custom changes, all custom changes will be completed by one of Lenbrook's preferred vendors.

3. **Meet and Greet with Nettie Thrash, Lenbrook's clinic nurse**

4. **Get your photo taken** in our Human Resources Department for your Future Resident Identification Card.

DAY 45: REVIEW OF TIMELINE

- **FINALIZE AND APPROVE ANY CUSTOM CHANGES** -Any custom changes requested must be approved and signed as an Addendum to the Residence and Services Agreement. If changes or delays occur in construction after this time due to the resident making changes, the resident will adhere to the agreed upon settlement date as written on the addendum. If there are any delays by the Lenbrook Team, the timeline of the settlement will be adjusted accordingly.

DAY 60: FINALIZE DETAILS OF THE MOVE

- **Have Furniture Layout Complete**
- **Finalize Move date** – Move Managers will work with Erin to finalize your Move Date, book the elevator, and reserve a guest suite if needed.
- **Schedule Settlement Date and Orientation**
- Discuss with Erin Moore the **date your Apartment will be ready for Occupancy**. Lenbrook will provide a Date of Availability Letter 30 days prior to the Settlement Date with all the necessary settlement information including Entrance Fee balance due, prorated monthly fees, and any applicable credits.

Dominique Brittain, Lenbrook's Marketing Coordinator will coordinate the Settlement Appointment and Orientation.

DAY 75: COMPLETE ORIENTATION PAPERWORK AND PREPARE FOR SETTLEMENT

- Review and complete Orientation Documents sent from Lenbrook
 - Identified items from the Orientation Booklet (this will be sent to you prior to your Settlement)
 - Emergency Contact Information
 - A copy of any Powers of Attorney and/or Living Wills
- Confirm Settlement Date and Orientation with Dominique Brittain
- Request certain Comcast Services with Erin Moore, New Resident Coordinator

DAY 90: SETTLEMENT APPOINTMENT – No Later than _____.

- Settlement to occur within the timeline agreed upon at the initial reservation deposit, Physical occupancy can be scheduled any time on or after a Settlement has been completed.
- Receive the keys to your new Apartment and a complete tour and Orientation to Lenbrook, with Amber Parker, our Resident Relations Coordinator.

LENBROOK KEY CONTACTS AND PHONE NUMBERS

RESIDENCY COUNSELOR _____ Phone _____

Erin Moore, Lenbrook's New Resident Coordinator 404-504-2454

Dominique Brittain, Marketing Coordinator – 404-364-3386

Amber Parker, Resident Relations Coordinator – 404-264-3339

BEGIN ENJOYING YOUR LIFE AT LENBROOK!

WE ARE SO GLAD YOU ARE HERE!

Congratulations and Welcome to Lenbrook!

Revised 8/14/14

