



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**.
- Within 5 days of the reservation you will make your 10% deposit.**
- 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.

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
 - Asset summary balance sheet

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). This is part of the requirements for financial approval at Lenbrook.

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 with the exception of Tuesdays. The Assessment appointment usually takes place at 12 noon on our 2nd floor in the Physical Therapy Department. The assessment usually takes approximately 30 minutes. Mary Ann Mullins, Marketing Project 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!

Day 5-10 : New Resident Consultation

□ NEW RESIDENT CONSULTATION APPOINTMENT

1. Meet Lenbrook's Marketing Project Coordinator, Mary Ann Mullins

Mary Ann, our Marketing Project Coordinator, will assist with the scheduling and logistics of your move to ensure your apartment home is "move-in ready".

During this appointment, Mary Ann will review the timeline, the VIP Moving Program- (if applicable), 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.

2. Meet and Greet with Nettie Thrash, R.N., Lenbrook Clinic's Associate Director of Nursing

3. Meet with Cristina or Heather from the L.I.V.E department

DAY 45: REVIEW OF TIMELINE

- **SELECTION FORM - FINALIZE AND APPROVE ANY CUSTOM CHANGES** -Any custom changes requested must be approved and signed as an Addendum to the Residence and Services Agreement (the Building Move-In Selection Form). Once this selection form is signed, construction work is scheduled to begin. 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 Mary Ann to finalize your Move Date, book the elevator, and reserve a guest suite if needed.
- **Schedule Settlement Date and Orientation**
- Discuss with Mary Ann 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.

Rebecca Mack, 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 Rebecca Mack

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- Request certain Comcast Services with Mary Ann Mullins, Marketing Project 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 _____

Mary Ann, Lenbrook’s Marketing Project Coordinator 404-504-2454

Rebecca Mack, Marketing Coordinator – 404-264-3386

Amber Parker, Resident Relations Coordinator – 404-264-3339
(schedule your orientation at Lenbrook)

BEGIN ENJOYING YOUR LIFE AT LENBROOK!

WE ARE SO GLAD YOU ARE HERE!

Congratulations and Welcome to Lenbrook!

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