



Why 40% of Your Communities May be at Risk

By Susan Saldibar

40% of your communities are using the wrong documents.

Or could it be 50%? Could it be even higher? How do you keep track and know for sure? What are the risks you run by using an out-of-date residency agreement or an expired state form?

Most communities don't have a clue, according to Darren Mathis, CEO and founder of [LincWare](#) (a Senior Housing Forum partner). That's scary. Or it should be, shouldn't it? LincWare is the developer of the digital admissions platform called Admit+. For starters, it's 100% paperless, which should be a given for the sensitive process of admitting a new resident. So I was surprised to learn from Darren how many communities remain bound to clunky paper based move-in procedures and all the confusion and legal risks that come with it.

Hey, I found these forms online. Let's download them and use them!

Darren tells me that many customers he speaks with indicate they had no idea incorrect documents were being used. Worse yet, corporate often has no idea when a community decides to introduce new forms and documents just because someone read something online and thought it was a good idea. You have to wonder what kind of legal risks that opens up for communities.

According to Darren, the heart of the problem lies in the document distribution process. "Final executed documents are usually kept at the community location," Darren tells me. "So, there is little visibility across documents. If something is missing, no one knows about it until there is an issue. Then everyone scrambles to find a document that may not have been executed in the first place," he adds.

You may think you have this figured out. You don't.

So, now we know what's not happening. But what is happening? What are communities doing that makes them feel confident that they have checked all the boxes? Here is what they tell Darren they are doing:

1. **"We put all the latest versions of the documents on the file share for everyone to access."**

What's wrong with that? The documents are easily downloaded to their local computers. How do you force them to always go back to the file share? The answer, you can't.

2. **"We print all the latest versions and ship them to each location."**

What's wrong with that? In addition to being costly, this creates a whole host of other issues that add even more cost and complexity to the process. How do you ensure the old versions are being tossed out? How do you quickly update language that needs to be changed as a result of a compliance change? How do you react to pricing updates or amenity changes? What do you do if you run out? What do you do with the old copies? Does it seem like this is good for the environment?

Below are some steps Darren recommends to help communities minimize version control risks.

- **Ownership** - Have clearly defined document ownership roles. Assign a gatekeeper for your documentation and forms. Only that person or group should make any changes.
- **Version Numbers** - Insert document versions numbers and dates into every document in your document package.
- **Community Versions** - Make it easy for communities to access document versions that are specific to their location like names, logos, amenities, pricing, and state specific forms.
- **Easy Access** - Post all documents to an easily accessed file share or document portal. Remove all old document versions to minimize confusion.
- **Document Log** - Keep a spreadsheet with detailed records of all document names, versions, changes, the reason for the change, and owners.
- **Training** - Train all users on how to access documents and make sure they are checking version numbers before having a resident sign.
- **Communication** - Plan documentation changes far in advance of any due dates and send out reminders to all required personnel.
- **Audit** - Set up quarterly audits of signed documentation that checks version numbers and completeness of the documents.

These may seem like time consuming, sometimes tedious tasks to tackle. They are! Darren points out that this is why so many communities don't take any steps at all. Too many other things to attend to. But, that lack of taking charge and taking action may be opening communities up to a potential nightmare. "It's usually not until an audit that the incorrect versions are identified, and the mistakes are corrected," he tells me. "And, at that point, it's often too late."

LincWare has created a few videos that explain how you can streamline and optimize your admissions process. You can watch it [here](#).



This article has been brought to you by [Admit+](#) in partnership with [Senior Housing Forum](#).