

eBook

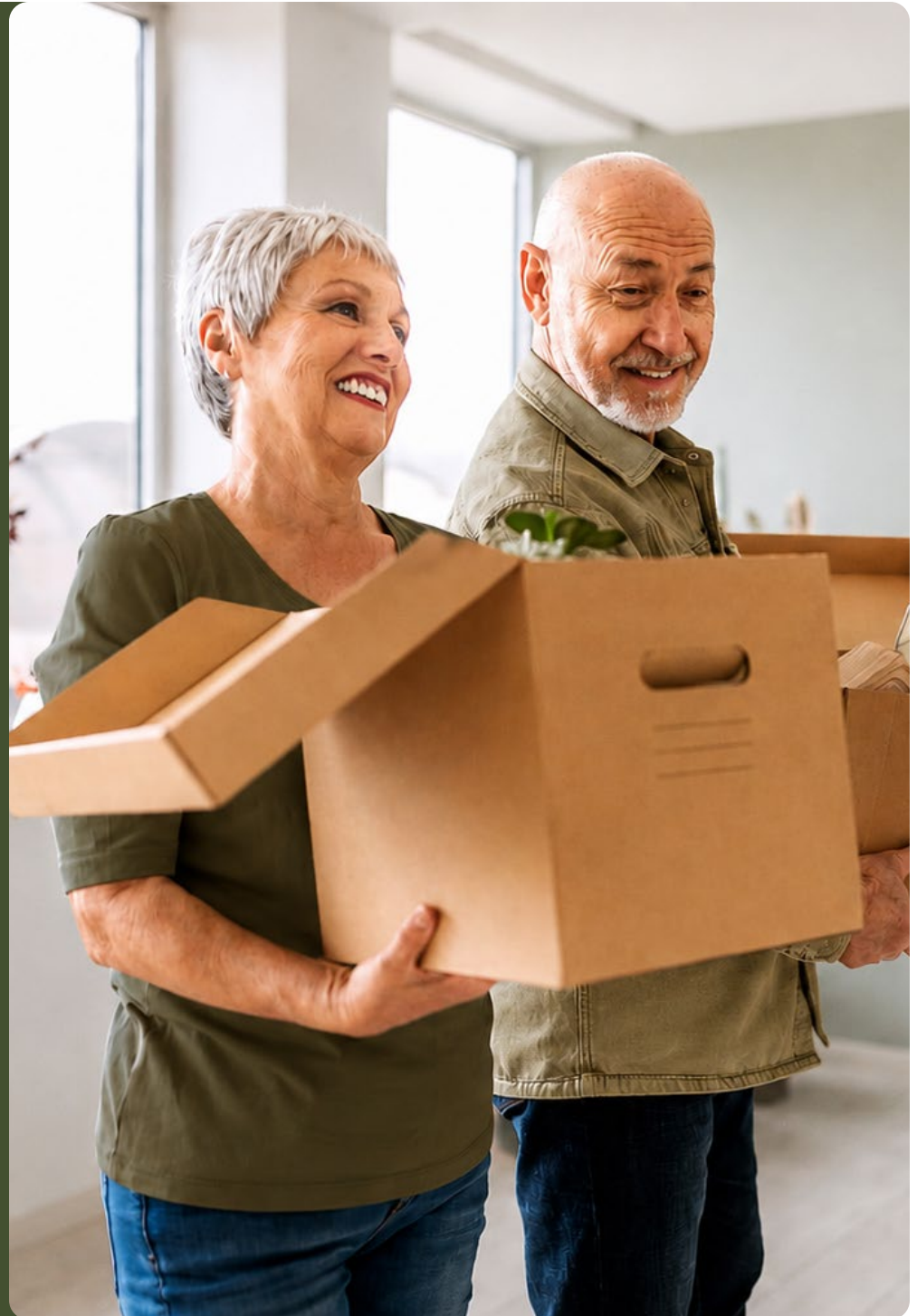
## Mastering Move-Ins

How simplifying move-in documentation protects momentum, staff capacity, and family confidence

[Get Started](#)

**PointClickCare**

 senior sign



# Table of Contents

3

The Documentation Bottleneck  
In The Move-In Process

5

How Documentation Friction Cascades  
Across the Move-In Process

7

The Operational Cost of Manual Move-In Documentation

8

A Purpose Built Approach to Move-In Documentation

10

What Operators Report After Streamlining Documentation

11

Indicators That Documentation Is Constraining  
Your Move-In Process

12

Assessing Your Current Documentation Workflow

13

Key Takeaways for Senior Living Operators

## The Documentation Bottleneck In The Move-In Process

Move-in begins when a resident says yes, a decision that often carries months of emotional weight and careful evaluation. What families expect after that decision is momentum and a clear path from commitment to arrival that feels manageable and respectful of the transition they are undertaking. What they often encounter instead is a series of documents that create friction at precisely the moment when they are looking for reassurance.

As Candice Marcks, Chief Experience Officer at Arete Living, describes it: Imagine, you know, anything new is hard, right? But imagine being at 70, 80, 90 years old, and you finally made the decision, which takes a lot to get there.”<sup>1</sup>

From that point forward, every operational step between decision and arrival depends on documentation being completed and verified, including wellness coordination, compliance checks, apartment readiness, and move-in scheduling. Residency agreements, medication consents, financial arrangements, emergency contact forms, and state-specific regulatory documents must all be finalized before move-in can proceed. When required documentation is difficult to complete or track, move-in momentum slows, and staff are pulled into reactive coordination while families experience delays during a critical stage of the transition.



In many communities, this process still depends on paper-based documentation and disconnected systems. Onboarding teams print packets, schedule signing sessions, scan returned forms, track missing signatures across multiple family members, and re-enter data into operational systems. When generic e-signature tools are used outside senior living workflows, they can introduce compliance gaps.<sup>1</sup>

Candice Marcks describes the burden plainly: “That’s the one thing that gets so overwhelming and can take hours to go through a residency agreement.”<sup>1</sup>

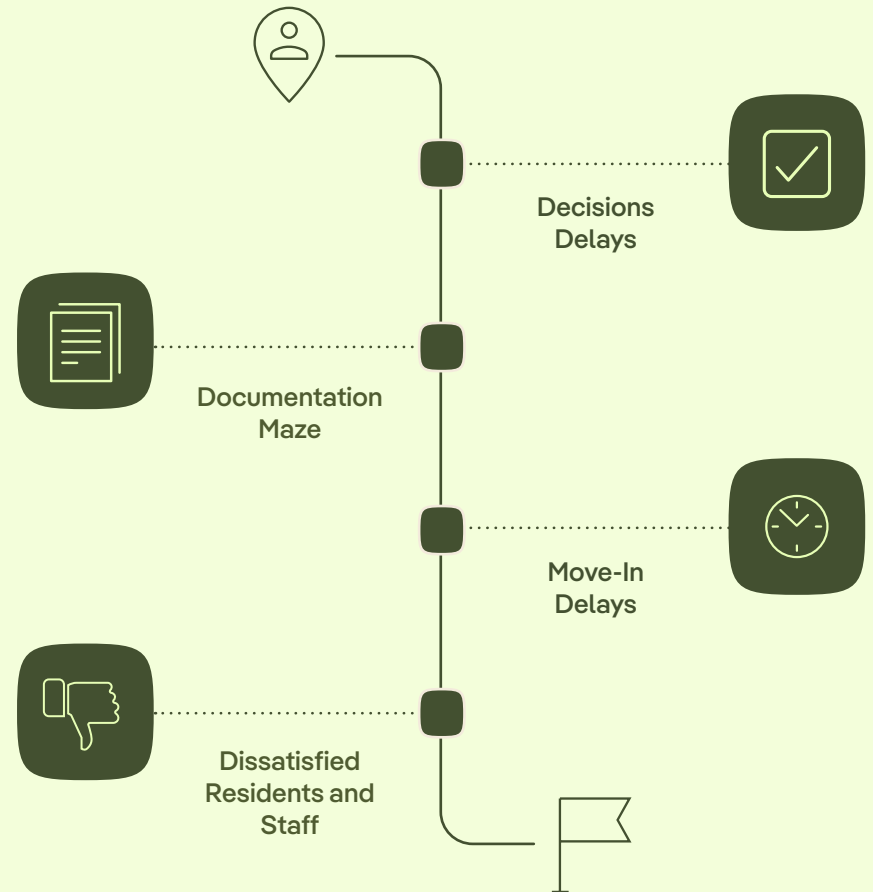
Across every move-in, those hours add up. As documentation delays affect downstream preparation, the impact extends into operational uncertainty, compressed schedules, and reduced capacity for the personalized welcome that residents and their families remember most.



“That’s the one thing that gets so overwhelming and can take hours to go through a residency agreement.”<sup>1</sup>

Candice Marcks,  
Chief Experience Officer, Arete Living

### Hidden Hurdles of Manual Move-Ins



# How Documentation Friction Cascades Across the Move-In Process

Documentation is not the reason a family chooses a community, but it leaves a lasting first impression. While residents and families evaluate a community based on care quality and staff warmth, the real moment of truth comes during the move-in process and the first ninety days. When documentation runs smoothly, it gives staff the time and space to deliver on that promise, with a warmer welcome, more attentive care, and a transition that feels supported from the start. In shaping that welcoming experience, it is important to view the transition from the resident's perspective and focus on what makes the journey feel smooth, supportive, and successful.



## Family Experience

- Unclear next steps
- Multiple signing sessions
- Coordination across locations
- No visibility into status



## Staff Impact

- Time lost to printing, scanning, filing
- Manual tracking and follow-up
- Constant task-switching
- Rework for incomplete submissions



## Operational Risk

- Missing witness signatures
- Incomplete audit trails
- Delayed preparation across departments

For residents, the first ninety days are not simply about adjusting to a new environment, but a continuation of the decision-making process. During this time, residents and their families directly experience whether a community delivers on expectations and whether they feel seen, safe, and supported. When the move-in process is hindered by a poorly executed documentation process, it can undermine confidence in an otherwise positive decision.

In practical terms, documentation status directly determines whether downstream preparation can move forward. Move-in coordinators rely on completed agreements to confirm dates, wellness teams need health assessments to develop care plans, financial teams require signed fee schedules to process deposits, and compliance officers depend on complete packets to ensure readiness. When documentation is incomplete, these groups are forced to delay, work with partial information, or spend additional time on manual follow-up.



# The Operational Cost of Manual Move-In Documentation

Manual documentation consumes staff time in both visible and hidden ways, beginning with the obvious demands of printing packets, coordinating signing sessions, scanning forms, filing documents, and following up on submissions. As these routine tasks accumulate, they introduce less visible costs such as frequent task-switching and fragmented workflows, which increase coordination overhead across teams. This growing complexity often leads to rework when submissions are incomplete or inconsistent, further compounding inefficiencies and extending turnaround times. Ultimately, these combined pressures create a meaningful opportunity cost, pulling staff attention away from supporting residents and families during a critical transition.

The burden falls heavily on move-in coordinators, who must explain forms, resend packets, schedule signing sessions, track returns, verify compliance, reconcile discrepancies, and coordinate across departments. This extends to operations teams that cannot finalize assignments, care teams working within compressed timelines, finance teams experiencing billing gaps, and compliance officers managing risk when documentation is incomplete.

## Where the cost of manual documentation shows up in daily work:



Time spent printing, scanning, and reassembling packets



Rework from inconsistent or incorrect documentation



Coordination overhead across multiple departments



Delays caused by missing or incomplete submissions



Staff time lost to tracking signatures and follow-ups

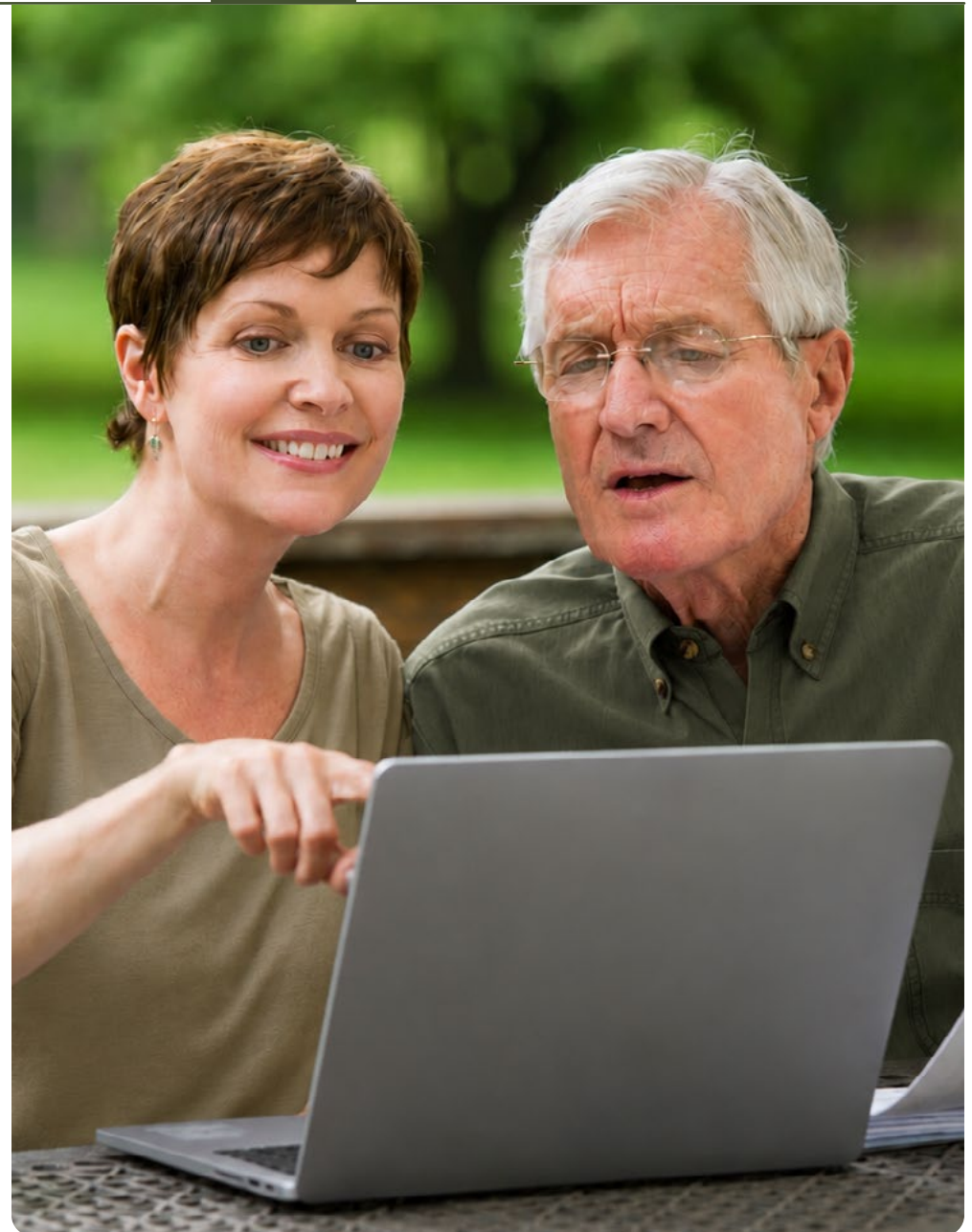


Slowdowns in move-in readiness and downstream scheduling

## A Purpose-Built Approach to Move-In Documentation

Many senior living communities still rely on paper-based processes or disconnected tools to manage move-in documentation, even as demands on staff and expectations from families continue to grow. As a result, the inefficiencies described earlier are not isolated issues but part of a consistent pattern where time is lost to coordination, visibility is limited, and delays ripple across the move-in process.

Senior Sign, a PointClickCare partner-powered solution, addresses this challenge by bringing structure to a process that is often fragmented and difficult to manage. Purpose-built for senior living workflows, it replaces manual, paper-based coordination with a paperless, compliance-ready approach that guides documentation from initial delivery through signature collection, verification, and integration with operational systems<sup>2</sup>. Rather than relying on manual tracking and follow-up, the process moves through a coordinated digital workflow that keeps all participants aligned and progress visible.



For staff, this means tasks that once required printing, scanning, emailing, and reconciling across systems are consolidated into a single environment with real-time visibility and immediate access to completed documents across departments. For families and residents, Senior Sign is purpose-built to be stress-free and intuitive. Documents arrive in a clear sequence, can be reviewed at any time, and can be signed remotely from any device, with multiple signers routed automatically. The experience is designed with seniors in mind, so every step feels straightforward rather than overwhelming.

Senior Sign integrates directly with the PointClickCare EHR for Senior Living, allowing documentation to flow into resident records without re-entry. This supports faster coordination across teams while reducing errors and compliance risk. Within the EHR, staff also gain visibility into packet status and key details, and can launch Senior Sign to create a new packet directly from their standard workflow.

### Three Ways Senior Sign Transforms Move-In Documentation



#### Reclaim Staff Time

- Eliminate printing, scanning, manual tracking, redundant coordination



#### Resident-Friendly Experience

- Remote completion from any device, no in-person appointments



#### Manage Compliance Risk

- Complete audit trails integrated with EHR workflows

## What Operators Report After Streamlining Documentation

When documentation processes are streamlined, communities report measurable improvements in daily operations, including faster completion times, improved visibility into status, and fewer administrative bottlenecks.

At Arete Senior Living, leadership highlights operational gains that extend beyond speed alone, including more efficient closing processes, greater flexibility for families, and reduced reliance on physical document storage.

These outcomes reflect broader changes in how move-ins are managed. Faster documentation completion reduces delays in downstream preparation, clearer timelines support better coordination across teams, and improved coordination creates more capacity for staff to focus on residents and families during the transition.



**“Senior Sign shortens the closing process, allows remote signing, and eliminates the need to store contracts in file cabinets.”**

Thomas Cloutier,  
Chief Marketing Officer, Arete Senior Living <sup>3</sup>

### Before: Manual Documentation Process

- Print and assemble packets
- Coordinate in-person signing sessions
- Scan and file documents
- Track completion manually across multiple parties
- Re-enter data into operational systems
- Store and manage physical files



### After: Streamlined Digital Documentation

- Select and send required forms digitally
- Enable remote signing across all participants
- Automatically store completed documents
- Provide real-time visibility into status
- Sync data directly into operational systems
- Maintain a complete digital record

## Indicators That Documentation Is Constraining Your Move-In Process

Early signs that documentation is constraining the move-in process often appear in day-to-day operations before they become systemic issues. These signals surface when families seek clarity, staff absorb additional coordination work, and compliance or readiness checks begin to slow. In many cases, these challenges are not tied to a single breakdown, but to accumulated friction across multiple steps in the documentation process. Over time, this creates inconsistency in how information is tracked, shared, and completed, making it harder for teams to maintain momentum and visibility as move-in dates approach.



### Signs of Documentation-Driven Friction

- ❌ Families frequently ask what documentation is outstanding or where to submit forms
  - ❌ Staff spend significant time printing, scanning, filing, or tracking document status
  - ❌ Missing signatures or incomplete packets are discovered late, requiring rushed follow-up
  - ❌ Compliance verification requires manual reconciliation across folders or systems
  - ❌ Staff work overtime to meet move-in dates
- ⚠️ These patterns signal constrained capacity that can be recovered through more structured documentation processes.

# Assessing Your Current Documentation Workflow

Assessing your current move-in documentation workflow means taking a structured, end-to-end view of how move-in documentation is initiated, processed, and completed across teams. The purpose is to move beyond assessing individual issues and understand how the full workflow functions from decision to day one.

Begin by mapping a single move-in in detail and trace each step, handoff, delay, and manual action required. Focus on how information moves between teams, where it requires follow-up to progress, and where visibility into status becomes limited or fragmented.

Identify where families require clarification, where staff time is consumed by avoidable follow-up, where compliance gaps begin to emerge, and where departments are waiting on status updates. These observations help pinpoint where workflow structure is introducing friction into execution.



## Key Takeaways for Senior Living Operators

Move-in documentation sits at the point where commitment becomes execution, where family confidence is either reinforced through smooth follow-through or undermined through disjointed coordination. While communities cannot eliminate emotional complexity, they can eliminate unnecessary friction.



Senior Sign addresses this by streamlining documentation with infrastructure purpose-built for senior living operations<sup>2</sup>. It replaces fragmented manual processes with an integrated digital workflow that improves visibility, reduces administrative burden, and restores capacity for the human elements of move-in that matter most. The result is more consistent execution across teams, fewer delays driven by documentation gaps, and a more coordinated path from decision to move-in.

[Learn more](#)

## References

- <sup>1</sup>“Mastering Move-Ins: Strategies for Enhancing the Resident Experience.” PointClickCare Webinar, 2026. <https://pointclickcare.com/resource/senior-living-software/webinars/mastering-move-ins-strategies-for-enhancing-the-resident-experience/>
- <sup>2</sup> PointClickCare. “Senior Sign.” PointClickCare Product Page, 2026. <https://pointclickcare.com/products/senior-sign/>
- <sup>3</sup> PointClickCare. “Senior Sign Customer Success Story.” PointClickCare, 2026. <https://pointclickcare.com/customer-success-story/senior-sign/>

PointClickCare is a leading health tech company with one simple mission: to help providers deliver exceptional care. With the largest long-term and post-acute care dataset, we power AI-driven healthcare to deliver intelligent transitions, insightful interventions, and improved financial performance. Enhanced by our Marketplace of 400+ integrated partners and trusted by over 30,000 provider organizations and every major U.S. health plan, we're redefining healthcare, so it doesn't just survive — it thrives.

[Discover more](#)

**PointClickCare**<sup>®</sup>

Scan to  
Discover more

