

# Resident intake and assessment processing

This workflow automates the complete resident intake process from initial inquiry through care plan creation, ensuring comprehensive assessment data collection and seamless integration across care management systems.

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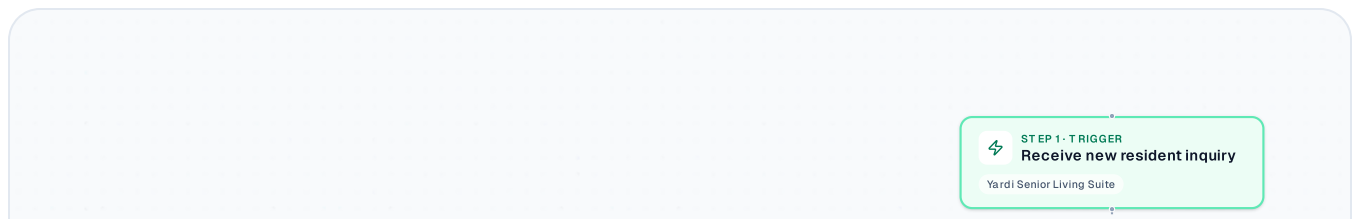


## WORKFLOW TRIGGER

New resident inquiry form is submitted through facility website or referral partner portal

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Receive new resident inquiry

A prospective resident or family member submits an intake inquiry form with basic demographics and care needs. The system captures this

information and initiates the assessment workflow.

## AI Business OS

Yardi Senior Living Suite

2

 ACTION

### Create resident profile record

System automatically generates a new resident profile in the care management platform using submitted information. Initial care level classification is assigned based on preliminary needs assessment.

Point Click Care

MatrixCare

3

 ACTION

### Schedule comprehensive health assessment

System identifies available nursing staff and schedules a comprehensive health evaluation appointment. Assessment forms and medical history questionnaires are automatically generated and sent to family.

SimpleLTC

CareVoyant

4

 DECISION

### Evaluate care level requirements

Based on completed health assessment data, the system determines if the resident requires basic assisted living, memory care, or skilled nursing services. This decision routes the workflow to appropriate care planning protocols.

Point Click Care

AL Advantage

5

 ACTION

## AI Business OS

### Generate personalized care plan

System creates a detailed care plan including medication schedules, activity preferences, dietary requirements, and staff care instructions. Care team assignments are automatically determined based on resident needs and staff expertise.

MatrixCare

SimpleLTC

6

⚙️ ACTION

### Setup family communication portal

Automated creation of family access accounts with personalized dashboards showing care updates, visit scheduling, and billing information. Welcome packets and orientation materials are digitally delivered.

CareVoyant

Yardi Senior Living Suite

7

📄 OUTPUT

### Complete intake documentation package

Final resident file is compiled with all assessment data, care plans, emergency contacts, and legal documentation. Staff receive automated notifications to begin care delivery and family receives move-in confirmation.

Point Click Care

AL Advantage



## Outputs

- Complete resident care profile with personalized care plan
- Automated staff care assignments and schedules
- Family communication portal with access credentials



## Key Metrics

- Average intake processing time
- Assessment completion rate
- Family satisfaction score with intake process



## Tools & Integrations

- Point Click Care
- MatrixCare
- CareVoyant
- Yardi Senior Living Suite
- SimpleLTC
- AL Advantage

## AI Business OS

## AI Business OS

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