



TRACKING SUBSYSTEM

The purpose of this subsystem is to allow managers to track and report on non-compliance with association covenants, delinquency, architectural requests, and other items required by the board or the owner of a rental property.

The Tracking Subsystem includes three parts: defaults, member/tenant violations and reporting.

SET DEFAULTS

The defaults include the “master copies” for enforcing covenant restrictions and fulfilling architectural requests in a fair, consistent and timely manner. By properly completing and using the defaults, a manager can ensure due process for all events.

Tracking

This system can be used to track Delinquencies, Violations or Requests. The Steps define the process for the items tracked.

They can be used in any order or skipped as you set up particular trackable items below, so keep them generic, such as 'Board Review' or 'First Warning'.

Tracking Steps	Description
1. First Warning	6. Sent to Attny
2. Second Warning	7. Payment Plan
3. Sent to Committee	8. Tow/Paint/Cleanup
4. Board Review	9.
5. Board Action	10.

Trackable Items
Set up delinquencies, covenant violations, architectural requests and all other processes you need to track.

ID	Description
ARCH	Architectural Review
PARK	Parking Violation

Buttons: Add, Edit, Delete

Right sidebar buttons: General Defaults, Check Printing, Email Setup, Tracking, User Fields

Bottom buttons: OK, Cancel

To establish Tracking defaults, select the “Set” menu from IPM’s main window, then choose Set System Defaults. On the right side of the screen, select “Tracking.” This will display the Tracking page.

The Tracking page is divided into two sections. At the top, you can define the steps taken for all trackable items. These rules can be used later in any order to define the steps to take for

a particular violation or request. We recommend keeping the description crisp and generic – “Send to Board” rather than “Let the board look it over” – as these descriptions will show in the history for any event recorded through the system. Also, you may have some steps that apply to only one process rather than all, such as “Send to Arch. Committee” or “Apply for Permit”.

The bottom section lists the violation types you’re currently managing. These are available to be used for all members/tenants as the template for specific actions. For example, if everyone has to have a paint color approved by the Architectural Committee, you can set up a request here, and use it every time someone requests a review. Click the Add button to add a new violation or request. This will present the details for the new violation/request or to edit an existing item.

Fill in a brief description in the Rule ID; this is a handy reference. The Title will show on reports and history.

The Citation information should be copied from your governance documents, and provides the legal force for your policy.

Rule ID ARCH Title Architectural Review

Citation from Covenants/Agreements
122.23.3a All paint colors to be used on any exterior surface of any structure, installation or permanent appurtenance on any property within the Community must be approved by a majority vote of the Architectural Review Committee and approved by the Board of Directors.

Verbiage for Notices
Please submit your Architectural Review form, enclosed. The Architectural Review Committee will evaluate it and call you if they have any questions. It will be considered at the next full meeting of the

Default Letter Arch Letter 1

Steps to Resolution	Days	Fine/Fee	Acct	Steps to Resolution	Days	Fine/Fee	Acct
1. Arch. Committee Rev	30			6.			
2. Board Review				7.			
3. Board Action Taken				8.			
4.				9.			
5.				10.			

OK Cancel

The Verbiage for Notices should include a) a translation of the citation above so your members know what you're talking about and b) the steps they need to take next. This is available for adding to member form letters.

If there is a letter for this particular violation or request, select it from the "Default Letter" dropdown. In many cases there will be one "generic" letter, and more specific ones later on in the process.

The remainder of the screen allows you to set the steps to take in resolving the issue. If any step has a time limit, or a fee associated with it, you can enter it here. If there is a fee associated, we recommend entering a default account number to which the income is posted when the fee is paid.

Click OK when you've completed or edited the entry, and it will be saved. You'll see it listed on the Set System Defaults/Tracking screen at the bottom.

MEMBER/TENANT TRACKING

The Tracking system is tied to each member, and available on the Member/Tenant screen. Select the "Tracking" button to access the Tracking screen.

The Tracking Items screen is divided in to three areas. At the top, you have a recap of the tenant and unit. From here you may select to view all, open or closed trackable items from the "View" dropdown. To print a summary of the tenant's items, click the Print Summary button.

Members for Property HOA [Condo & Home Owners assoc.]

Unit 1001 Name Grace Hall

Address 1600 Leaf Lane City Hayden Lake State ID Zip 83835 Print Unit Nbr [Y] Use Alt. Address []

Phone Nbr (208) 595-3453 Ext() Soc Sec Nbr 034-62-3522 Tenant Occupied [X]

Cell Nbr [] Email [] Email []

Drivers Lic ID 34234 23 Unit SQFT 1500

Security Deposit \$0.00 Day Fees Due 1 Billing Cycle (M,W,B) M

Date Sec Deposit [] Direct Deposit [] Amount \$0.00

Last Mo Deposit \$0.00 Nbr NSF Checks 0 Last Delinquency []

Cleaning / Pet Fee \$0.00 Nbr Times Late 0 Lien Date []

Alert Information Many needs to talk to her!

BirthDate 01/06/1945 Date []

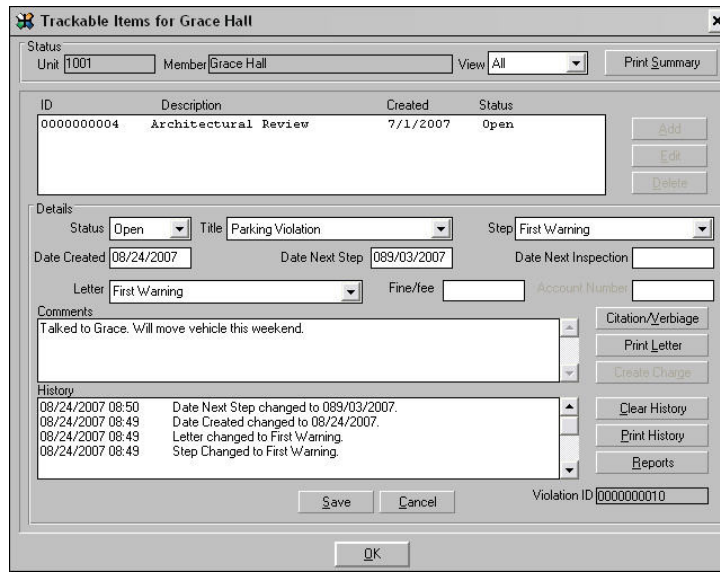
Search Find << Previous Next >> Modify Add Delete Cancel Save OK

Member Business Lease Alt. Address Comments Charge/Due Login Ledger Member Report Payments Charges Tracking Print Label

The second area includes a list of all the items conforming to the View dropdowns discussed above: all items, open items or closed items. Click on one of these items to select it, and double-click it to edit it. 'Edit' and 'Delete' buttons are also available at the right once an item is selected.

The largest area of the screen is the "details" area. This area contains all the information about the selected trackable item. From the top down, there's the "status" dropdown that allows you determine if the item is "open" or "closed" for reporting and viewing purposes. Beside that is the dropdown containing all the defined "trackable items". For new items, you can select one of the items in the list, or type in a new title. If you type in a new title, no steps will be available, and you will have to manage the process yourself. If you select a trackable item established through

the system defaults, the steps will be listed in the "steps" dropdown. The Date Created will automatically be filled when you save the item, and the Date Next Step will be calculated if the step you've selected has a "days" value assigned. You may change this date or the Date Next Inspection manually. The Letter will have the default letter you established for the particular item, but you can select any other Form Letter. Fines and Account numbers are also the ones you defined for the step. You can change the fine amount, and enter other account numbers when you create charges. Changes made to any of these fields are automatically logged in the History box as the bottom of the screen.



You may type in any information in the Comments box. This is a good place to record steps you've taken with residents, calls you need to make and their outcome.

At the right side of this sections are buttons that allow you to easily Create Charges if a fine is defined, print letters if a letter is defined, or view the citations and verbiage established for that particular item.

Beside the History box, you have tools to manage the history and reporting of this item. You can clear the history, print a list of the history, or access IPM's Tracking reports from here.

TRACKABLE ITEMS REPORTING

IPM includes three reports, with many options to customize to meet your needs. The reports are a Summary, a detail report and a history report.

The summary report is list form, with identification and date information. It is intended for day-to-day management and board reporting.

The Detail report includes all the items on the Tenant/Member tracking screen, and can be used to document your process with the tenant/member.

The History report allows you to print the history of one or more tenants. This report is provided as the history can become voluminous over time, especially when handling a delinquency. All these reports can be previewed, printed, exported or constrained like most other standard IPM reports.

