Community Fact Sheet

Community Fact Sheet

The Community Fact Sheet is a convenient place to capture and store all the important information about each community you manage. Then anyone in the management office can look-up the information to answer questions or take action on a problem. The information in the Community Fact Sheet can also be used for completing resale packages since it shows stats like number of home, number of renters.

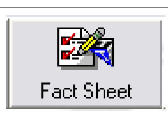
Many management companies keep notebooks as a reference to the office staff with similar information as the Community Fact Sheet. Using the Community Fact Sheet can be a replacement for this notebook or, at least, a more convenient way to keep the information updated. You can print a report for just a selected page or for all the pages in the Community Fact Sheet.

The Community Fact Sheet is broken up into sections by menu tabs. The sections are:

- **General** – Information such as the Association Type (Condo, HOA,etc), Development Completed, Turnover Date, Monthly Board Meeting Schedule, Number of Homes, Number of Renters, and more.
- **Location & Access** – Where the community is located, driving directions and access info if the community is gated or has an entry system.
- **Amenities** – The improvements or recreational facilities that are available to residents of the community. These might include a community pool, clubhouse, playgrounds, putting green.
- **Legal** – A place to capture community policies such as, Late Fees, Architectural Changes, Rental Policies, Right of First Refusal, Screening and Orientation, and more.
- **Insurance** – Enter all of the insurance policy information for each type of insurance carried by the community. You can define the insurance policy types, the select the insurance company from the Vendor file or enter them manually.
- **Contractors** – A place to capture who the current contractors are for the community such as, the lawn maintenance company, electrician, plumber, snow removal company, etc. You can define the Contractor types that apply to your community, then select the company from the Vendor file or enter them manually.
- **Special Info** – Information about the community that you wish to keep track of. There are a number of blank fields you can label, the enter custom information into the data fields.
- **Attorney** – The law firm this community uses for legal opinions, legal issues, and collections and compliance actions.

The Community Fact Sheet is intended as an efficiency and convenience tool that lets anyone in the management office answer questions or handle problems, not just the community manager. If you take the time to complete the information, it will be a huge benefit to everyone in the office.

The following explains each page in the Community Fact Sheet.

	From the main TOPS menu, click on the **Fact Sheet** button.

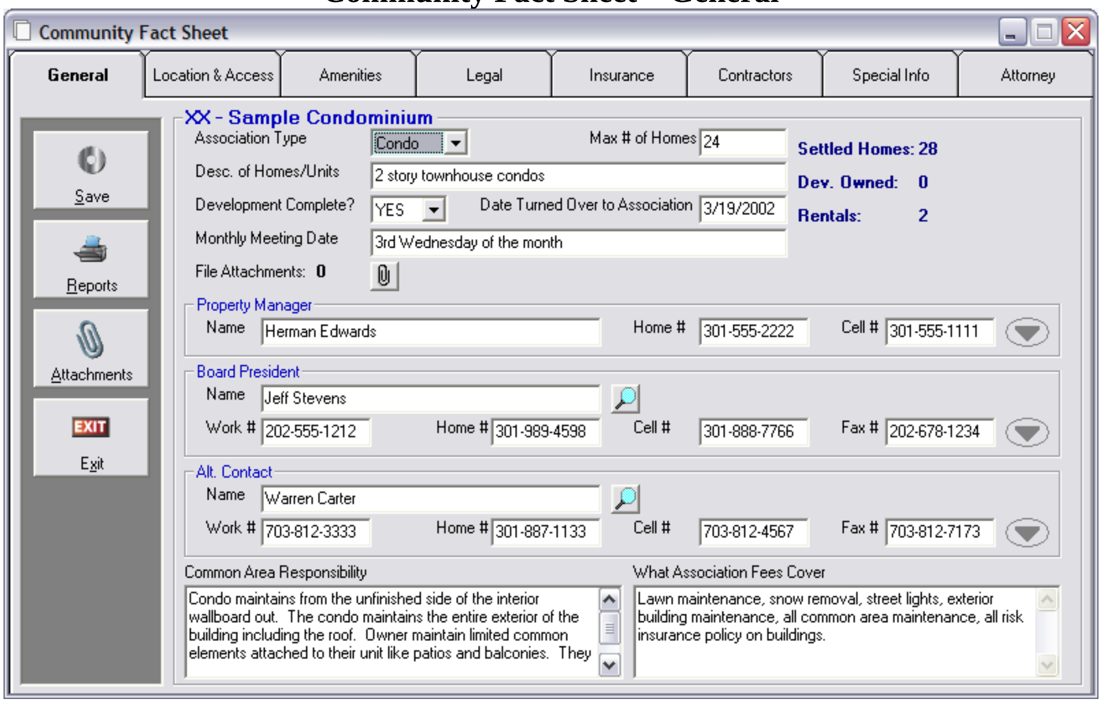
General

Information such as the Association Type (Condo, HOA,etc), Development Completed, Turnover Date, Monthly Board Meeting Schedule, Number of Homes, Number of Renters, and more.

	When the Community Fact Sheet opens, it automatically goes to the General screen. But you can also click the **General** page to go back to it from another menu tab to view the information which includes the following:

You will see the first page of the Community Fact Sheet that stores the **General** information for this community:

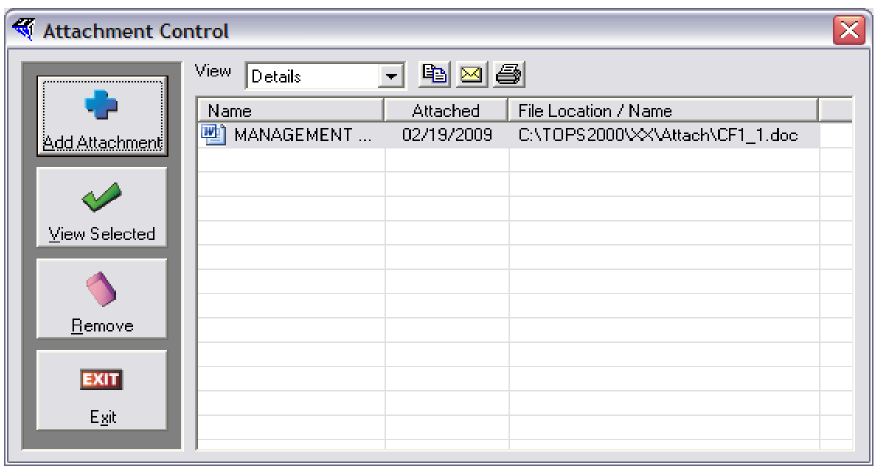
Community Fact Sheet – General

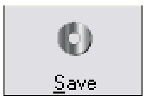


Notice that the Community Fact Sheet is organized into menu tabs across the top of the screen. Click on any of these tabs to view or change the information contained on this screen.

We'll review each of the data elements on each screen beginning with the **General** page.

Association Type	The legal organization type for the community. Use the down browse arrow to select from these preset choices: • **Co-op** – a cooperative community • **Condo** – a condominium • **HOA** – a Homeowners Association • **POA** – a Property Owners Association • **PUD** – a Planned Unit Development Select the Association Type that best fits this community.
Max # of Homes	Enter the total number of homes that either are or will be part of this community when the community is completely built-out.
Stats	On the right hand side of the screen you will see computed stats which include: • **Settled Homes** – The number of homes that have homeowner records.

	• **Developer Owned** – The number of homes that have Builder/Developer owned homes. • **Renters** – The number of homes with Renter records. The totals are computed automatically from the home and owner records. They can be handy when completing resale and loan disclosure forms.
Descr. Of Homes/Units	A free form field to describe the housing type, like townhouse, duplex, garden style condo, etc.
Development Complete?	Has the community reached its full and complete size yet or is the Builder/Developer still building new homes. Use the down browse arrow to choose either YES or NO.
Date Turned Over to Association	Enter the date the Builder/Developer turned over control of the community to the homeowner officers. If the Builder/Developer is still in control, leave this date field blank.
Monthly Meeting Date	The day of the month for the regularly scheduled Board Meeting, if any.
File Attachment	Click on the paper clip icon to either view existing attachments, such as an electronic version of the community's Declaration and ByLaws, or be able to scan in a new attachment.  Any existing Attachments would be listed on the screen above. You could click on one to open and view it. **Add Attachment** – Click this button to open a browse screen where you can select a new Attachment to store in this community. You can name each Attachment whatever name you wish. **Remove** – Click to highlight an Attachment, then click the Remove button to permanently erase an Attachment. For more information on Attachments, see the Attachments section later in the Community Fact Sheet manual.
Property Manager	The name, home phone and cell phone #'s for the community's manager.
Board President	The name and contact info for the community's Board President. It's handy to capture this information here so you can easily contact this officer when issues

	arise or decisions need to be made.
Alternate Contact	The name and contact info for a secondary community officer. In the event the Board President or main officer contact is not available, this is the person to contact when issues arise or decisions need to be made.
Common Area Responsibility	A free form text area to enter a complete description of the community's areas of responsibility for maintaining the common area. For example, does the community pay for common area lawn maintenance, snow removal, street lighting, etc.
What Association Fee Covers	A free from text area to describe the major expenses and services, like Trash Removal, that the community pays for from the maintenance fees.
	Click the **Save** button to save your changes.

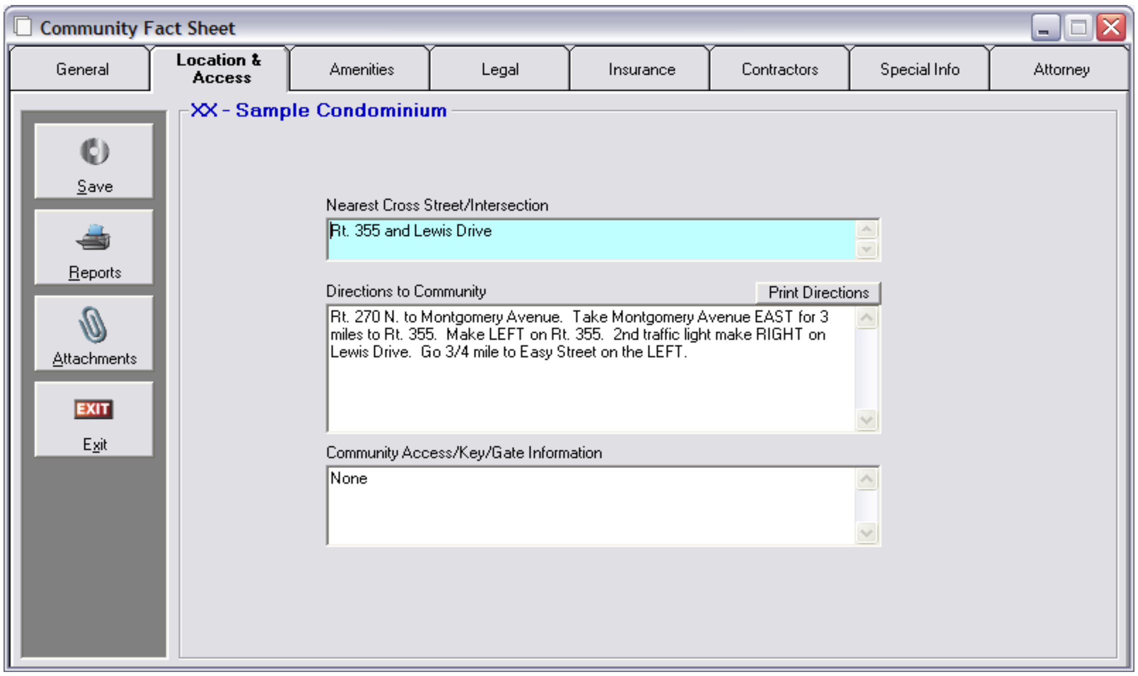
Location & Access

Where the community is located, driving directions and access info if the community is gated or has an entry system.

	Click the **Location & Access** tab to view the information on this screen.

You will then see the Location & Access screen.

Location & Access



This stores the location of the community, driving directions, and any access information. This can be important info for an on-call manager who is trying to handle an after hours emergency.

We're review each of the data elements on this screen.

Nearest Cross Street/Intersection	A free form text field to enter the nearest major intersection to the community. You can leave this blank if not needed.
Directions to Community	For management companies, a free form text field to enter the turn-by-turn directions from your office to the community. Click the **Print Directions** button  to print these directions.
Community Access/Key/Gate Information	A place to record free form text instructions if the community has a gate or entrance code in order to gain access to the community. You can leave it blank if it is not needed.
	Click the **Save** button to save your changes.

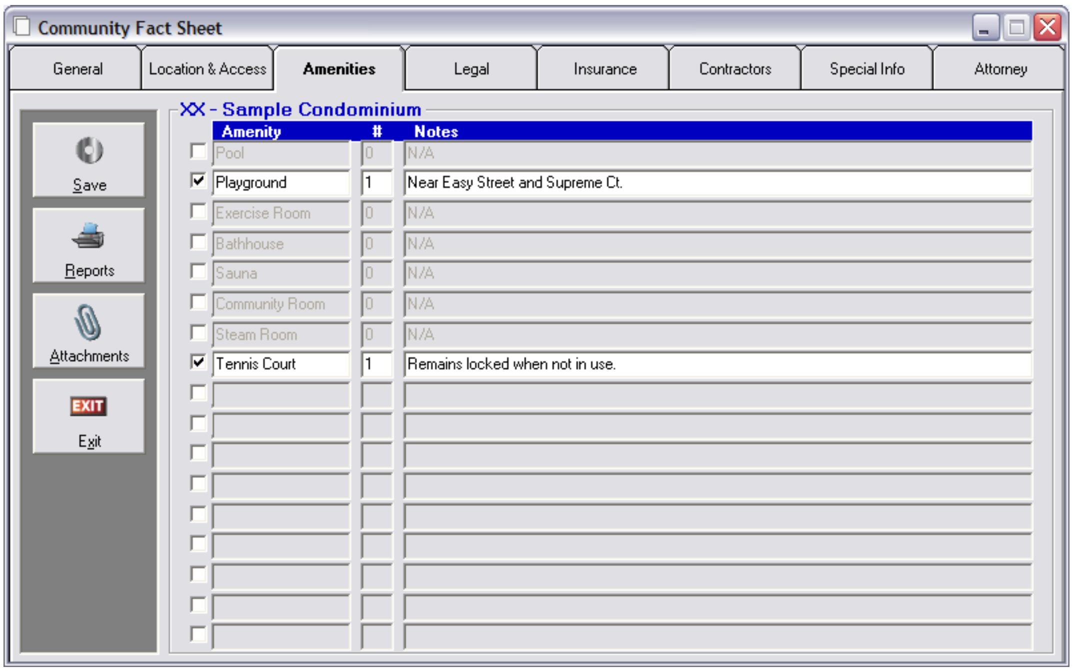
Amenities

The improvements or recreational facilities that are available to residents of the community. These might include a community pool, clubhouse, playgrounds, putting green.

Here you can list the facilities and improvements to the community that are available for use by the residents. Examples would be, pool, clubhouse, playgrounds, tennis courts, tot lots, etc.
Click the **Amenities** tab to view the information on this screen.

You will see the **Amenities** screen:

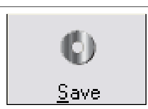
Amenities



All the facilities and improvements listed on this screen are user defined. There are a few pre-defined Amenities to get you started, but you can simply type over the name of the Amenity to change it.

To activate a field, simply checkmark it  , then enter the Amenity name, # (quantity) and the Notes with location or other identifying information. A new Amenity item would look like this:

The Amenities are all user-defined, so you can enter any information you wish into these fields.



Click the **Save** button to save your changes.

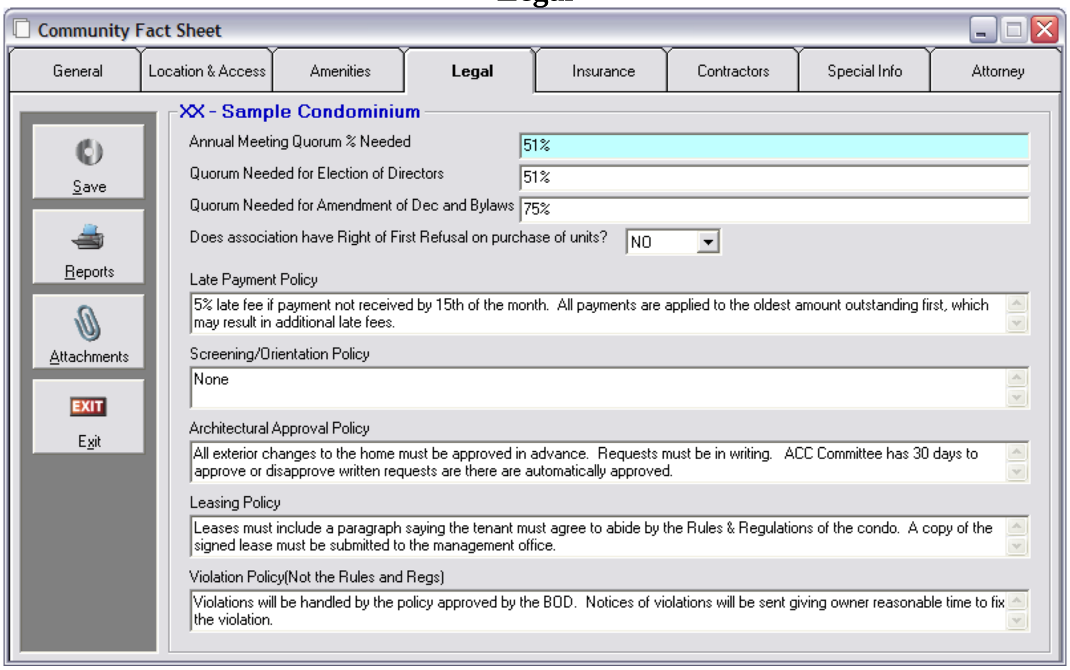
Legal

A place to capture community policies such as, Late Fees, Architectural Changes, Rental Policies, Right of First Refusal, Screening and Orientation, and more.

	Through the **Legal** screen you can enter the Legal policies and procedures of the community, such as, meeting quorum %'s, right of first refusal on sale of homes, late fee policy, renters policies, etc.

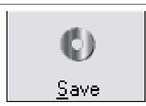
You will see the **Legal** screen:

Legal



The Legal screen is the place to capture a lot of the important legal policies and procedures specified in the community's organizing documents or those approved by the community's officers.

Annual Meeting Quorum % Needed	A free form text field to enter the percentage needed in order to transaction business at an Annual Meeting.
Quorum Needed for Election of Directors	A free form text field to enter the percentage needed in order to hold an election of the Board of Directors.
Quorum Needed for Amendment of Declaration and Bylaws	A free form text field to enter the percentage needed in order to pass an amendment to the community organizing documents, such as the Declaration of Covenants, Conditions & Restrictions and the Bylaws.
Right of First Refusal	Does the community have a "Right of First Refusal" on the purchase of homes in the community? This would have to be a right given to the community in it's organizing documents. It allows the Board of Directors to interview perspective purchasers and approve their purchase of the home. The only choices here are YES or NO.

Late Payment Policy	A free form text field to enter the Late Payment policy and procedures, such as, the Late Fee amount and the date it is charged. Example - $15.00 flat Late Fee charge on the 15th of each month
Screening/Orientation Policy	A free form text field to enter a new purchaser screening and orientation policy, if any. This can be a further explanation of the Right of First Refusal above, it the community has that right in its organizing documents.
Architectural Approval Policy	If a homeowner wants to make a change to the exterior of their home, what is the procedure they must follow in order to get approval on this change. This is a free form text field to enter this policy.
Leasing Policy	If a homeowner wants to lease their home to a renter, what is the policy of the community on this matter. For example, the Board of Directors might want a copy of the lease, also, they might want a provision in the lease making the renters subject to the community's rules and regulations. This is a free form text field to enter this information.
Violation Policy	A free form text field to enter the procedures that are followed for a violation of the community's policies and procedures, such as, an architectural change violation or a parking violation.
	Click the **Save** button to save your changes.

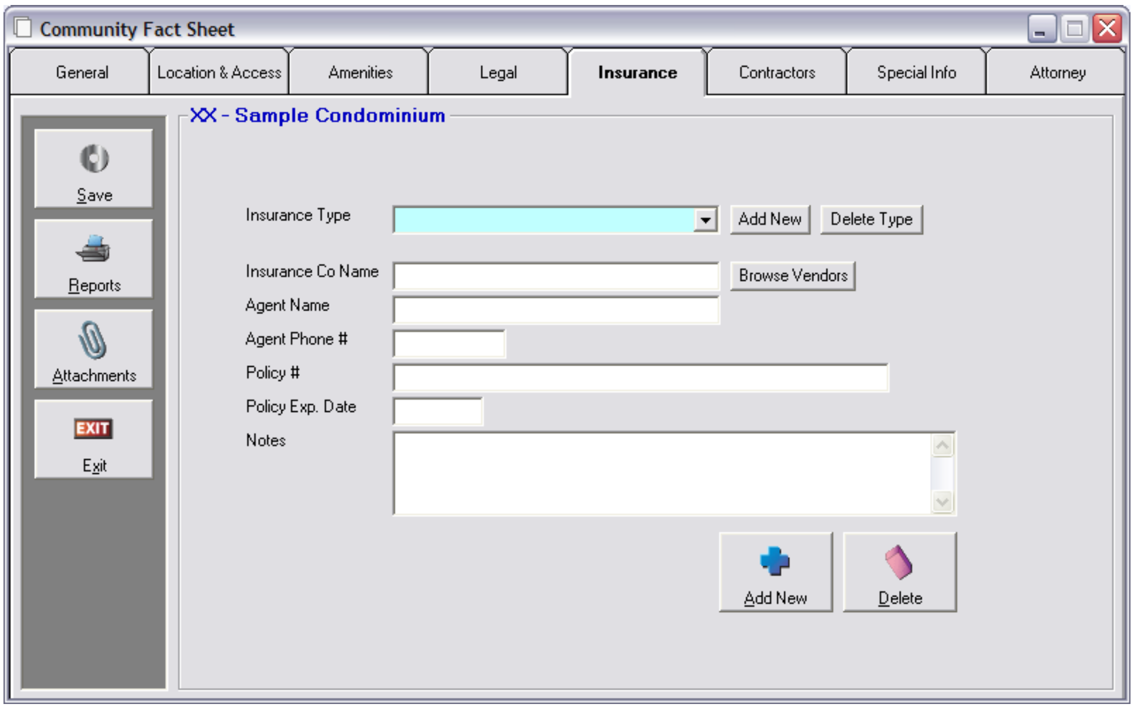
Insurance

Enter all of the insurance policy information for each type of insurance carried by the community. You can define the insurance policy types, the select the insurance company from the Vendor file or enter them manually.

Through the Insurance screen you can enter all the insurance policies that are carried by the community for the protection of the community.

You will see a blank Insurance screen where you can select an insurance policy that has already been entered or setup new insurance policies.

Insurance

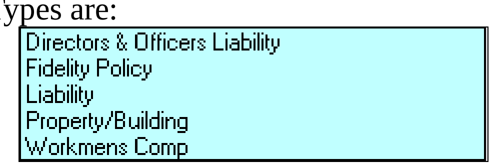


We'll discuss how to use this screen to setup and maintain the community's insurance policies.

Click the **Add New** button to add a new Insurance Policy. This will position the cursor at the Insurance Type field.

Insurance Type

When adding a new insurance policy, the place to start is to either make sure the **Insurance Type** exists, or, if not, add the **Insurance Type**. There are predefined Insurance Types provided for you to use already. Before defining a new Insurance Type, use the down browse arrow  to check the existing Insurance Types. The predefined Insurance Types are:



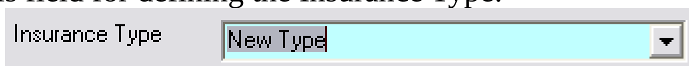
Select one of these Insurance Types or add a new one as described below.

If you clicked the large Add New button above, you are positioned on the Insurance Type field ready to enter a new type.

- or -

To add a new Insurance Type, click the **Add New** button next to the Insurance Type field.

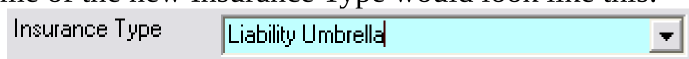
You will see this field for defining the Insurance Type:



Type over the temporary name of “New Type” with the name of this kind of insurance policy. Examples would be:

- Liability Umbrella
- All Risk Property
- Performance Bond

Entering the name of the new Insurance Type would look like this:



Simply press the TAB key to record this Insurance Type and continue.

Add Policy Info

Complete the Insurance Company fields or use the Browse Vendor button 

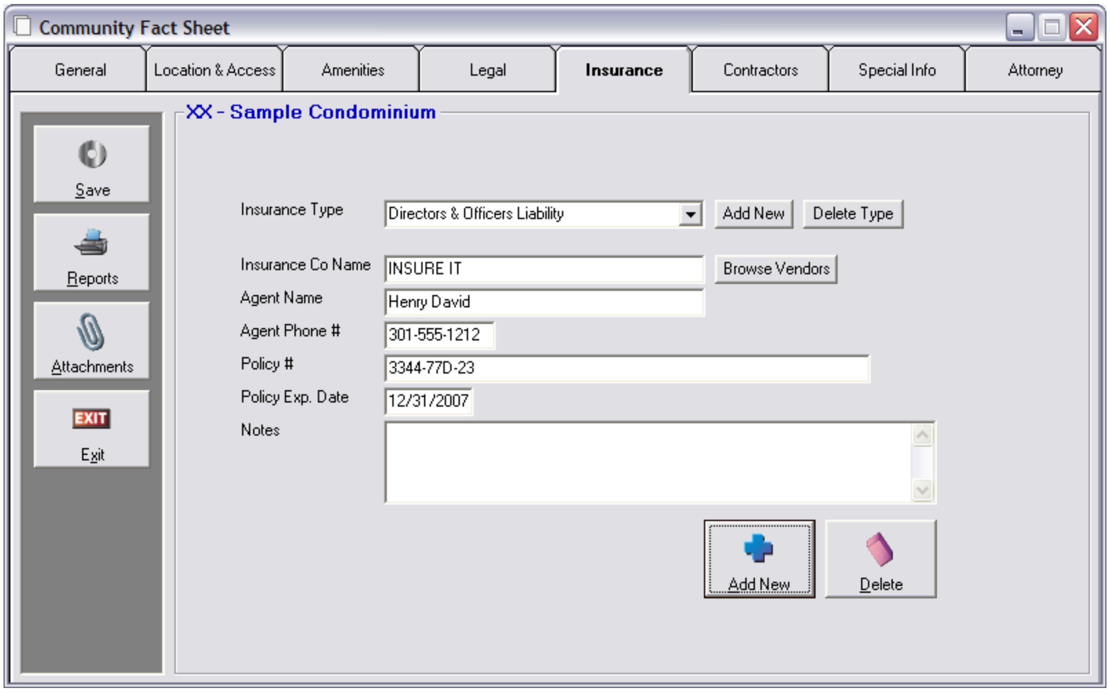
to select the Insurance Company from the Vendor File, since, after all, the Insurance Company has to be paid for the Insurance Policy so the company should be in the Vendor File.

Complete these fields for a new Insurance Policy:

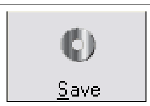
Insurance Company Name	The name of the **Insurance Company** who provides this insurance coverage to the Community.
Agent Name	The **Name** of the Insurance Agent or contact for this insurance policy.
Agent Phone #	The **Phone #** for the Insurance Agent or contact for this insurance policy.
Policy #	The **Policy #** for this insurance policy. Recording the Policy # here will help you if you must contact the Insurance Company.
Policy Expiration Date	The Expiration Date for this Insurance Policy. Recoding the Expiration Date here will help you monitor when the policy expires without having to find the actual policy in your files.
Notes	A free form text field to enter **Notes** or other information about this insurance policy.

A completed Insurance screen would look like this:

Insurance



Click on any of the fields to change or correct information.

	Click the **Save** button to save your changes.

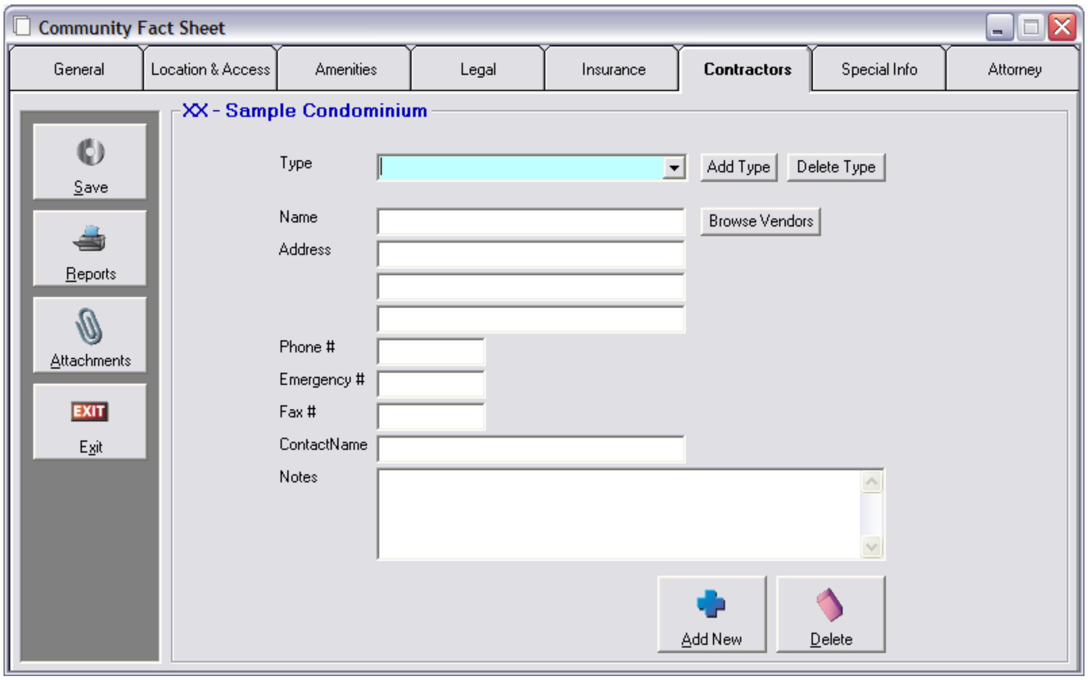
Contractors

A place to capture who the current contractors are for the community such as, the lawn maintenance company, electrician, plumber, snow removal company, etc. You can define the Contractor types that apply to your community, then select the company from the Vendor file or enter them manually.

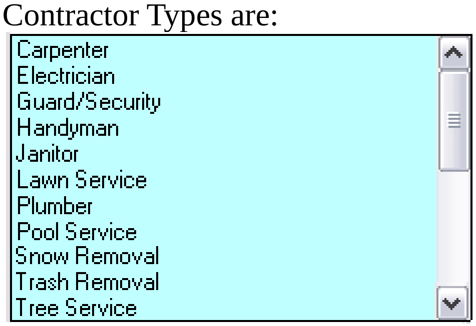
Click the Contractors tab view the screen where the community's Contractors are stored.

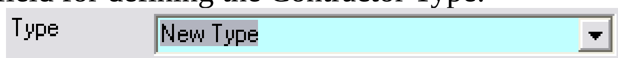
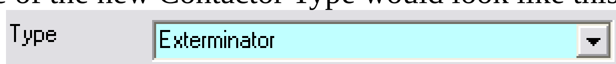
You will see a blank Contractor screen where you can select a Contractor that has already been entered or setup a new Contractor.

Contractors



We'll discuss how to use this screen to setup and maintain the community's Contractors.

	Click the **Add New** button to add a new Contractor. This will position the cursor at the **Type** field.
Type	When adding a new Contractor, the place to start is to either make sure the **Contractor Type** exists, or, if not, add the **Contractor Type**. There are predefined Contractor Types provided for you to use already. Before defining a new Contractor Type, use the down browse arrow  to check the existing Contractor Types. The predefined Contractor Types are: 

	Select one of these Contractor Types or add a new one as described below.
	If you clicked the large Add New button above, you are positioned on the Contractor Type field ready to enter a new type. - or - To add a new Contractor Type, click the **Add Type** button next to the Type field. You will see this field for defining the Contractor Type:  Type over the temporary name of "New Type" with the description of this kind of Contractor. Examples would be: • Exterminator • Painter • Roofer Entering the name of the new Contactor Type would look like this:  Simply press the TAB key to record this Contractor Type and continue.

Add Contractor Info

Complete the Contractor fields or use the Browse Vendor button 

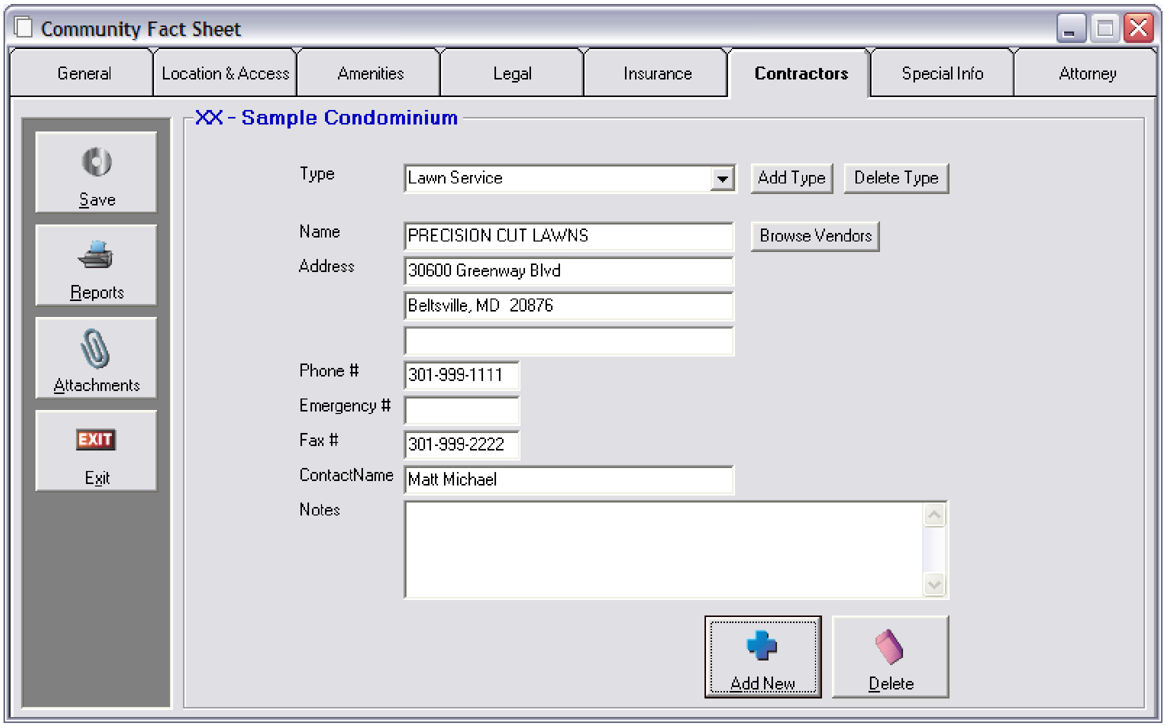
to select the Contractor from the Vendor File, since, after all, the Contractor has to be paid by the community so the company should be in the Vendor File. If you select the Contractor from the Vendor File, it will complete many of the fields on the screen for you.

Complete these fields for a new Contractor:

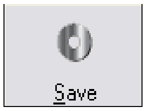
Name	The Contractor company or individual's **Name**.
Address	The **Mailing Address** for this Contractor. There are several lines to enter the complete mailing address for this Contractor.
Phone #	The main **Phone #** for this Contractor.
Emergency #	An after-hours or **Emergency** phone # for this Contractor.
Fax #	The **Fax #** for this Contractor.
Contact Name	A **Contact Name** for this Contractor.
Notes	Enter free form **Notes** about this Contractor.

A completed Contractors screen would look like this:

Contractors



Click on any of the fields to change or correct information.



Click the **Save** button to save your changes.

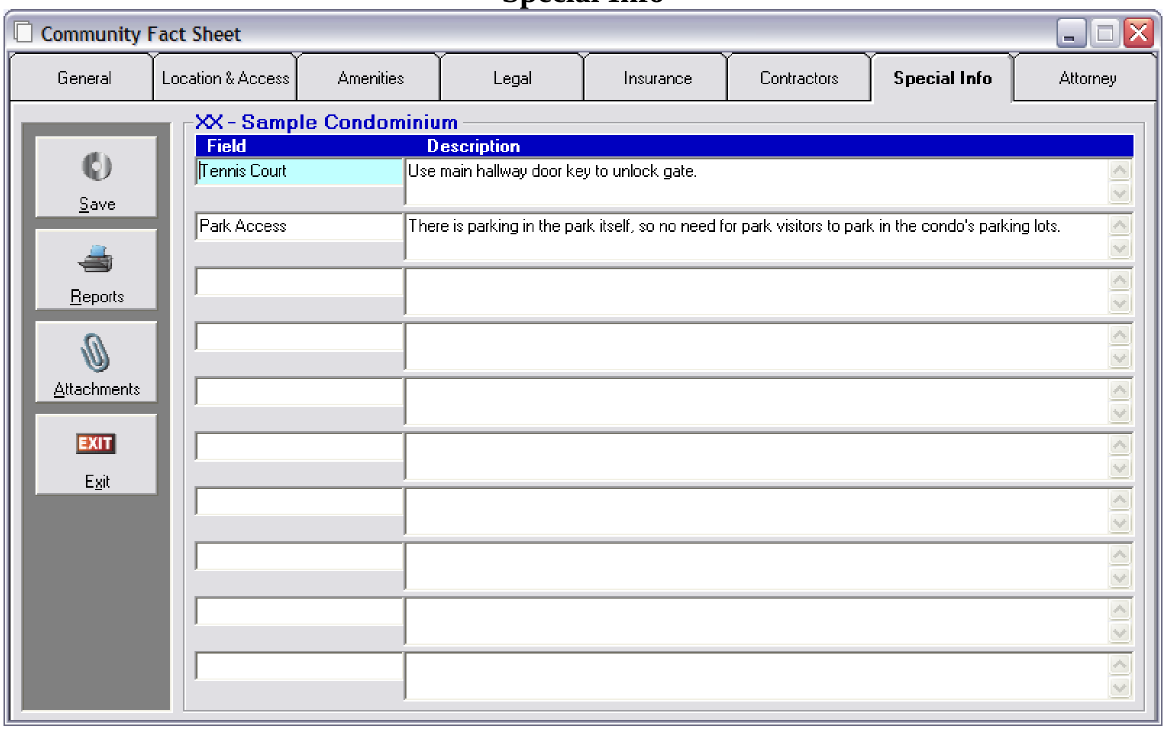
Special Info

Information about the community that you wish to keep track of. There are a number of blank fields you can label, the enter custom information into the data fields.

Click the **Special Info** tab to defined information or view/change the Special Info already entered.

You will see the Special Info screen with up to 10 free form text fields to define and track any community information you wish.

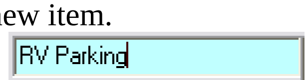
Special Info



We'll discuss how to use this screen to setup and maintain Special Info about the community.

Field

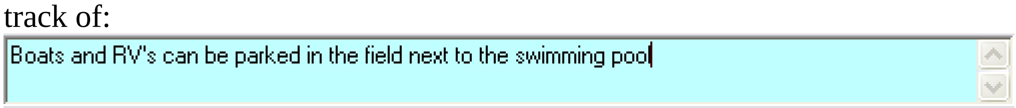
In this column you can name the Special Info you wish to track. Simply click on the first blank field to add a new item.



Type in the **Field** label. Press the TAB key to save the Field label and move to the Description field.

Description

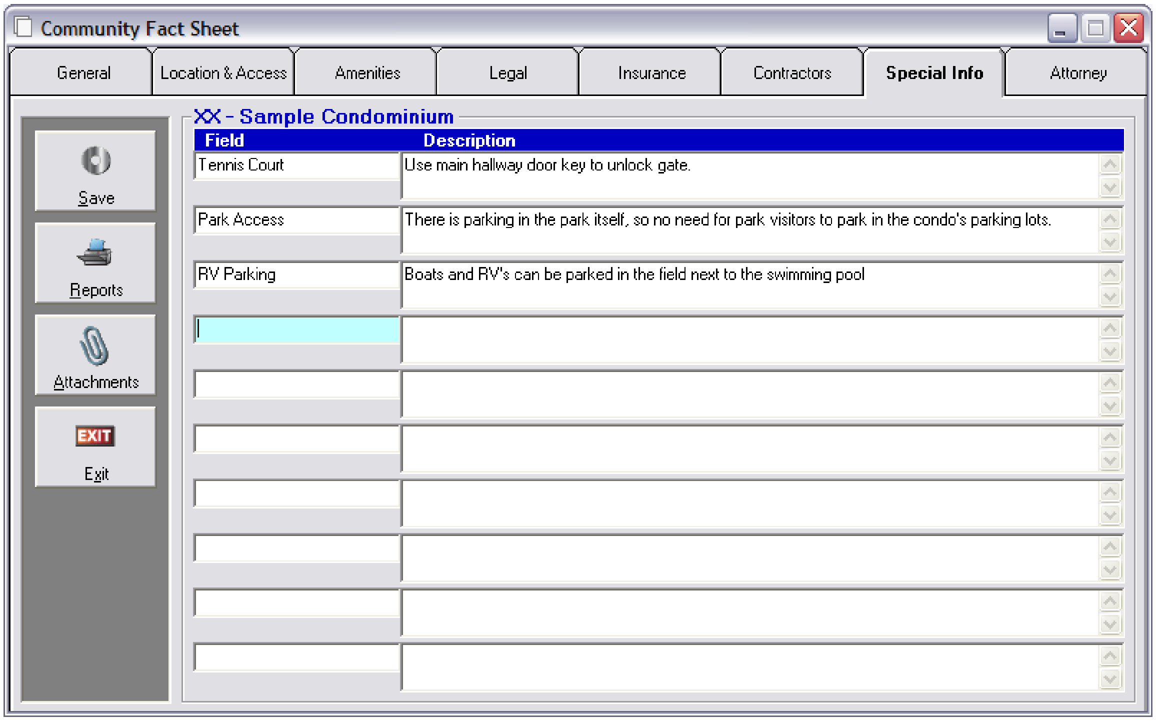
Enter free form text which describes or explains the Special Info you wish to keep track of:



Press the TAB key to save the **Description**.

A completed Special Info screen would look like this:

Special Info



Click on any of the fields to change or correct information.

Click the **Save** button to save your changes.

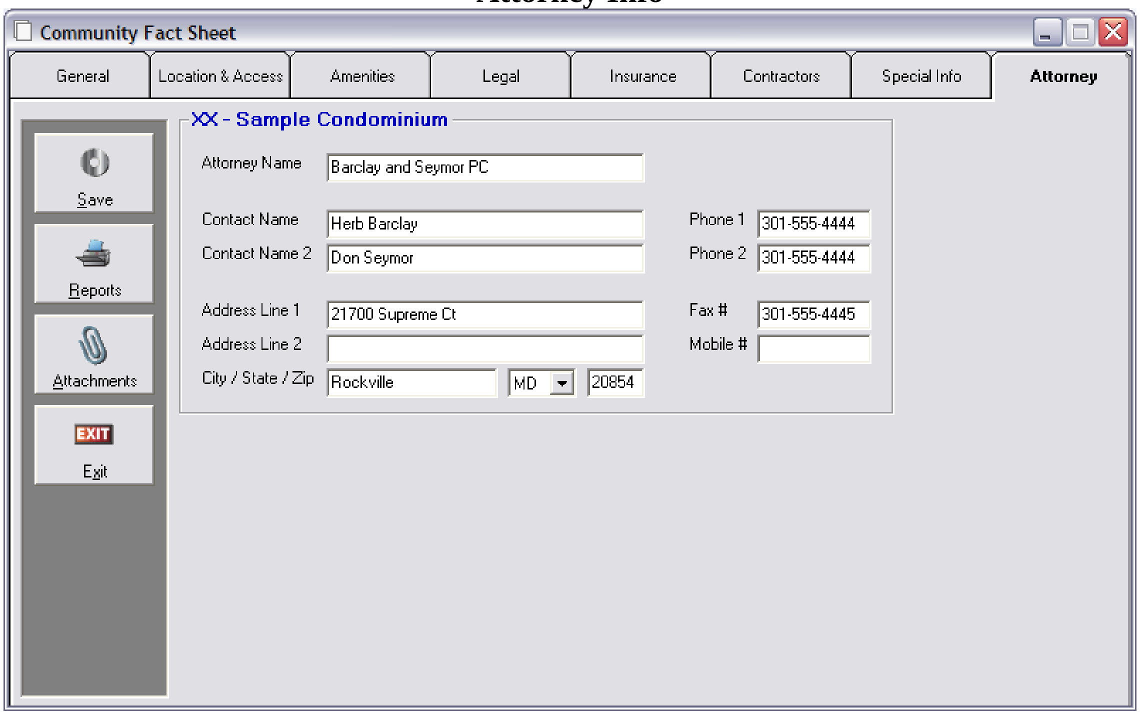
Attorney

The law firm this community uses for legal opinions, legal issues, and collections and compliance actions.

Click the **Attorney** tab to setup or view/change the Attorney info for the community.

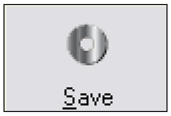
You will see the Attorney screen for keeping track of the Attorney for the community.

Attorney Info



We'll discuss each field on this screen so you know how to complete it.

Attorney Name	Enter the **Attorney** or law firm name.
Contact Name	The name or the community's attorney or the person who is the main contact at the law firm.
Contact Name 2	A place to store a second attorney or person's name who is an alternate contact at the law firm.
Phone 1	The main **Phone #** for the Attorney or law firm.
Phone 2	A secondary **Phone #** for the Attorney or law firm.
Address Line 1	The first line of the Attorney's or law firm's mailing address.
Address Line 2	A second line for the mailing address, if needed.
City/State/Zip	Enter the City, State and Zip Code to complete the mailing address for the Attorney or law firm.
Fax #	The **Fax #** for the Attorney or law firm.
Mobile #	Enter a **Mobile Phone #** here, if known.

	Click the **Save** button to save your changes.

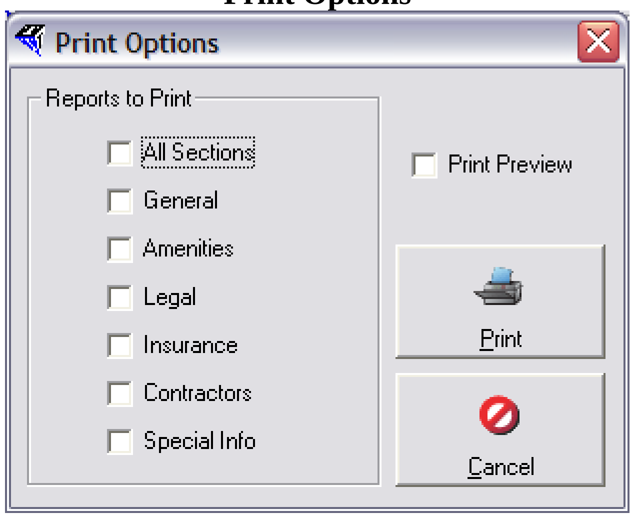
Reports

You can print a report with ALL the Community Fact Sheet info or print a report for just selected pages. This can be handy for updating binders you store in the office containing the Community Fact Sheet info.

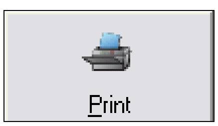
Click the **Reports** button to print the Community Fact Sheet info.

You will see the Print Options for the Community Fact Sheet:

Print Options



You can print selected pages. Click to checkmark which Community Fact Sheet pages you wish to print. Click the "All Sections" option to print all the pages at once.



Click the **Print** button to proceed with the report printing.

Click the **Cancel** button to exit without print the report.

Attachments

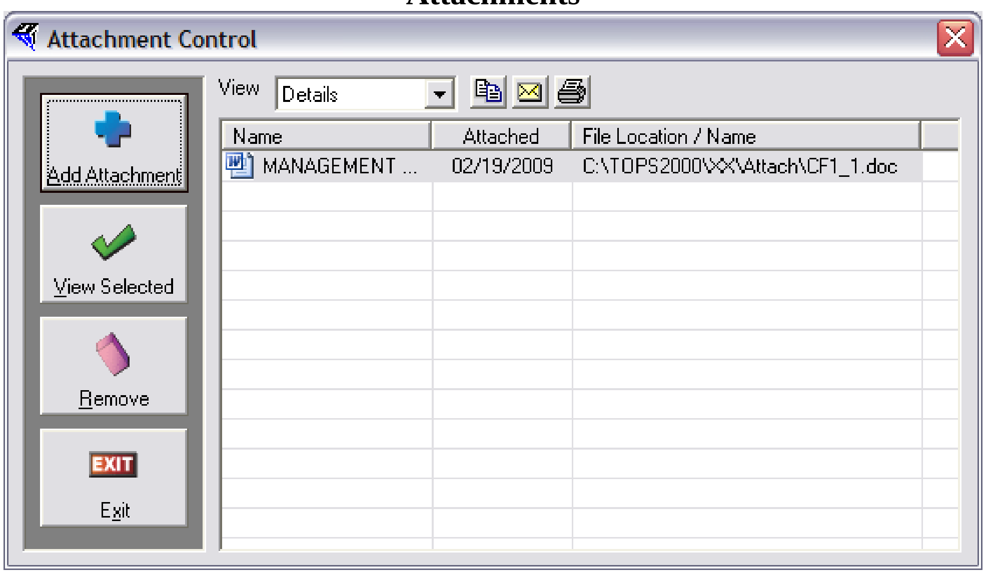
Attachments can be pictures, files, Word® documents, or any type of digitized data. For example, you might wish to store a complete set of the community's organizing documents, such as the Declaration or Covenants, Conditions, and Restrictions along with the Bylaws. That way, they are stored in a centralized location that is available to anyone in the management office.

While you see the **Attachment** button on the left side of the screen on all the pages of the Community Fact Sheet, no matter what page you are on, the Attachments are stored in the same location on your computer. They are just available to view or add on any of the Community Fact Sheet pages.

Click the **Attachments** button to see any attachments or to attach a new digitized item.

You will see the **Attachments** screen for the Community Fact Sheet:

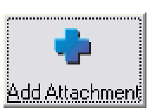
Attachments



It shows any existing Attachments with the following information:

- **Name** – The Name the Attachment is stored as.
- **Attached** – The Date the Attachment was stored in the Community Fact Sheet.
- **File Location/Name** – The drive letter and folder path where the Attachment is physically stored.

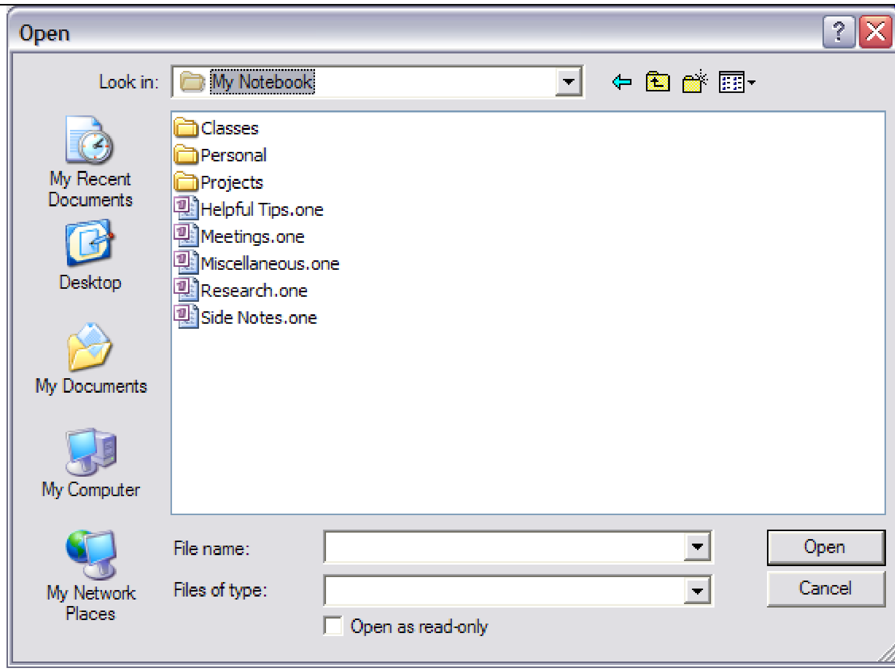
Notice there are buttons down the left side of the screen. We'll review the steps for working with **Attachments**.



Click the **Add Attachments** button to add a new Attachment to the community.

You will see a Windows® file browse screen open so you can select the file you wish to attach.

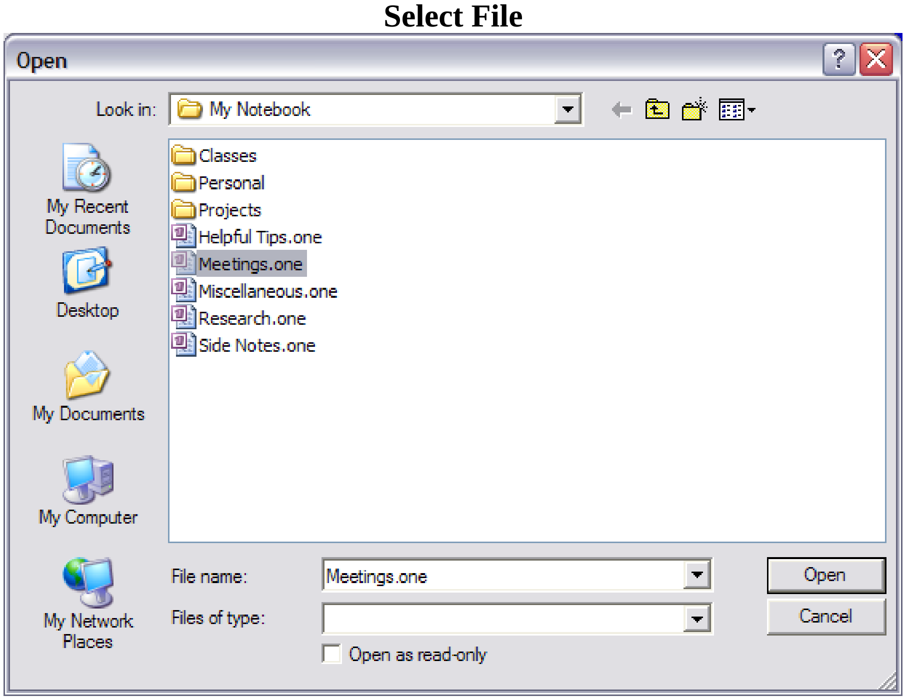
File Browse



Navigate using the standard Windows® file browsing options shown above to locate the file you wish to attach.

Click to highlight the file you wish to attach:

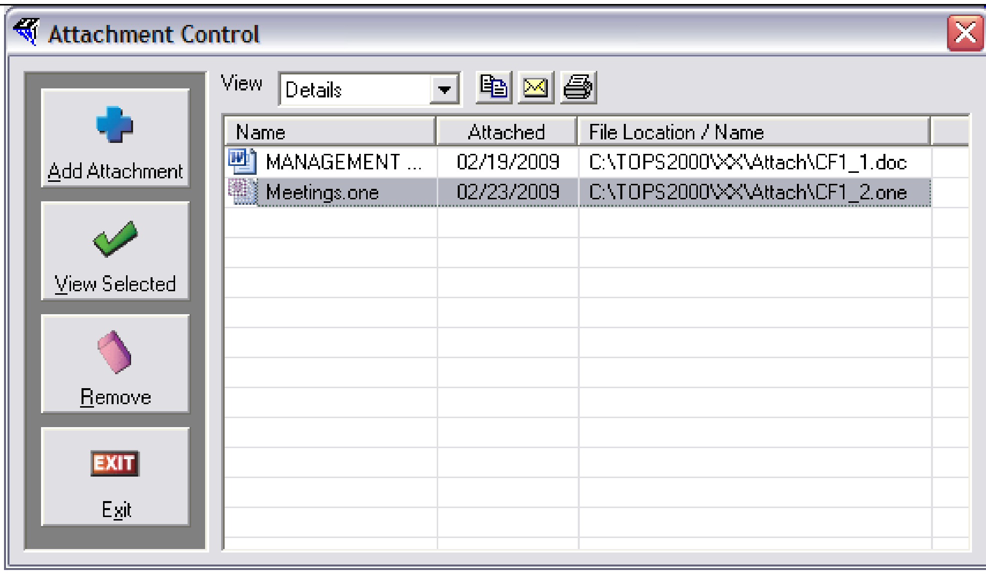
Select File



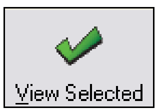
Double click to select the file.

You will then see the file you selected added as an Attachment to this community:

New Attachment



The **Attachment** is automatically saved in this community. You may click the **Exit** button to go back to the Community Fact Sheet.

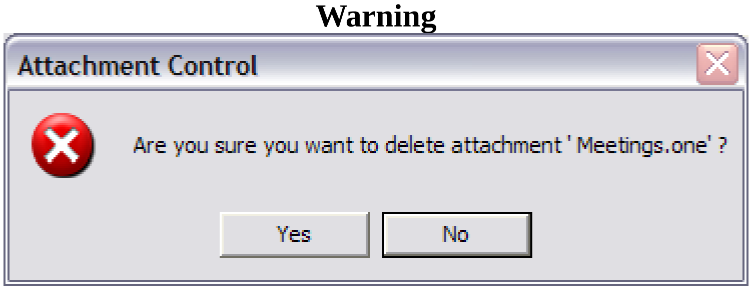


Highlight an Attachment, then either double click it or click on the **View Selected** button to open the Attachment so you can view it.

To remove an Attachment, simply click to highlight it, then click the **Remove** button.

You will see this warning before the Attachment is removed:

Warning



The default answer is NO to prevent accidentally deleting of the selected file. Click on the YES button to delete the file.

This completes the manual section on the Community Fact Sheet.