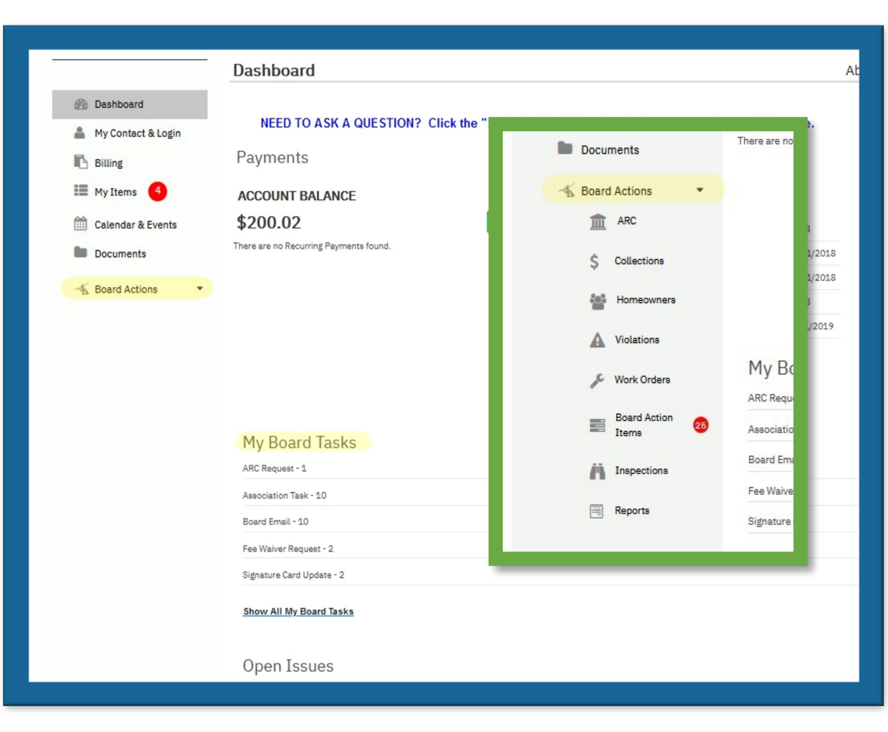
BOARD ACTION ITEMS

How to navigate and what to do with Board Action Items



Board Dashboard

Log onto the owner portal online at: https://portal.nrpartnersllc.com (See How to Log onto Portal for instructions on how to register).

Upon login, you will be directed to the Dashboard - the primary home page for the owner portal.

To view the Board Action Items click *Board Actions* from the left-hand navigation panel to open the drop -down menu. At any point you can navigate back to the Dashboard by clicking *Dashboard* on the navigation panel.

What if I don't have all of those options? You may not have all the same "Board Actions" if you are only an ARC Committee member, if your community does not participate in annual inspections, if your Homeowner listing is disabled, or if Reports are disabled.

Board Action Items

The types of action items visible to the Board of Directors are:

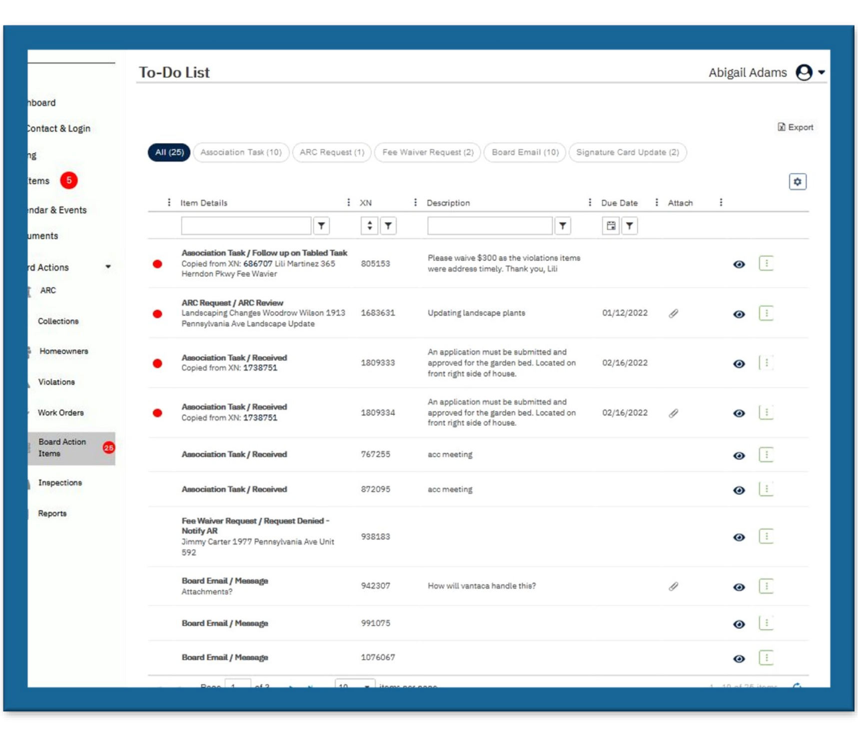
- ARC Requests
- Association Tasks*
- Audits*
- Board Email*
- Fee Waiver Requests*
- FHA*
- Liens*
- SCC*
- Signature Card Update*
- Tax Return*
- Violations
- Work Orders

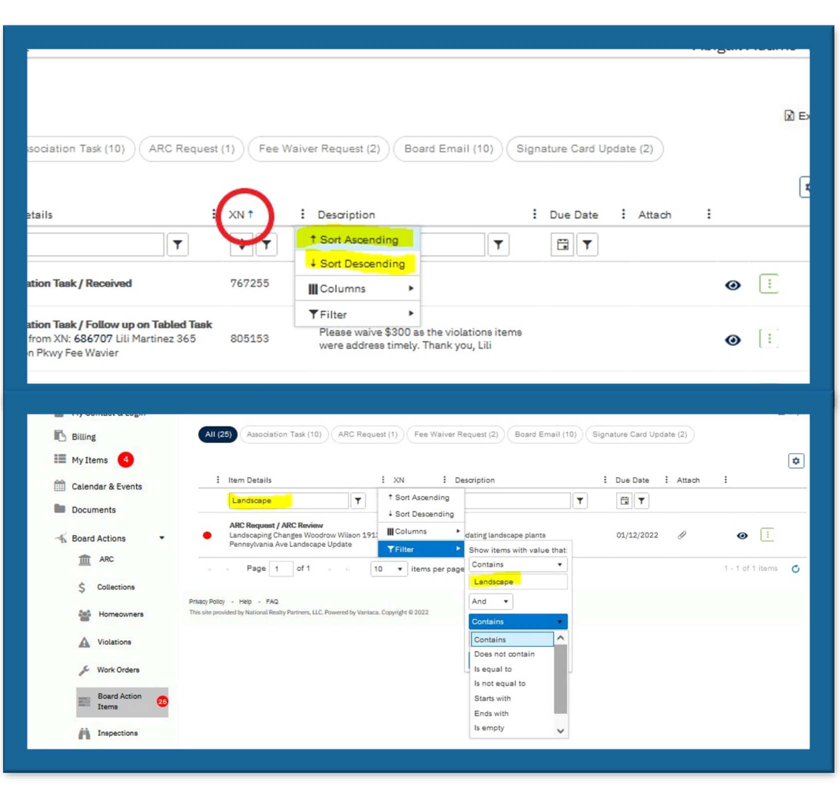
You may not see all action items listed above at a given time. Some action items may be open, and in a step not visible to the Board.

If you have open action items, you can sort by category by clicking the action item type at the top of the screen.

To see additional details about an action item, click the eye icon to be navigated to the details page.

*Asterisk indicates action items only visible on the Board Action Items page





Sorting & Searching

Sorting: Your columns can be sorted numerically or alphabetically. The columns can be sorted ascending (smallest-to-largest, A-to-Z) or descending (largest-to-smallest, Z-to-A).

To sort a column, click the column header, or click on the column's corresponding three vertical dots to open the column menu. You can verify a column's sort by confirming the blue arrow at the top of the column.

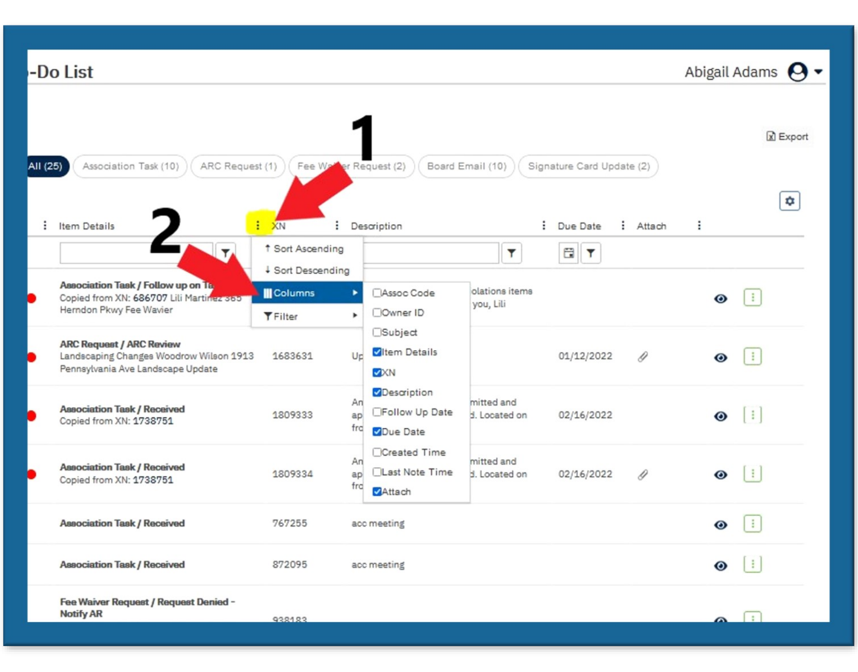
Searching: To search within a column, you can type in the text box at the top of the column. You may notice, when text is in the search box it also populates in the 'Filter' section of the column menu (accessible by clicking the three vertical dots). In the 'Filter' section you can modify the criteria for the search.

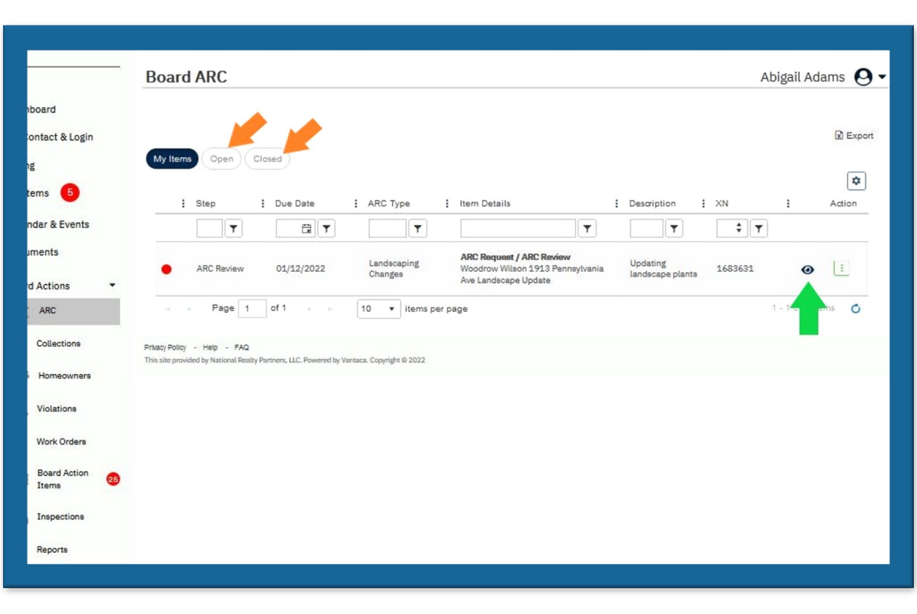
Change Visible Columns

On many of the Board Action Item pages you can change the visible columns on the page. To do so:

1. Click on the three vertical dots on the column header
2. Hover your cursor over "Columns" on the drop-down menu
3. Check or uncheck the columns you want visible on your view. Please note, you may need to scroll left and right to view all available columns on a single page as the viewing pane does not expand.

If you are satisfied with your column view, click the gear icon on the right upper-right corner. Here you can save your view, revert your view to your previously saved preference, or revert your view to the system default.





ARC Requests
(part 1)

Upon navigating to the ARC Requests page automatically all pending requests in the step *ARC Review* will populate as *My Items*. The step of ARC Review is designated for the Board of Directors (or ARC Committee) to review and come to a decision.

To view all open ARC Requests click *Open* and to view all closed ARC Requests, action items click Closed (see orange arrows).

To see additional details about an action item, click the eye icon to be navigated to the details page (see green arrow).

ARC Requests
(part 2)

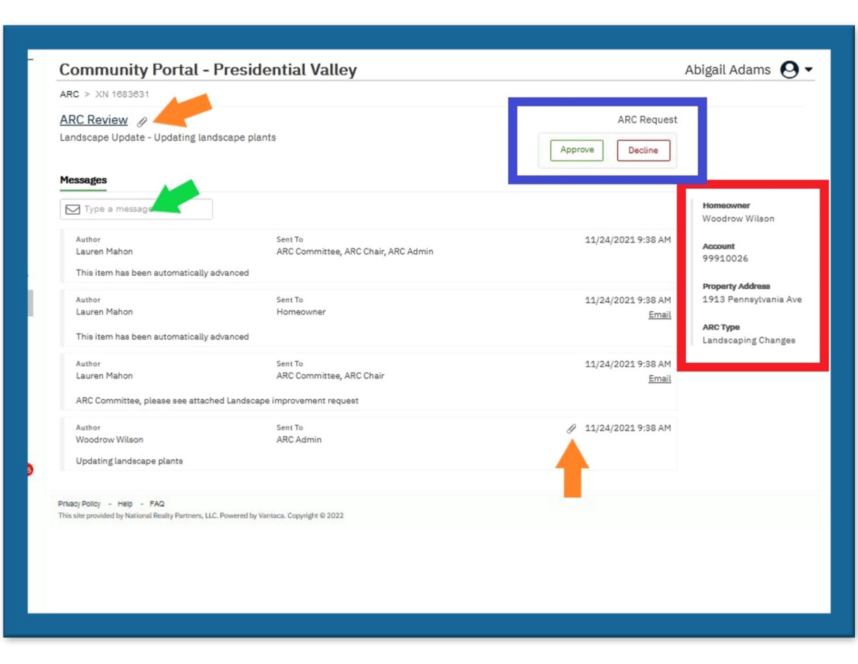
Clicking on the eye icon opens the individual action item detail page. Here you can view correspondence between management, the homeowner, and the committee.

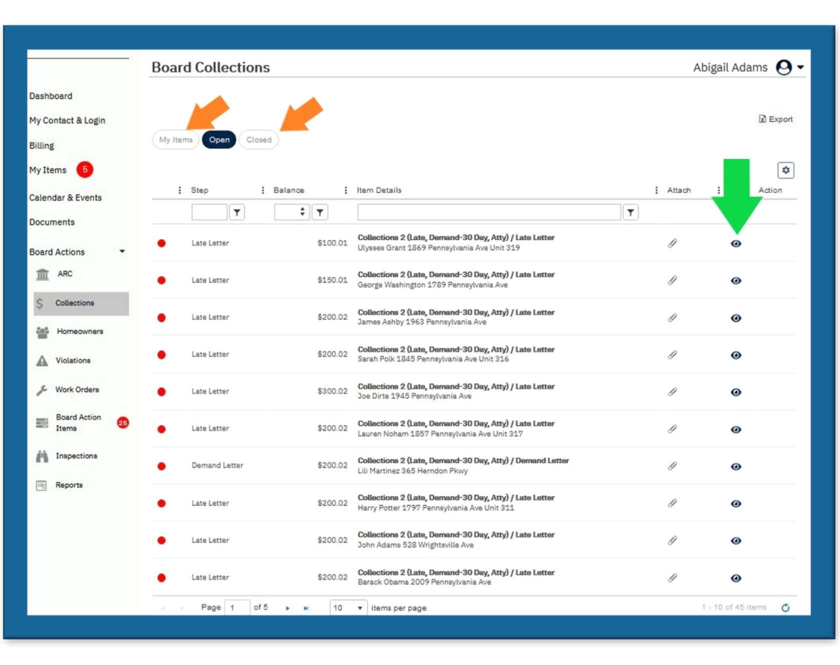
To see details about the homeowner's account, see the details in the red box.

To open an attachment, click the paperclip icon (see orange arrow). Attachments are opened in a separate window. To toggle between open attachments click *Prev* or *Next*, or use the drop-down menu.

To reply to management or the committee, click 'Type a Message' to open the reply box (see green arrow).

The blue box surrounds the Approve and Deny decision buttons. **Do not click Approve or Deny unless you are the approved representative**. If you are unsure who the assigned representative is speak directly with your community manager.





Collections
(part 1)

Upon navigating to the Collections page automatically all delinquent owners will populate as *Open*. There are several steps to the delinquency/legal action process that are outlined by your association's governing documents.

To view all open accounts in the step of Board Review click *My Items.* To view all closed late fee action items click *Closed* (see orange arrows).

To see additional details about an action item, click the eye icon to be navigated to the details page (see green arrow).

Collections
(part 2)

Clicking on the eye icon opens the individual action item detail page. Here you can view correspondence between management, the homeowner, and the committee.

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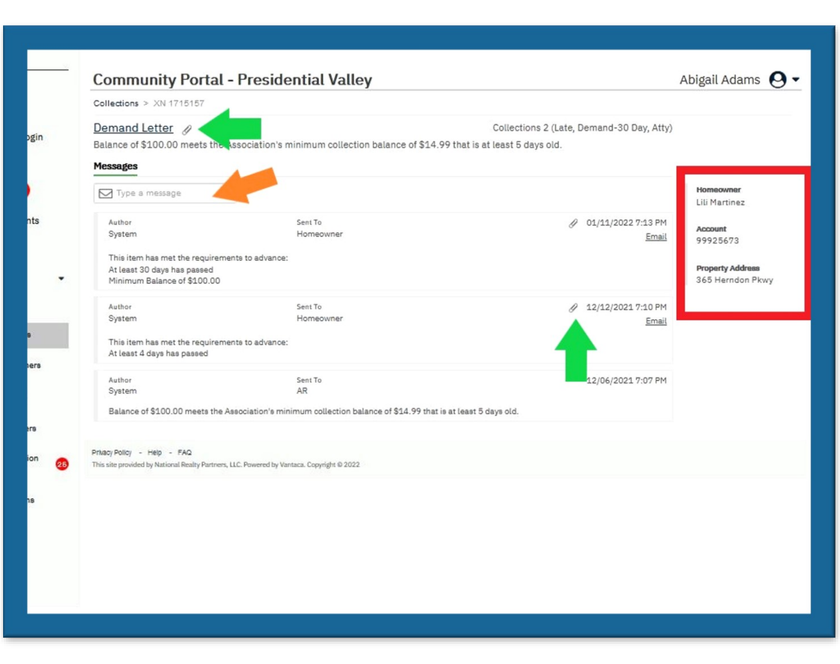
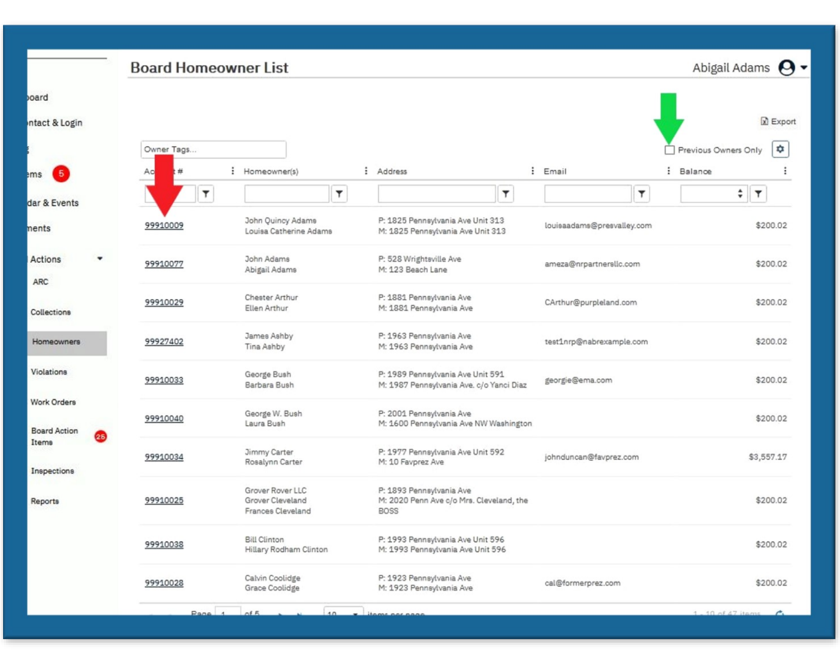




Homeowners
(part 1)

The Homeowner page provides a view of current and former homeowners in the community. To view previous homeowners click the *Previous Owners Only* checkbox (see green arrow).

This information is privileged and should never be shared or utilized for personal reasons.

To view account details such as open/closed action items click the underlined account number (see red arrow).

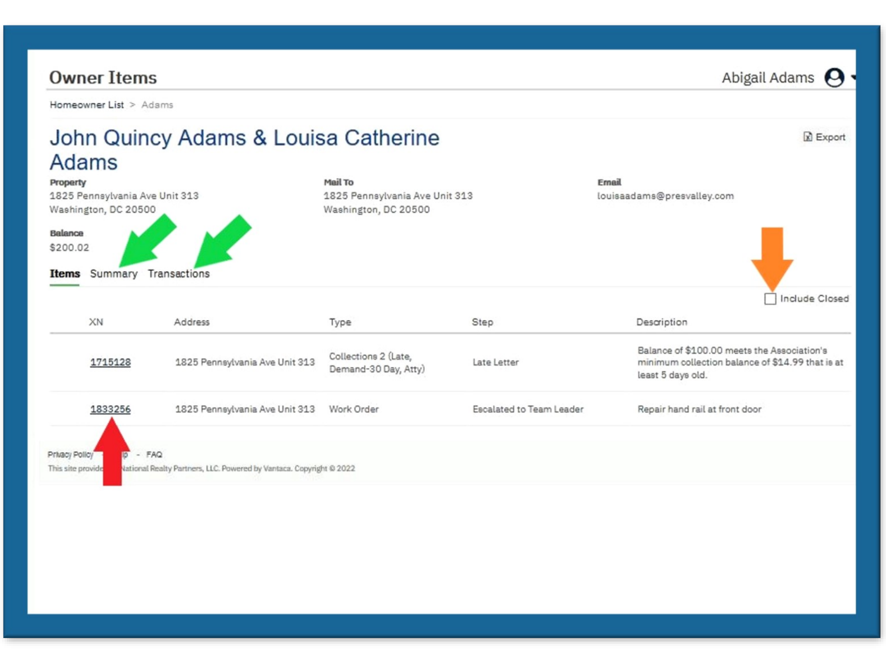
Homeowners
(part 2)

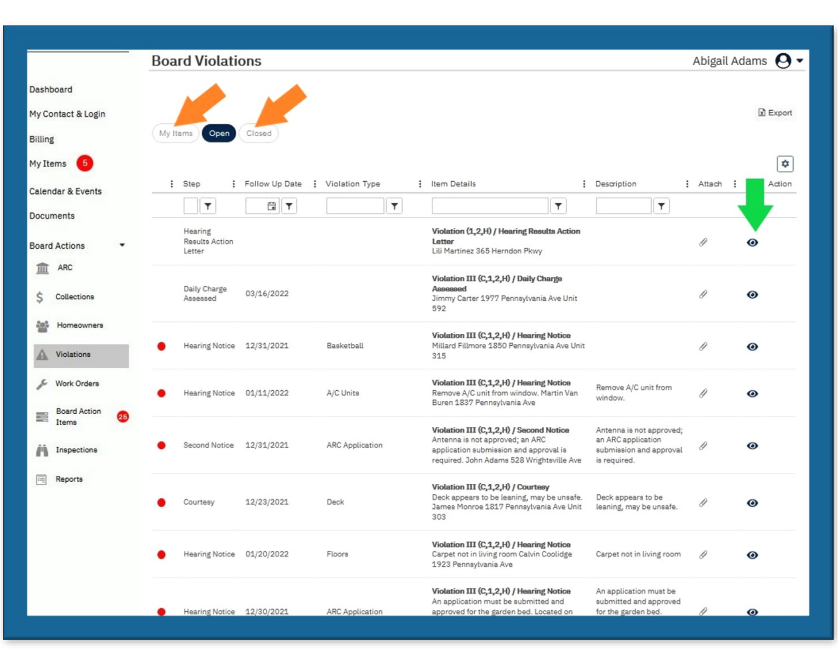
Opening the Homeowner detail page give access to open and closed action items and transaction history.

To view closed action items, click the *Include Closed* checkbox (see orange arrow).

To see details about and open or closed action item, click the underlined XN number (see red arrow).

To view the transaction history, click *Summary* or *Transactions* beneath the homeowner detail. *Summary* separates the charges by type, *Transactions* shows all charges and payments through the life of the account (see green arrows).





Violations
(part 1)

Upon navigating to the Violations page all open violations will populate as *Open*. There are several steps to the violation process that are outlined by your association's governing documents.

To view all open accounts in the step of Board Review click *My Items.* To view all closed late fee action items click *Closed* (see orange arrows).

To see additional details about an action item, click the eye icon to be navigated to the details page (see green arrow).

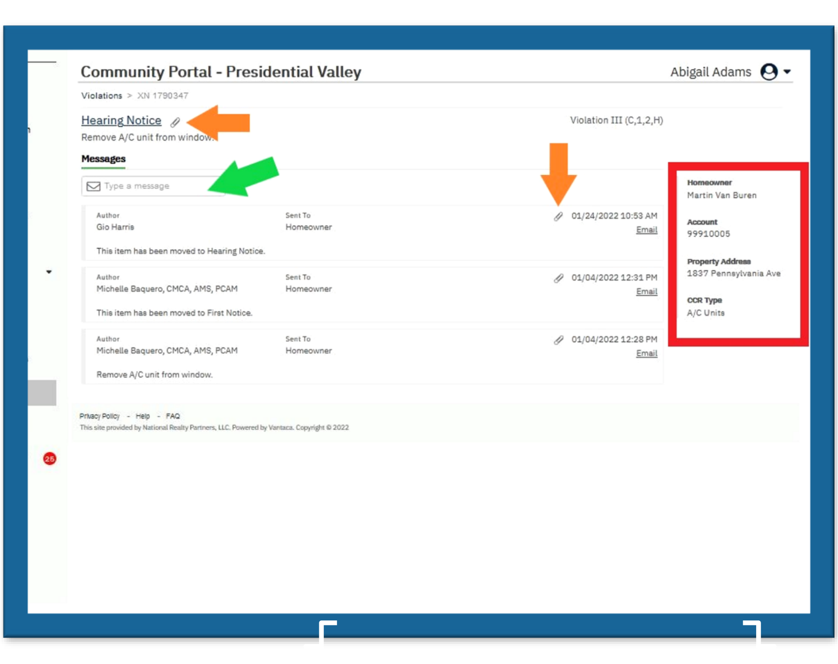
Violations
(part 2)

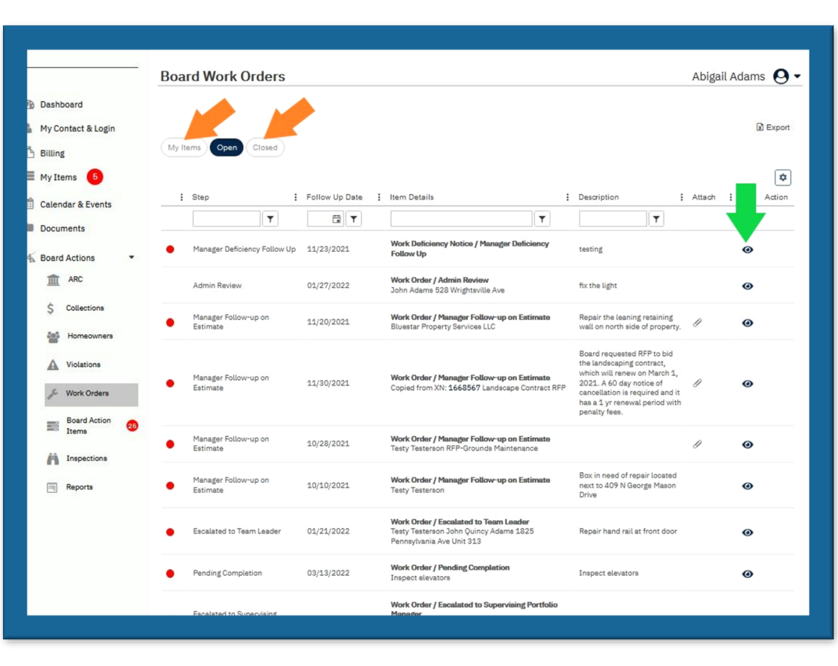
Clicking on the eye icon opens the individual action item detail page. Here you can view correspondence between management and the homeowner

To see details about the homeowner's account, see the details in the red box.

To open an attachment, click the paperclip icon (see orange arrow). Attachments are opened in a separate window. To toggle between open attachments click *Prev* or *Next*, or use the drop-down menu.

To reply to management, click 'Type a Message' to open the reply box (see green arrow).





Work Orders
(part 1)

Upon navigating to the Work Orders page automatically all open work orders will populate as *Open*.

To view all open work orders in the step of Board Review click *My Items*. To view all closed work orders click *Closed* (see orange arrows).

To see additional details about an action item, click the eye icon to be navigated to the details page (see green arrow).

Work Orders
(part 2)

Clicking on the eye icon opens the individual action item detail page. Here you can view correspondence between management, the homeowner, and the committee.

To see details about the homeowner's account, see the details in the red box.

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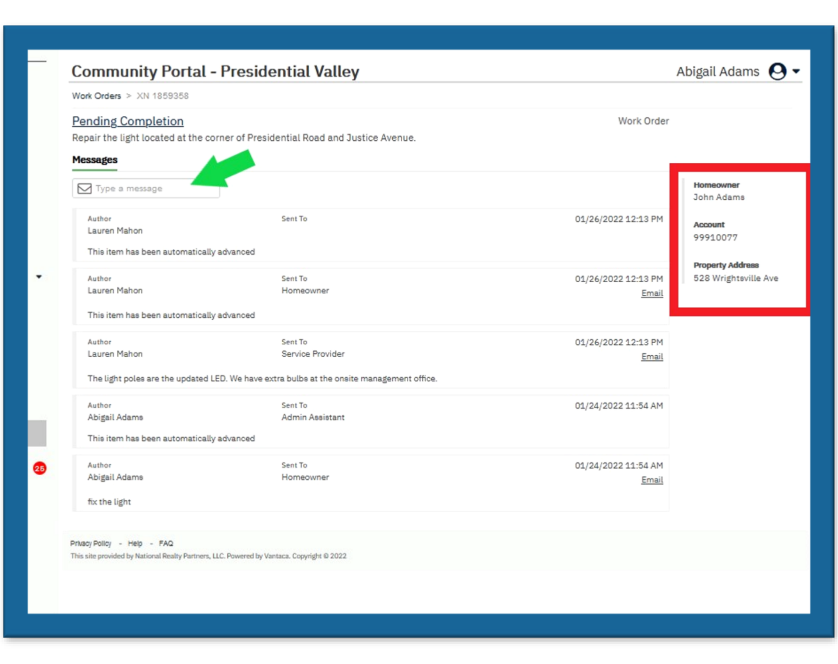

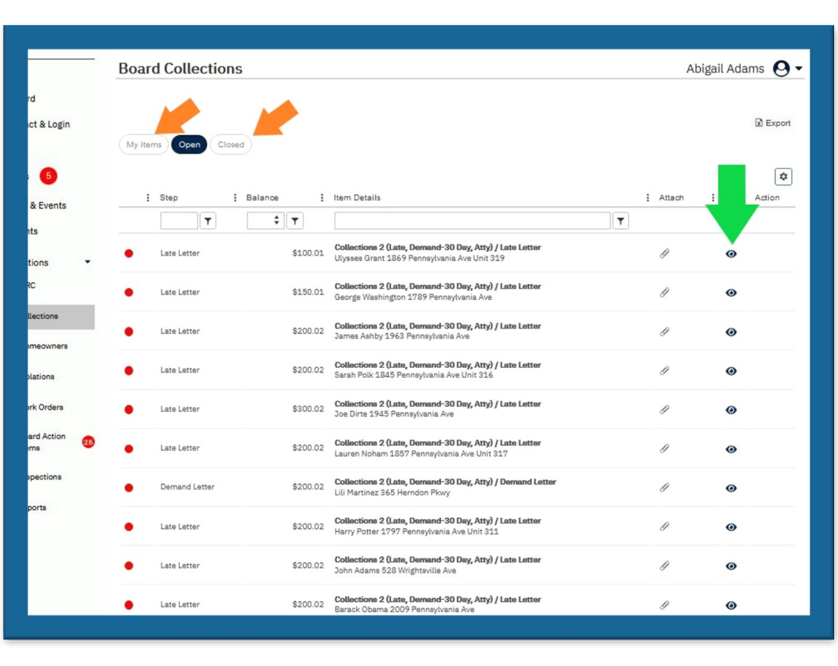

Inspections
(part 1)

Upon navigating to the Collections page automatically all delinquent owners will populate as *Open*. There are several steps to the delinquency/legal action process that are outlined by your association's governing documents.

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Inspections
(part 2)

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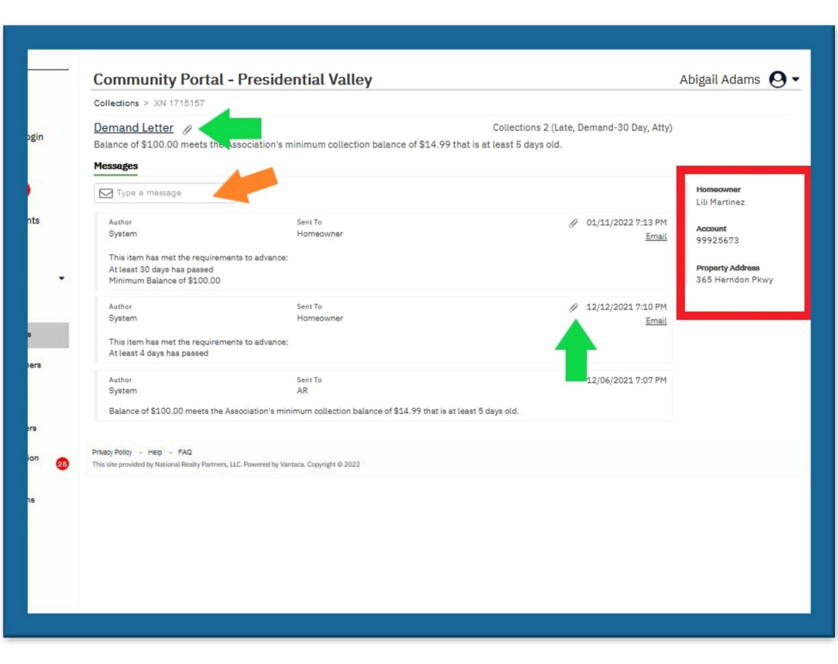

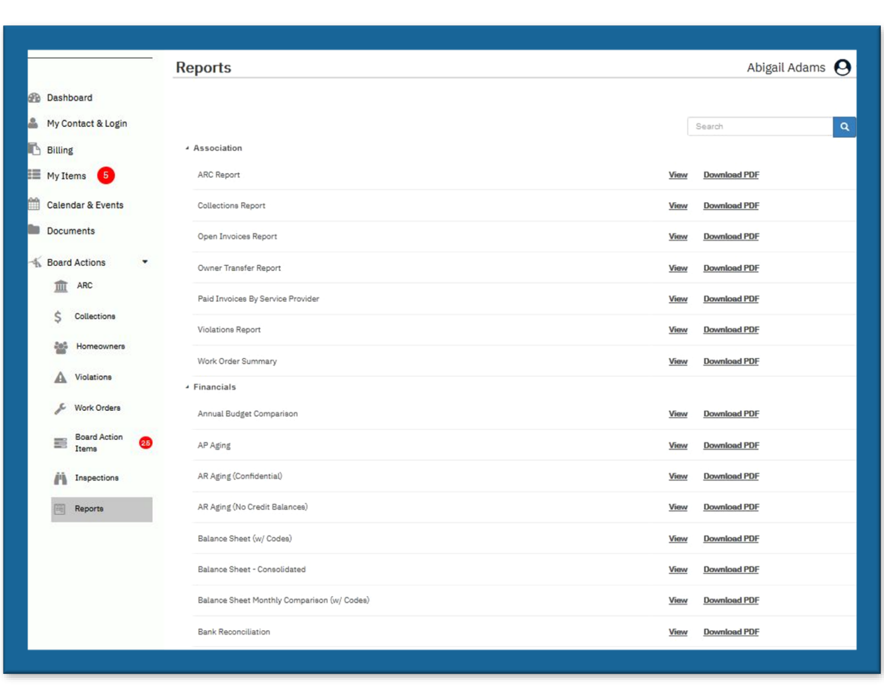

Reports
(part 1)

Many reports are readily available for Board members to review.

To view all a report on a web page, click *View.*

To download a report as a PDF, click *Download PDF.*