



So, who does what?! Use this quick resource to determine who can help.

COMMUNITY CARE

1. **Homeowner** Calls, Emails, Fax, Mail, Walk-Ins, Appointments
 - a. General Correspondence
 - i. Find answer, help requestor, and note account.
 - b. Work Orders
 - i. Follow instructions in Additional Info.
 - ii. Use Vantaca to send work order and dispatch vendor.
 - iii. Follow-up with requestor and vendor.
 - c. Violation Correspondence
 - i. When a Homeowner reports a violation, follow instructions in Additional Info.
 - d. Architectural Correspondence
 - i. Screen for correct information.
 - ii. Enter submittals in Vantaca.
 - iii. Contact Manager and/or Committee, depending on instructions in Additional Info.
 - e. Late Fee Disputes/Fine Disputes/Payment Plan Requests
 - i. Must be submitted by Owner in writing.
 - ii. Create Fee Waiver or Payment Plan XN.
 - f. Other Correspondence/Tickets
 - i. Research Vantaca; respond to Homeowner.
 - ii. Note account, attach correspondence, etc.
 - g. Insurance Compliance
 - i. Enter vendor packet information into Vantaca.
 - ii. Update insurance expiration dates based on documentation provided.
 - iii. Send expiration emails to vendors with notice of expired coverage.
 - h. Front Desk at each Office: Colorado Springs, Inverness, Loveland
 - i. Reservation management for Association amenities
 - i. Follow instructions in Additional Info.
 - j. Key/Fob management for Associations
 - i. Follow instructions in Additional Info.
 - k. Parking Permits
 - i. Follow instructions in Additional Info.
 - l. Returned mail (Inverness Front Desk only)
 - i. Receive from Business Center.
 - ii. Scan and post to the Homeowner's account.
 - m. Condo Questionnaires & Document Orders
 - i. Process all orders on HomeWiseDocs.com.
 - ii. Manage missing and expired documents
 - n. Follow-up on afterhours calls from the answering service.
 - o. Community Care Supervisors resolve escalations before going to CAM/DOCA.
2. Special Projects, as needed
 - a. See a member of CSS if you have a need for a special project.



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COMMUNITY ASSOCIATION MANAGERS

1. **Board Member** Calls, Emails, Faxes, Mail, Walk-Ins, Appointments
 - a. Board Meetings & Annual Meetings
 - i. All prep work, including notification of members, agenda, meeting room reservation, Management report, Board packet, etc.
 - ii. Add meeting information to Additional Info and the Association Calendar
 - iii. Minutes
 1. After approved, create an Uploads request in Vantaca.
 - b. Complete action items from the Board
2. Update/Maintain Additional Info so that Community Care can answer Homeowner requests, questions, inquiries, and more (complete this monthly).
3. Update/Maintain Association Services to ensure all work orders are being sent to the appropriate vendor for the Association and Service Type
4. Review and respond to action items stepped to the Community Manager
5. Facilitate escalations and questions from Homeowners that need Board approval
6. Obtain required documentation to have new service providers approved and set up in Vantaca
7. Manage bids and awards for Association projects
8. Work with Hammersmith Construction Services & Hammersmith Roofing
9. Assist with needed information for condo questionnaire orders
10. Budget creation and input in Vantaca after approved
11. Review Financials
12. Review and approval of invoices
13. Site inspections
 - a. Work Orders
 - i. Use Vantaca to send work order and dispatch vendor.
 - ii. Ensure Additional Info is updated.
 - b. Violations
 - i. Use Vantaca to send violation.
 - ii. Close violations when necessary.
 - iii. Ensure Additional Info is updated.
 - c. Architecturals
 - i. Use Vantaca to enter information and/or facilitate vote.
 - ii. Ensure Additional Info is updated.
14. Ensure Association documents are up-to-date in Vantaca and at HomeWiseDocs
 - i. Answer requests for missing documents.
 - ii. Create Uploads requests in Vantaca.
15. Send email communications to Community via Vantaca (Broadcast Emails)
16. Emergency planning and training
17. Manage staff, if applicable, and utilize Just In Time, if applicable
18. Review Reserve Study
19. Order newsletter(s)
20. Ensure website is up-do-date, if applicable
21. Invite Lifestyle Services to present to your Association
22. Board Member & Committee Member Updates
 - a. Update Vantaca immediately when Board Members and Committees change.



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HAMMERSMITH®

HOA PROJECT MANAGER

1. Declaration of Registered Agent and Address for Associations
2. Associations' Annual Reports with the State of Colorado
3. DORA registration for Associations
4. Broadband Planning point of contact
5. Veritas Waste point of contact
6. Offboarding Associations
7. Board Orientation scheduling
8. Website billing
9. CAI memberships
10. AAMC® renewal
11. Management of 23 Inverness Way East