The *Assistant Manager's* Guide to Everything You Need to Know

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Welcome to this wild and crazy adventure! Whether you are completely new to the industry or you have had experience working for another company, use this guide to help you learn your new position within the Maxus family!

Contents

Your Role as an Assistant Manager

Congratulations on deciding to take on this challenging and rewarding position within our company. As an Assistant Manager you have to wear many hats, typically all at the same time. One moment you may be helping to lease an apartment, the next you may be helping your manager with a report, or talking with your maintenance supervisor about the latest move out and overcoming a scheduling conflict. The important thing to remember is that organization is your best friend.

But first… what does it really mean to be an Assistant Property Manager?

Job Description

- To assist with the day-to-day activities of the property and the needs of the Property Manager. As an Assistant you are the liaison between the tenants and leasing staff to the PM. All issues and requests should first go through you before being brought to the attention of the PM.

Duties and Responsibilities

- Assist in training other staff members under the direction of the property manager
- Market and lease ready units under the direction of the property manager and maintain the required closing ratio percentage determined by your Property Manager and Regional Manager.
- Assist in making deposits, reporting delinquents, collecting rent, and renewing leases under the direction of the property manager.
- Assist in account procedures
- Assist the property manager with resident activities
- Act as property manager in the absence of the property manager
- Abide by all Fair Housing regulations

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REQUIRED PROPERTY TRAINING

Before we jump in to this workbook, I suggest that you have completed all of your required training courses (when applicable). If you are new to property management this will give you a good foundation of fair housing laws, how to properly tour a prospective resident, as well as how to navigate through OneSite.

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A Day in the Life…

  As I have already mentioned, an Assistant Manager will always be juggling dozens of different hats at once, so each day is never exactly the same. But there are some items that regularly need attended to. I will go in to full detail on these subjects farther down the road but this will give you a good idea of what an average day is like. *These are suggested duties. Your Property Manager will assign your specific duties.*

Daily Tasks

1. Approve and go over pricing with your manager
2. Forward the date
3. Post scheduled billing (as needed)
4. Run and post checks and money orders
5. Collect and work delinquency
6. Close and review final accounts
7. Assist with leasing the property
8. Support your leasing consultant on any tasks they have
9. Assist your manager with any tasks they have
10. Work renewals and enter them in to OneSite as they are finished
11. Follow-up with prospects
12. Work any pending applications
13. Handle and address any resident issues that may arise, before presenting these issues to your manager
14. Communicate with the maintenance staff regarding any issues or updates they have regarding work orders and make ready's.
15. Walk move outs for charges under the supervision of your manager

No matter how prepared you or are how well you plan out your day… never expect it to go the way you planned! An exciting part of this job is that it is never boring.

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OneSite Today Page

The great thing about OneSite is that you can customize your today page to have the modules that are most important and helpful to you right where you want them to be.

- To customize your today page, on the top right click on "customize."
- This will bring up a pop-up where you can select different modules from the drop down on the left.
- Feel free to customize your today page in a way that works best for you. Try different ones out and find out what you like.
- These are the modules that I find helpful for my daily life:
  - Alerts & Approvals
  - Tasks
  - Leasing Summary
  - Appointments
  - Waitlist
  - Documents awaiting signature
  - Renewals
  - Renters Insurance
  - New Policy Enrollments

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The Leasing Continues

As an Assistant Manager you are still responsible for touring prospective residents as well as completing follow-up in a timely manner. This is a shared responsibility you will have with your leasing consultant.

- Utilize the "tasks" tab on your OneSite home page. Use OneSite to schedule all the follow-up that you need to do, whether it is to remember to contact a prospect about an available apartment or to call a resident about a question that they had. That way everything will hit your today page!
- In order to see all of your active prospects, go to the prospect tab, on the drop down menu select "all active," then click on "leasing consultant." You can then scroll through to find everyone you have reached out to as well as any that may still be assigned to the house.
- Work follow-up daily. Call prospects within 24 hours after tour. Call or email again within 48 hours.
- The goal is to follow up with a prospect a minimum of five to seven times. Make sure to input all conversations within the activity log.
- Remember never use any descriptors that could be considered a violation of fair housing!
- **<u>Make sure that all prospects are being entered in to OneSite</u>**, whether it is a phone call through your office or a walk-in. It doesn't matter if they don't end up leasing. We need accurate numbers of everyone that ask about the property.
- Make sure to get as much information as possible from a prospective resident! You don't want to lose a possible qualified lead from improper documentation!
- Ultimately make sure that you treat every prospect the same!!

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Pricing

Pricing is very different depending on what type of property you work at. Some are on pricing optimizers, market pricing, LIHTC and/or AHDP programs.

Pricing Optimizers

- If you are using Yieldstar Pricing Optimizer, then pricing must be approved daily. It is best if this is done by 9:30 a.m. in order for quick response and approval time.
- Pricing does not need to be approved on weekends. Friday's rates will carry over to Saturday and Sunday (if your office is open)
- Your property website must also be updated every day with the current pricing. This needs to be done as soon as the pricing is approved for the day.

Market Pricing

- Market pricing can change based on supply and demand as well as a result of the pricing of your comps.
- This would be a decision that is made by your property manager as well as regional.
- Pricing typically does not change as often or as dramatically.
- Typically, there is a set pricing for different sized apartment homes. Location or specific upgrades in the unit could warrant an upcharge to the rent.

Tax Credit and AHDP

- Pricing is determined by set aside requirements and per bedroom size and published annually by HUD. The Maxus corporate compliance department distributes updates to your maximum rent limits.
- For residents with housing vouchers, the resident's rent responsibility is based on documented income and other factors. This is determined by the local public housing authority as to what portion the voucher will pay and what portion the resident is responsible to pay. All LIHTC and AHDP properties are required to accept housing vouchers "IF" the applicant passes our required screening criteria. There are acceptations if a housing voucher is not enough to pay current asking rents, so please check with your regional manager and Maxus corporate compliance department for specific rules governing our LIHTC and AHDP properties.

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Forward the Date

This can be done by either you or your property manager. Typically your leasing consultant will not have access to this function. Before the date is forwarded you must check with everyone that all checks have been ran that need to, all notices have been entered, and any other paperwork has been finished. Once you forward the date you cannot move back!

- Forward the date every week day by 10 a.m.
- To do this click on the date on the top of the home page of OneSite, and follow the prompts.
- At this point OneSite will ask you to move accounts out, move accounts in, close bank deposits, etc. (if not already completed).
- If you had to manually enter a check, cashier's check, or credit card, <u>always print out to the bank deposit detail report from this screen.</u>
- Remember: keep a reminder for what day month end is for each month. Do not forward the date past it until your manager has completed month end. The good thing is that OneSite will notify you when it's time.

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Advertising

It is a team effort to make sure that all of your advertising is up to date. The great thing is that many third-party websites are integrated with OneSite or updated by a third party! It is recommended that you check all of your advertising sites (For Rent, Apartment Guide, property website, etc.) at least once a week to ensure accuracy.

- Weekly check apartmentratings.com and with the guidance of your manager respond to both positive and negative comments.
- If your property has a Facebook account, you need to create a post three (3) times per week. It can be an interesting story, events going on in the nearby area, activities on property, or a delicious recipe!
- Some properties work better with more of a grassroots campaign. Make up a flyer with your pricing or specials and deliver it to local businesses.
- Invest in bandit signs if your property is in a great location that gets a lot of drive-by traffic
- Set up a preferred employer program and work to help bring in a new influx of prospective residents.

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Helpful Reports to Run

These are interesting reports in OneSite you can run to learn more information on the leasing trends at your community, occupancy, and much, much, more!

- **All Units:** Will show you a list of all of the head of households, apartment numbers, and lease terms for your entire property.
- **Availability:** The easiest way to pull this report is by move out/skip date. This will show you your oldest vacant apartment, as well as organize your move ins to make it easier for the make ready board.
- **Boxscore:** can be run for information by week or by a specified date range. Will show you your make ready percentages, leases, denied applicants, NTV entered, move ins, move outs.
- **Changed Transactions:** This will show any changes that were made to charges or reversal of charges to any account.
- **Delinquency Report:** You can sort by current residents, applicants, previous residents to determine who still owes money.
- **Leasing Activity Detail:** Again, you can pull this information by week or a specified date range. Will show you all of the traffic that has come in and will itemize by each consultant. You can see your closing percentage and other interesting facts!
- **Lease Expiration Renewal Detail:** You can start the date from any point and it will list who all renewed, went MTM, and gave notice in a particular month. This is a good way to help keep track of your renewals for bonuses.
- **Market Source Traffic Report:** This shows you a breakdown of what was listed as the advertising source for all of the tours that were entered in to OneSite for a specific date range. As long as they were entered accurately, this will give you a great idea of what is getting your name out to your prospects.
- **Projected Occupancy:** this will show you the current trends for occupancy at your property if you don't lease any more apartments and no one gives notice to move out.
- **Resident Activity:** this one is so versatile! You can pull all kinds of information like move-ins, NTV, renewals signed and pull it by time frame!

There are dozens of different reports you can run that show interesting facts and data regarding your community. Don't be afraid to run reports to see what happens. You never know when you may stumble upon something useful!

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Notices

There are a several different notice templates that can be found in OneSite to make your life much, much, easier!

- Click on "Docs" on the main OneSite page, "Forms Library," "Resident" to access them
- You can then edit the notices if you would like. I would always save a backup of the original just in case you need them in the future.
- You can also create your own customizable letter if you have something that goes out fairly regularly, like the pest control notice. You would do so by "add new form" on the main page of the forms library. You can file it to the different categories: leases, other, renewals, residents, based on what it is.
- To utilize the notices whether for late rent or lease violations, go to the residents account through "find person," click on "letters & notices," "new letter," select the letter you want to use from the drop down menu, type in any notes you want to put (i.e. sent notice about noise issue), and then "queue letter." You can also send the letter via email directly from that popup.
- The letter will then appear on the list so you can access it at any time!
- You can also generate notices in bulk. Go to the "Administration" tab, "other," "letters and notices." You can then click on any notice you want, select the residents who will receive it, and make all of your notices at once! So easy!

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Money, Money, Money!

As an Assistant Manager, your main priority is handling all things related to money at your property. It is always suggested that only one person is put in charge of money so that it limits the room for errors.

- Remember cash is not accepted for any reason, for anything!
- No partial payments are to be accepted.

How to Post Payments

- Post all rent payments as they are received in your office.
- Checks/money orders can either be entered individually through the resident's ledger or through the bulk function. No matter which way it's done, the process is the same.
  - *Individually:* "find person," enter their information, "click on ledger," "enter payment," select "scan check." A new tab will then pop up. Enter the check quantity, and check total amount. Click "start check scan." The check scanner will then scan the check. Check that all of the information is correct (account, check number, amount). Click "upload." Exit out of the account and go back in to see that the check was ran successfully. A record of this transaction will also show in bulk processing under the payments tab.
  - *Bulk:* click "payments" on the main OneSite screen. Under "bulk processing," click "new." A new tab will then pop up. Enter the check quantity, and check total amount. Click "start check scan." The check scanner will then scan the check. Check that all of the information is correct (account, check number, amount). Click "upload." It will not let you complete the bulk function unless all of the checks match what you manually entered at the top.
    - Once completed you can check on the status of the checks from the "bulk processing page." If all of the checks have been processed correctly there will be a green check mark on the status.
    - If there is a yellow caution symbol it means that the payments are still processing. This can happen if you run a large amount at once.

> > ▪ If there is a red stop sign it means that a check was not scanned correctly. When this happens, please refer to the FAQ section of www.maxus123 > Payments or reach out to a member of the OneSite team at Corporate Office.

How to Manually Enter a Payment

- Pull up the resident's ledger from their account
- Select "enter payment," "enter manual payment."
- Select the proper code: PMTCHECK, PMTMORD (money order)
- Enter the check amount, document number, the NAME of the person who made the payment, and any description that is needed.
- Close manual deposit by going to "Administration," "Frequent Accounting," "Bank Deposits," enter total amount of manual payments, select bank account and follow process. The total must match or the system will not allow you to close the deposit.
- Send the payment to Stuart Woody at Corporate Office to deposit the money at the bank.

Application Fees and Deposits – In office applicant that does not come through online leasing.

- Application fees should be run the day that the applicant is screened.
- Application fees are coded to APPFEE
- Admin fees and/or required unit deposits are not to be posted in OneSite until after they are approved for 72 hours.
- Administrative fees are coded to ADMIN
- Unit deposit are coded to DEPOSIT
- Additional deposits (pet, etc.). Enter charges separately in deposit ledger.
- <u>If there is a required security deposit included in the payment; always run the payment in to the resident ledger. Do not run it directly in to the deposit ledger.</u>
- For a deposit, open up the resident's ledger. On the line item of the payment that was entered, click "view," then on the popup "move to deposit ledger." Enter the amount that you want moved as a deposit.
  - o If you cannot move the entire amount that you need to, look to see if anything has been charged in their account (like an app fee). If the

deposit check was the first check ran the app fee will be taken from that deposit check. You can take the remaining balance from another payment. It is all going to the same place.

- You can view the deposit ledger by clicking on the dropdown menu to the right of the bolded "ledger" to see activity from the deposits side. Treat it as an escrow account.
    - If for some reason you have made an error and there is too much money in the deposit ledger, you can fix it! Go in to their deposit ledger, click on the line item, select "apply," and then you can enter the amount that needs to be moved back over to their resident ledger.

Delinquency

- Please refer to the particular resident's lease, your Manager, and Maxus123.com for delinquent requirements and procedures.
- Send late notices per your Manager's direction.
- Use the Delinquency Report in OneSite for detailed information

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NSF (non-sufficient funds)

An NSF is an accounting term meaning "non-sufficient funds." This occurs when a resident submits a payment when using a check.

- Any "bounced check" or payment that has been returned from a bank will appear on the homepage on OneSite under "alerts & approvals."
- The same day that you receive the alert that a payment has bounced, you must send out a letter to the door informing the resident immediately. I suggest also making a phone call too (check with your regional for correct procedure). The system is designed to automatically notify the resident of an NSF.
- The NSF fee is $_____. Late fees will still accrue until the new payment has been submitted.
- In cases of NSF, only certified funds will be accepted.
- If a resident has more than two NSF's OneSite will automatically update settings which will not allow you to accept payment from that resident in the form of check or ACH payment for online payments. They will need to make other arrangements for payment.

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Move In's

The great thing about completing move in's in OneSite is that while there are quite a few steps involved it is itemized out for you! However, different properties are set up with different move in requirements as required by their regional manager.

Traditional

- With traditional leases, you will need to generate the lease documents within the residents' docs tab.
- On the day of move-in, go to the resident's account, look under scheduled billing and make sure that everything has been charged up correctly (rent, any pet rent, etc). Once everything has been checked over select "move in."
- On the left-hand side there are two lists, one of "required tasks," one with "additional tasks." Each line item would need to have a check mark next to it indicating that each step has been complete before OneSite will allow you to move the applicant in.

Utilizing DocuSign Online Leasing and Online Renewals

To generate the lease in OneSite

- Pull up the residents account through "find person."

- Make sure that all charges are correct under "scheduled billing," on the dropdown menu click on "future" (if it is not visible). Make any changes that are needed.

  To sign the lease in person:

- Select "move in," "documents," click on "generate forms," click "refresh contents" until the document has been generated. Click "print view packet." Print out the packet and have the resident, you, and the property manager sign it.
- In order to close the packet, you have to follow these steps.
  - Click the box to the right of "actions" that highlights the box for all of the separate documents. Click on sign documents. "Click on OFSA signatures," then "sign."
  - The goal is to have green check marks in the "final" column.
  - Scan the signed lease documents into the packet using the PDF lease placeholder. Then give the physical documents to the residents as their copy. Please reference www.Maxus123.com > FAQ > Paperless for more detailed instructions.
  - You may then close the packet by clicking the blue "close packet" link at the top, next to Packet Status. Your packet should always say "Closed-Completed." If it doesn't say this – your packet is not closed properly.

  To sign the lease online:

- Click on "move in," "documents," click on "generate forms," click "refresh contents" until the document has been generated. Click on "sign documents," "DocuSign," and then "Send E-mail" to the Head Of Household. This will send the lease contract directly to all lease holders email.
- Once all lease holders have signed then your Property Manager would click on "sign documents" and "sign now."
- The goal is to have check marks in the "final" column.
- You may then close the packet, using the same instructions listed for OFSA packets.

To Move an applicant in to OneSite

- In the applicant's account, click on "move in." Before the system will allow you to move the resident in there needs to be a green check mark by all of the line items under "required tasks," "additional tasks" and "documents." Different properties may have different requirements here.
- You are able to enter the resident's payment for move in fees on this screen as well as doing it from the ledger.

Things to check upon move in
- Click "edit" by each leaseholder and occupant's name. Check to make sure that the "unit address" and "opt in for email notifications" is checked under contact information.
- Under "billing information" make sure that the billing address is "the unit address," and the "delivery options" are what the residents have decided on whether it's through the mail or through email.

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Move in Checklist and Bonus Form

Maxus awards bonuses to Leasing Consultants, Assistant Managers, and Managers who do their part to keep their property full.

- In general, the bonus will be earned by and paid to the person who shows the apartment first.
- For specifics, see Maxus123.com for Leasing Bonus Procedure.
- The move in form needs to be completed as the applicant moves in to your property. You need to check off each of the line items to confirm that it has been completed.
- Your Manager will then sign off on the bonus form when they go over the folder upon move in.
- LIHTC and AHDP properties will continue to submit to Barbara Frye in the corporate office compliance department.

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Move Out's

These are even easier to do then move-in's! All it takes is a few simple clicks of the mouse.

- Pull up the resident's account from "find person" on their designated move out date.
- Click on "move outs/transfers," then "move out"
- Again, follow the prompts on the left-hand column
- Click move out
- Simple as that! You will have more to do later….

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Renewals

Renewals… such an integral part of keeping a property running. After all retaining residents not only shows that you are doing a great job at your community but it also puts more money in your pockets!

- You can find a detailed synopsis for renewals under "reports, SDE, and tasks," "all reports," and then "lease expiration detail." Which you can then pull based on one month at a time or multiple months ahead.
- Renewal offer letters are to be sent out around 90 days prior to lease expiration, (i.e. send out renewals for leases that expire in July, during the month of April).
- Send out all available offers to the resident. Some properties offer anywhere between 3-15 months, others only offer set terms (i.e. 6 or 12).
- Once the renewals are generated the resident typically has thirty (30) calendar days (confirm with your regional). to get the lease signed (varies by site), with an active insurance policy (if required), and renewed in OneSite.
- If the resident does not renew within the allotted time frame, the offer will need to be reset which could change the offer (this typically only occurs with properties that utilize Yieldstar).
- Depending on your property, leases can be signed either in person or online through their online portal/email.
- All leases need to be thoroughly checked to make sure that all of the paperwork has been signed correctly and completely.
- Contact pending renewals weekly to get an update on renewal status.
- Make sure to document all renewal related conversations in the activity log.
- To audit your renewals, you can pull the report "lease expiration/renewal detail." From here you can pull any date range that you need. There is a drop down option "show renewed leases during report period" that needs to be selected yes. You can also backdate this to previous months if needed.
- The steps that follow show you how to do renewals individually. They can also be done in bulk through the "administration" tab.
- I prefer to do mine individually because it acts as my yearly opportunity to audit their resident account: make sure we have the correct phone numbers, email addresses, updated car information, correct occupants, etc.

- One trick that works for me, especially once you have online renewals is to make sure you have the "Documents awaiting signature" module on your today page. This shows all open packets that are awaiting signatures.

Traditional

To Generate Renewals in OneSite

- Pull up the residents account. Click on "renewals," "generate renewal offers." Under lease term offer details, select "no offer" it will then bring up a popup box where you can select which terms you want to offer.
- Then enter any additional billing that you may have: pet rent, carports, water, etc. Then select save.
- Go back in to renewals and then "print renewal offers." This will pull a letter that you can edit and send out to the door of your residents.

To Renew in OneSite

- Pull up the residents account. Click on "renewals," renew/go month to month." Select the offer that they have chosen. Follow the prompts on the first page and go through until the renewal is complete.

Utilizing Online Renewals

To Generate Renewals in OneSite

- Pull up the resident's account
- Click on "renewals," "generate renewal offers," "generate all offers." This will pull the pricing from Yieldstar (if applicable). Otherwise you will need to discuss pricing with your manager/regional in regards to increases and any short-term premiums.
- Check under "additional billing" that all of the charges are correct i.e. (pest control, pet rents, carports, trash, etc.).
- Then click "save and email offer." This will send the offer letter to all applicable lease holders who have an email in OneSite. It also automatically makes note of this in their activity log.
- Once that is done click back on "renewals," and then "print renewal offers." This will bring up a printable offer letter that you can then put on to the resident's door.

- It is important to do both in case you have a resident that does not answer their email frequently. You have covered both bases.

To Renew in OneSite

    <u>If the lease is signed offline</u>:

- Click on "renewals," "Renew/Go MTM." Select the chosen renewal offer. Enter "lease signed date," "Confirm valid renter's insurance," "confirm utility billing" as applicable (make sure the correct number of occupants is listed, and that all of the boxes have been checked).
- Click on *"Property name* renewal packet – *resident name,"* click on "generate forms," click "refresh contents" until the document has been generated. Click "print view packet." Print out the renewal packet and have the resident and the property manager sign it.
- In order to close the packet, you have to follow these steps.
  - Click the box to the right of "actions" that highlights the box for all of the separate documents. Click on sign documents. "Click on OFSA signatures," then "sign."
    - Depending on your access level in OneSite you may or may not be able to do this. If OneSite will not allow you to do it, then your property manager will have to. In that case skip the next step).
  - Your property manager will have to go in and sign OFSA as well.
  - The goal is to have green check marks in the "final" column.
  - You can then close the packet.
- Once all of those steps have been followed the "next" button should be clickable. Continue through the prompts until it says "finish" or "complete."

    <u>If the lease is signed online</u>:

- The resident can renew by themselves from the initial email that their renewal was sent through. There is a link. They can also log on to their online account and renew through your property website.

- They will need to have their online portal login information. Each leaseholder will have to have their own separate account.
- The resident will select their preferred offer. Then they will be able to follow the prompts to sign their lease offer.
- You will then receive an email once the resident has selected the offer they want as well as when it has been signed.
- Once all leaseholders have signed…
- Click on "renewals," "Renew/Go MTM." The renewal offer will already be selected. Enter "lease signed date, "Confirm valid renter's insurance," "confirm utility billing" (make sure the correct number of occupants is listed, and that all of the boxes have been checked).
- Click on *"Property name* renewal packet – *resident name,"*
  - Click the box to the right of "actions" that highlights the box for all of the separate documents. Click on sign documents, "sign now using DocuSign," and follow the prompts.
    - Depending on your access level in OneSite you may or may not be able to do this. If OneSite will not allow you to do it, then your property manager will have to. Regardless your manager will always sign.
  - The goal is to have green check marks in the "final" column.
  - You can then close the packet. Make sure Packet Status is "Closed-Completed."
- Once all of those steps have been followed the "next" button should be clickable. Continue through the prompts until it says "finish" or "complete."

You can also email a copy of the lease directly to your resident! If they contact the office and tell you that they are wanting to renew, you take the same steps as in an offline renewal.

- Click on "renewals," "Renew/Go MTM." Select the chosen renewal offer. Enter "lease signed date," "Confirm valid renter's insurance," "confirm utility billing" (make sure the correct number of occupants is listed, and that all of the boxes have been checked).

- Click on *"Property name* renewal packet – *resident name,"* click on "generate forms," click "refresh contents" until the document has been generated. Click "sign documents." Then "Household Signatures using DocuSign," click "sign," and then "Send E-mail" to Head Of Household.
- The lease contract is then directly sent to each leaseholder's email account. We have to have a different email for each leaseholder in order for this to work.
- In order to close the packet, you have to follow these steps.
  - Click the box to the right of "actions" that highlights the box for all of the separate documents. Click on sign documents, "sign now," and follow the prompts.
    - Depending on your access level in OneSite you may or may not be able to do this. If OneSite will not allow you to do it, then your property manager will have to. Regardless your manager will always sign!
  - The goal is to have green check marks in the "final" column.
  - You can then close the packet.
- Congratulations! You have successfully renewed your resident!

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Renewal Bonus

Once a resident has renewed their lease and it has taken effect, the entire staff is rewarded with a bonus! This is to be completed by your property manager, but it is a good idea for you to know how it works too.

- Please refer to your Manager and/or Maxus123.com for policies regarding bonus amounts.
- All renewal bonuses need to be signed off and reviewed by the manager prior to submission to the home office.

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Notice to Vacate (NTV)

Sometimes a resident cannot be saved. Maybe they have decided to move to another part of town, or started a job in another state.

- Make sure that all notices are entered the same day that they are received.
- It is important to get a forwarding address from the resident so that their refund check, or on the flipside their charges, will be delivered to the correct address
- When entering the notice in OneSite, unless there is going to be unusual wear and tear on the apartment the standard turn time frame should be used.
- Most Maxus sites require a sixty (60) day written notice prior to lease expiration for any resident that wishes to move out. Check with your Property Manager for the specific requirements for your property.
- After the lease has expired, and the resident has not given notice, they are automatically on month-to-month. Month-to-month leases may require a different type of notice; please refer to that person's particular lease.
- Send a copy of the move out confirmation letter and "checklist for vacating premises" to the vacating residents either through the postal service or to their door.

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Pre-Move Out Inspection Walks

Either you or your property manager need to make sure that all units are walked for a pre-move out inspection within three days of receiving the notice to

vacate. This must be done in Happy Inspector (IF your property uses Happy Inspector).

- By doing a pre-walk we can use this time to inspect the apartment to see what costs we will have at move out:
  - o Will the carpet or vinyl need to be replaced?
  - o Is there any extensive damage that would require a longer turn time?
  - o Will we have to do a full paint or just a touch up?
- We can also assess for any damages that we see to charge the resident prior to the moving out:
  - o Blinds
  - o Carpet patches
  - o Wall damage
  - o Accent wall/paint changes
  - o Smell of smoke/strong odor in the apartment (would there be an ozone charge)
  - o Any major stains/damage on the inside or outside
- By walking the apartment early, we can attempt to collect this money prior to move out so that there aren't as many surprises and less money is being lost to collections.

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Final Account Statements (FAS)

All good things must eventually come to an end. Once a resident vacates your property there are steps that must be followed.

- All residents that move out require picture documentation for any charges to be billed.
- All final accounts must be completed within five (5) days after move out.
- <u>All move out final accounts must be sent to Cathy.</u>
- All cancelled and denied applicants also require an FAS. Cathy must be notified when any FAS is completed.

<u>In OneSite:</u>

- Pull up the residents account through "find person" or "resident."
- Click on "close account"
- Check to make sure that the forwarding address is correct and click "next"
- Enter in the charges that are to be billed under "add charge." The code will depend on what is being charged… ie "carpet, cleaning, damages, etc." Once complete click next.
- Double check that all charges, deposits, and addresses are correct and click "finish."
- Once this has been completed then use the following procedure based on the type of final account.
- All final accounts are then emailed to Cathy Whorton at Maxus
- Email subject line: FAS (Residents Last Name) – (Refund Due, Balance Due, or Zero Balance)

<u>For a Refund Due or Zero Account Balance (attach in the following order)</u>

1. FAS form
2. Resident ledger from move in to move out
3. Move in inspection form
4. Move out inspection form
5. Notice to vacate form
6. First and last page of lease

<u>For a Balance Due (attach in the following order)</u>

1. FAS form
2. Resident ledger from move in to move out
3. Move in inspection form
4. Move out inspection form
5. Notice to vacate form
6. First and last page of lease
7. Rental applications

<u>TIPS</u>

- One thing that helps me in situations where damages are not itemized on the "checklist for vacating premises" or greater than normal wear and tear, I call in our carpet cleaning vendor to give me an evaluation for the carpet clean. That way you have documentation of what the charges would be to bill back to the resident. I always make sure to attach that to the "final account statement" folder in the docs tab. I do this for all move outs.
- Make sure to follow the "checklist for vacating premises" when it comes to charging for routine things like a dirty toilet, drip pans, and an oven clean. We want all of the standard charges to be the same for all the move outs.
- I always attach a copy of the final account statement documents that I send to Cathy in the "final account statement" folder in the docs. Just in case I ever need to access all the documents quickly they are in once place. That goes for the move in and move out inspections too.

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Termination Fees

Other times life happens, and sometimes there are circumstances that will cause a resident to break their lease prior to their expiration. Please see your property manager for state and local regulations.

- In regards to breaking a lease, termination fees, etc. – please refer to your Manager and/or Maxus123.com for policies and guidelines.
- This is coded to TERMFEE.
- Residents are able to set up a payment plan with your property. It must follow the guidelines set forth by Maxus which can be found on Maxus123.com

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Reports to Audit

As the number keeper of the group it is important to weekly audit all activity that has gone through OneSite. This way you can catch any errors that may have been made.

- Audit the "prepaid/delinquent report" at least once (1x) per week. You are checking to make sure that the balances and credits are correct.
- Audit the "rent roll detail" to make sure that all charges are correct for each account.
- Audit "resident deposit audit" to make sure that there are no outstanding deposits that have not been accounted for. Make sure that the deposits in OneSite match the required deposit in their file.
- Audit "availability." Check to make sure that the make ready dates are correct in the computer and being completed on time.

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Pre-Bill

If you are set up with Velocity billing, each month the residents will receive a bill from the third-party vendor. This bill shows all of the fees they are responsible for as a part of their rent payments. This is especially helpful if you have fees that vary each month (like water/sewage).

- The pre-bill must be approved each month (date will vary by site). Your manager will receive an email that it is ready to approve. It will also appear as a task when you try to forward the date.
- You can also access the pre-bill through the Velocity tab in OneSite, click on "resident billing," "pre-bills," then "approve pre-bills."

Once the pre-bill has been brought up there are ten (10) different tabs that you have to look through and edit to insure accuracy. I would make a list of all of the changes that need to be made so you can do them all at once, after you have audited the entire pre-bill.

1. Utility designation: This section will showcase any unbilled charges that are due to the resident.
2. Resident charge exception: This shows any billing that falls outside of what standard for that particular unit. Check each individual ledger to make sure the correct number of occupants is listed. This could also indicate that one of your buildings' water and sewage charges is higher than normal (could indicate a leak)
3. Expiring leases: This is a list of all leases coming up in the following month who have not yet renewed in OneSite. You will have to go in to each individual ledger and charge up the MTM rate if that has not already been done. When you do so make sure that the MTM rate starts the day after their current lease expires. OneSite automatically begins the MTM rate on the next calendar month.
4. Billing address: Check to make sure that the apartment address and email addresses are correct so that the bills are sent to the proper place.
5. Resident charges: Check to make sure all open charges and credits are accurate.

6. Utility invoice review: There is nothing for you to do on this page. It shows the billing for each building of water and sewage.
7. Charge summary: There is nothing for you to do here either. This summarizes the water and sewage total for the property and how much is claimed by the property and billed back to the resident.
8. Utility charge analysis: This provides several different factors to look at. The property variance shows the differences in the occupant count from the previous billing period to current. The utility invoice variance shows the differences in the cost of water and sewage from the previous billing period to current.
9. Do not bill: This is a reiteration of who has not been billed. If all you see are activation fees, this can be fixed directly from the pre-bill screen. We will come back to this in a few minutes…
10. Message board: You can add custom messages to the bill that all of the residents will receive.

Once you have looked through all of these tabs and made notes for whatever needs changing (i.e. pet rent was not present on a particular unit, or you had a renewal that had not been entered). Exit out of the pre-bill and make the adjustments that are required (do not make any changes to the activation fee).

Go back in to the pre-bill and click "reprocess." This will update the pre-bill to reflect any changes that you have made.

Now you can make the changes for the activation fees…

1. Click on the "do not bill" tab. You will see a dollar amount in the "utility charges." This is the amount that has not been billed. Click on this dollar amount. It will open a popup screen. Click on "enabling billing status." Click on the "activation fee" then "save billing status." You will then see that charge reflected in their charges.
2. Go through each resident on this list the same way.
3. The goal is to have "no data to display" on this tab.

Once the final changes have been made you have to go through each tab and approve each page. After all have been approved the "approve pre-bill" box will become active.

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Market Survey

In order to succeed it is important to develop a friendly relationship with your nearby competition and to be aware of the trends that are happening in your area.

- Check with your manager to determine which properties are your competition
- There is a specific format which is required to complete your market survey which will be emailed to you.
- At least twice a month I would call your comps to check to see if they are running any specials, have changes in their pricing, availability, or fees. That way you are in the loop on what you are competing against.
- Market surveys are due to Maxus around the 15th of the month. Check on Maxus123 and the monthly calendar to get the exact date (can fluctuate depending on what day the 15th falls on).
- Send these to the assistant to the regional manager, regional manager, and your property manager.

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Insurance

Every resident is required to have insurance that lives on the property. You only need one policy per apartment home.

- *A renter's insurance policy is NOT required for LIHTC or AHDP properties.*
- All residents are required to have $100,000 in liability insurance and whatever personal coverage they want.
- Maxus works exclusively with ERenters Insurance. You are not able to advertise any other agency within your office, but that does not stop a resident from using whomever they choose.
- Renter protection is charged on the first day of the calendar month. Every apartment without active insurance will be charged a $75.00 renter protection non-compliance fee. Make sure that all active insurance has been entered prior to the end of the day on the 30th/31st.
- Under "reports, SDE and tasks," click on "all reports," then find "renters insurance status report You should run this at least twice (2) a month to insure that you are on top of your insurance. This will provide you a full list of all of the insurance policies of all of your residents.
- You can also add the "renters insurance" module from the "customize" screen on your OneSite home page. This will bring up any cancelled, pending cancellations, or anyone who is currently under renter protection.

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The Learning Continues

No matter how long you have been in the business or how much experience you have, fair housing laws are always changing. It is important to keep educated and strive to learn and discover new things.

- It is integral to keep ahead of your classes in Grace Hill. You don't want to fall behind. Check at least twice a month to make sure that you are 100% complete with your classes!
- Same goes with your LMS classes. It is a useful tool to help learn to navigate all of the complexities of OneSite.
- If your area offers local one-day courses in Fair Housing, or Leasing, talk with your property manager if it could be an option for you!

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I hope you have found this guide a helpful tool in your learning process!

Thank you for coming on this journey with me!