

Resident Services

Coordinator

System Manual



Purpose Statement:

To improve the lives of real estate investors and residents through property management solutions.

Systems Resident Services Coordinator (RSC)

KRA's – Key Result Areas

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- 2. Data Entry for New Resident Leases – p15
- 3. Lease Renewal Process – p16
- 4. Resident Move-Out Coordination – p19
- 5. Other – p23

Templates:

1. Residents

- a. New Resident Welcome E-mail
- b. Receipt of Check-In Sheet - Email
- c. Lease Assignment Checklist
- d. Misc Resident Letters - FOLDER
- e. Request for Lease Assignment
- f. Lease Assignment Agreement
- g. Additional Provisions Amendment for Lease Assignment
- h. Request for Pet Approval
- i. Lease Assignment Completed – Folder
- j. Quarterly Paper Change EM

2. Turnovers

- a. Normal NTV Form
- a. Normal NTV Form.PDF
- b. Security Deposit Return Form
- c. Turnover Checklist
- d. Vacant unit inspection form
- e. Resident Confirmation of NTV – EM
- ee. TCS & Clay Resident Confirmation of NTV – EM
- f. Property Coming Vacant – Owner EM
- g. Lease Break NTV
- gg. Lease Break NTV.PDF

3. Resident Welcome Packet

- a. Check in Sheet Form

- b. Welcome Letter
- c. Citizen Home Solutions Flyer
- d. Avoid Being Scammed Letter
- e. Renting vs Buying

4. Lease Renewals

- a. Residential Lease Rental Agreement Extension.pdf
- aa. Residential Lease Rental Agreement Extension
- b. Residential Lease Renewal Letter - EM
- c.
- d. Renewal Spreadsheets
- e. Completed Lease Renewals
- f. Renewal Lease Fee Invoice
- g. Month-To-Month Resident Notification - Email
- h. Owner Renewal Notification – Email
- i. Owner MTM lease notification – EM
- j. Receipt of renewal to tenant – EM
- k. Renewal checklist
- l. MTM Rate Increase Letter
- m. PM Lease Renewal Notification Email

5. Other

- a. Behavioral Values
- b. Office Policy
- c. PE - Resident Services Coordinator
- d. Letterhead
- e. Password
- f. Recurring Monthly Calendar
- g. Utility transfer forms – Folder
- h. Crisis Management Birthdays

Position Overview - RSC

The Resident Services Coordinator will report to the Vice President of Operations.

As the RSC will be the 'face of Grace Management' for most residents, the RSC shall conduct themselves in a friendly, helpful, and professional demeanor at all times. Whether dealing with residents, owners, vendors or other Grace Management team members a high degree of customer service, empathy, and an overall friendly demeanor is absolutely necessary.

System Manual Overview:

The system shall run the business, and the team members shall run the system. Systems are simply road maps or instructions that allow the Grace Management processes to be repeated and easily duplicated.

Property management done on a large scale is an extremely complex business with many moving parts. In order for Grace Property Management to be successful, it must be consistent.

The purpose of the system manual is to provide a consistent and specific way of doing business, and to ensure that each property, resident, owner, and as much as possible, each situation, are treated the same. Also, to define HOW Grace Property Management will do property management.

The System Manual will provide each team member with specific KRA's (Key Result Areas) for which they are responsible and a specific measure of success for each KRA, so that each team member always knows whether or not they are succeeding.

Team members should always refer to their specific system manual to determine the answer to a question before bringing that question to the VP of Operations.

Any deviation outside of the system must be recognized as an exception to the system. While exceptions are necessary from time to time, each exception is by nature inefficient, and should therefore be avoided.

Each team member shall constantly work to improve the system. One purpose of the monthly Performance / Evaluation meeting with the VP of Operations is to ensure that on-going system improvements are suggested, discussed and implemented.

1 – Resident Relations

Measure of success: Receive one compliment and no complaints monthly.

1. If a residential resident has a request, complaint, problem, or other issue **NOT** relating to maintenance or payment issues, it is first the responsibility of the RSC to try and resolve the issue.
 - a. If a resident has a complaint about maintenance such as “This is my 2nd request / I have not heard back from anyone” the RSC should take ownership of the issue and get it resolved. Get all of the specific info from the resident, report it to the Property Manager (PM) AND follow up with the resident for a resolution. The VPO & VPM should be cc'd on all e-mails that are reported as “2nd request”.
 - b. If the resident asks about breaking their lease, the RSC should give the resident the NTV template explaining how to break your lease (2.a).
 - c. If the resident has rent payment questions or problems, the call or email should be forwarded to the DA.
2. Make every effort to resolve all resident requests, disputes or issues between residents/neighbors.
 - a. If the dispute / issue escalates or you feel you are not able to resolve the issue, pass the issue to the PM.
 - b. The resolution of an issue should follow the terms of the Lease Agreement. If the lease agreement does not address the issue, refer to the Office Management System Manual. If neither the Lease Agreement nor the Office Management System Manual addresses a particular issue, see the PM.
3. Any resident issues that are HOA related will be handled by the PM.
4. Any fact related questions from residents should be directed to and handled by the RSC. Fact related questions are those questions that relate to items such as:
 - a. “How much is my security deposit”
- find on resident window in Rentvine
 - b. “When is my lease term up for renewal”
- find on resident window in Rentvine
 - c. “Does my lease allow me to have pets”
- Check Rentvine or with the PM. To add the pet, the RSC will work them through the process.

- d. “Can I get a copy of my lease agreement”
 - First look to see if the lease agreement has been uploaded to the tenant portal in Rentvine. If not, pull the lease from the file, scan & e-mail it to them, then upload onto the tenant section in Rentvine.
- e. “How do I give a notice to vacate”
 -Resident can download the NTV from rentgrace.com or the RSC can provide them the form via Rentsign.
- f. “I need a copy of my community pool key”
 - The RSC should bring the PM into the shop to better assist.
- g. “I want to add a roommate to my lease”
 - Follow the GM lease assignment process (template 1f)
- h. “I want to remove my roommate from my lease”
 - Follow the GM lease assignment process (template 1f)
- i. “I need a mail key”
 - If it is a new resident in, the RSC should research and get the new resident a key. Check in Rentvine, the key room, and with the PM to find out why the key was not left in the unit, as it should have been.
 - For cases of existing residents who have lost a key: Check the key room to see if we have an extra (tell them to get a copy made and return our original). If we don't have a copy, they will need to get a new key issued from the post office.
 - If a key is provided to the resident from GM for them to keep, this will be a \$10.00 charge to the resident. Inform the DA to charge this up as needed.

5. The RSC shall handle all lease assignment (removing or added tenants) requests. Lease assignments typically happen in one of the below two cases.

Case 1: One resident is moving, and one is staying.

- In this situation, the resident who is staying in the property will need to go through the approval process to see if they will be approved by themselves. **No app fees, only the lease assignment fee** Follow template 1.e.

Case 2: One resident is being replaced by another resident.

(Adding someone to current lease with an existing resident)

- In this situation, the DL will run the interested applicant's application and review their credit, criminal and eviction history. If the applicant has no criminal or eviction history or other auto declines based on rental criteria, then the DL will pass to the RSC who will give to the PM for approval. If approved, the PM will notify the RSC to contact the existing resident and the applicant to notify them of their approval. If the applicant has criminal or eviction history and is denied, the DL will notify the applicant through email (using the DLs Template 1.ff via Rentvine). The DL will update the RSC with this detail and advise the RSC that they need to only contact the current resident and that the applicant has been notified of their denial. **App Fees apply in addition to the lease assignment fee** Follow template 1.e.
- a. The RSC will use Rentvine to ensure that the applicants pre-qualify for the property. Ex: Number of occupants, pets are allowed, etc.
 - b. Follow the steps on the Lease Assignment Checklist (template 1c)
 - c. FYI – The “assignor” is the current lease holder who is leaving, the “assignee” is the party that is taking over the lease
 - d. GM will only perform 1 lease assignment per GM lease agreement. Meaning if another requests is made for a lease assignment, the resident will need to complete a Visible Damages Lease Assignment instead. See template 1.e for more information.
6. When a resident 'check-in-sheet' is received, it should go to the RSC.
 - a. Fill out and sign the bottom of the doc in the area indicated to record our receipt of the document
 - b. Email via Rentvine the resident the template 'receipt of check-in sheet' (template 1b).
Email the signed check-in-sheet to the PM for their review and load into Rentvine. Be sure to share this document to the tenant's portal.
 - d. Any repair requests noted on the check-in-sheet MUST be submitted as regular service/repair requests by the resident.
 7. Update all resident contact information. Anytime the RSC is conversing with a resident, they should ALWAYS ask to “let me confirm your phone and e-mail address”
 8. As much as possible, the RSC should try and answer the phone rather than letting it go to voice-mail.

2 – Data Entry for New Resident Leases

Measure of Success: Complete your checklist items on the New Lease Checklist within 1 business day of receipt.

1. When the DL has completed the signing of a new lease, they will initiate a New Lease Checklist via RV that the Administrative Accountant will work. Through this process the RSC will be notified to complete their steps.
2. Upon receipt of this new lease file, the RSC should complete all items on the 'New Lease Checklist' by initialing the appropriate line items as they have been completed. It is important to get this process completed ASAP after receipt of the file.
3. As instructed on the New Lease Checklist, inform Citizen Home Solutions (Free Concierge Service) of all appropriate utilities. They will help the tenants transfer utilities from the owner's name to their name effective as of the move-in date.
 - a. The appropriate utility providers will be listed in the properties' marketing information.
 - b. For utility companies that require the resident to call in directly; notify Citizen Home Solutions of this so they tell the tenants they need to call personally. Citizen should also provide the resident with the contact information.
 - c. For utility companies that require the management company to call in directly; notify Citizen Home Solutions that you will take care of this transfer. They complete the transfer with the utility company.
 - d. At the time of transfer, Citizen Home Solutions will confirm with the utility company that they will send the final billing to the GM office address.

Citizen Home Solutions will follow up 4 times (phone, text & email) to confirm that all utilities have been transferred. If they cannot confirm with the tenant after 4 attempts, they will contact the RSC by email. The RSC needs to contact the resident and confirm that utilities have been transferred.

If a resident is required to make the transfer request and has not done so in 3 business days **from the date of move-in**, notify resident that service will be turned off and request such turn off from utility company.