

GENERAL MANAGER UPDATE: MEMBER PORTAL

May 28, 2021



THE NEED FOR A MEMBER PORTAL

- The Board, Committees and several members expressed the desire for a secured Member Portal and a better way to access account and Association information.
- Staff and consultants reviewed over 12 different software options, including three "best in class" products to see which would meet the needs of the Association best.
- Member Portal software is also to replace the current no-longer-supported accounting software as well as Architectural Standards and Covenants software.
- After months of research, staff and consultants selected eUnify as the new Member Portal software.



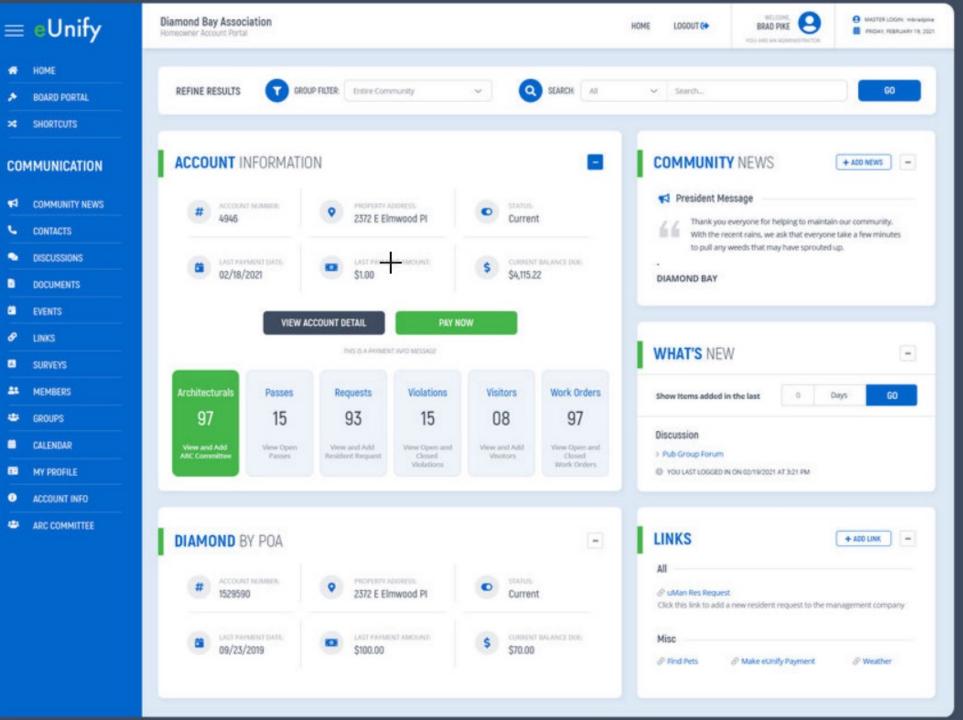
HOW DOES eUNIFY BENEFIT THE MEMBERSHIP?

- Easy, convenient web access 24/7 via the website or a mobile app
- Online payment for Annual Assessments, fees and fines
- Update your profile directly including contact information and mailing address
- See a complete history of your payments, permits and violations
- Access Association documents securely and keep Association documents within the membership

SAMPLE MEMBER PORTAL HOMEPAGE

- Current balance
- Last payment
- Pay Now button
- Robust left navigation
- Streamlined user experience

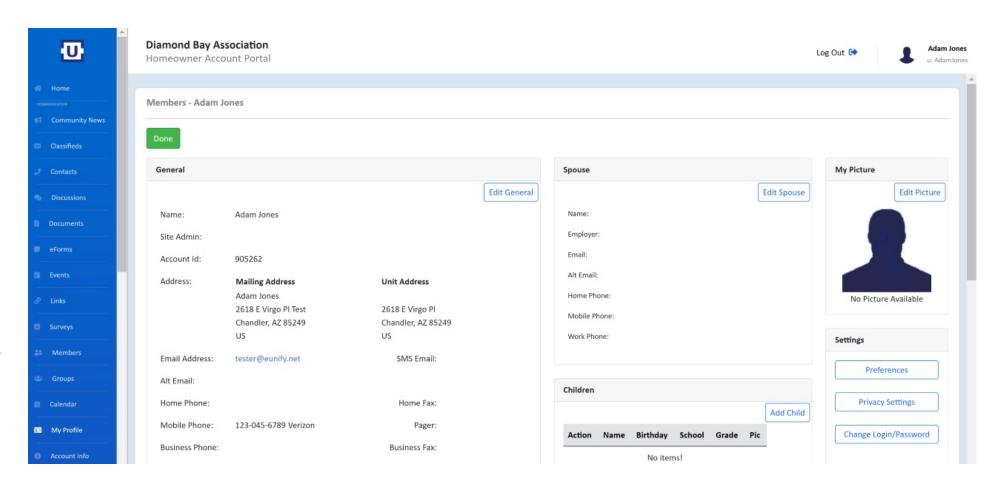
Note: not all fields shown in this sample will apply to Tahoe Donner



SAMPLE MEMBER PORTAL CONTACT PAGE

- Easily view current information on record
- Easily edit mailing address and contact info
- Upload photo
- Change personal preferences
- Change login and password

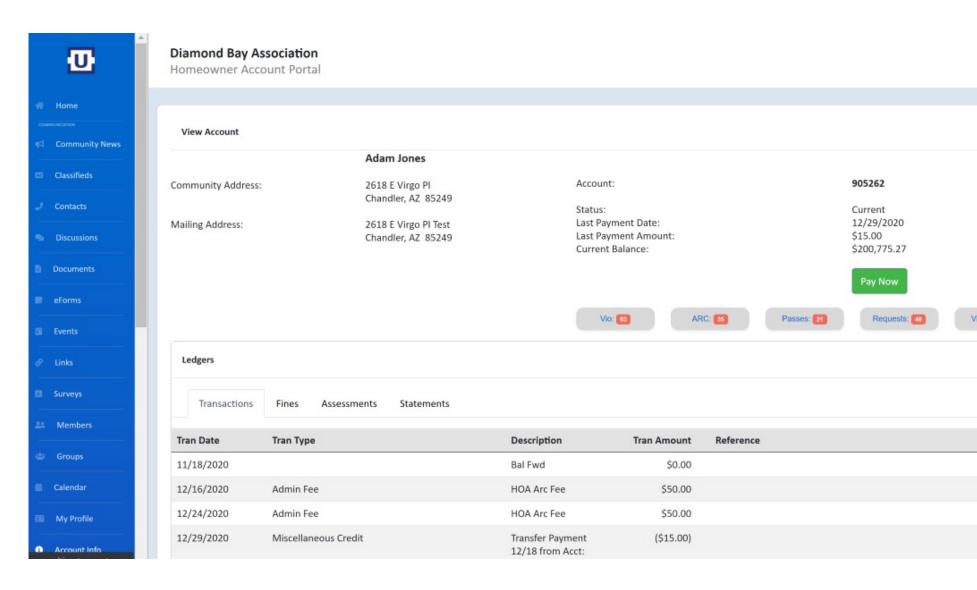
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SAMPLE MEMBER PORTAL ACCOUNT DETAIL PAGE

- Easily view current balance and utilize pay now button
- See payment/account history
- Sort by fee/payment type

Note: not all fields shown in this sample will apply to Tahoe Donner



MEMBER SERVICES ENHANCEMENT

- eUnify will allow Member Services staff to access your account information (not previously available) to support the vast majority of membership needs, reducing the need to transfer to another department.
- Member Services will now have access to all point-of-sale records and member account records, truly advancing the department to be a one-stop shop for the membership.

ACCOUNTING EFFICIENCIES

- Reduce Annual Assessment billing process from multiple days to a few clicks of the mouse
- Pay within the Member Portal with payments automatically posting to member accounts (currently manual and not real time)
- Members can easily select to go paperless
- Fulfillment of paper account mailing/statements automated through print house at a cost
- Full banking integration, reducing the number of places needed to log in to view banking records including viewing check images or deposit data
- Vendor Portal allows for electronic submission, and paperless accounting including coding and approving
- Vendor checks can be e-signed, eliminating potential delay and simply less paper handling
- Simplify customized reporting process
- Simplify journal entry creation
- · Budget and forecast modules with integrated notations to each account



ASO/COVENANTS EFFICIENCIES

- Consolidated member info to limit discrepancies
- Ability to access "good standing" status from Accounting
- Cloud software, includes heat mapping
- Portal offers:
 - Online payments of assessment, permits, fines benefit both member and ASO to see current status
 - Members can submit documents and requests through portal
 - Board and Committee can access meeting documents for prep/review
 - Ability to post neighbor notification docs onto portal to view
- Ease of creating letters, PDF to emails, mailing and do mass notifications
- Build reports on any data field
- Track items on each property home screen (registered STR, ADU, Held in Abeyance, etc)



eUNIFY ROLLOUT TIMELINE

Implementation kickoff and process planning

Build/test
and educate
about the
system and
future
change

Run both
system in
parallel for
final testing

Go live and member education

Run Annual
Assessment
billing and
payment
through the
new system

Post implementation support

QUESTIONS?

THANK YOU