



# GENERAL MANAGER UPDATE: MEMBER PORTAL

August 27, 2021

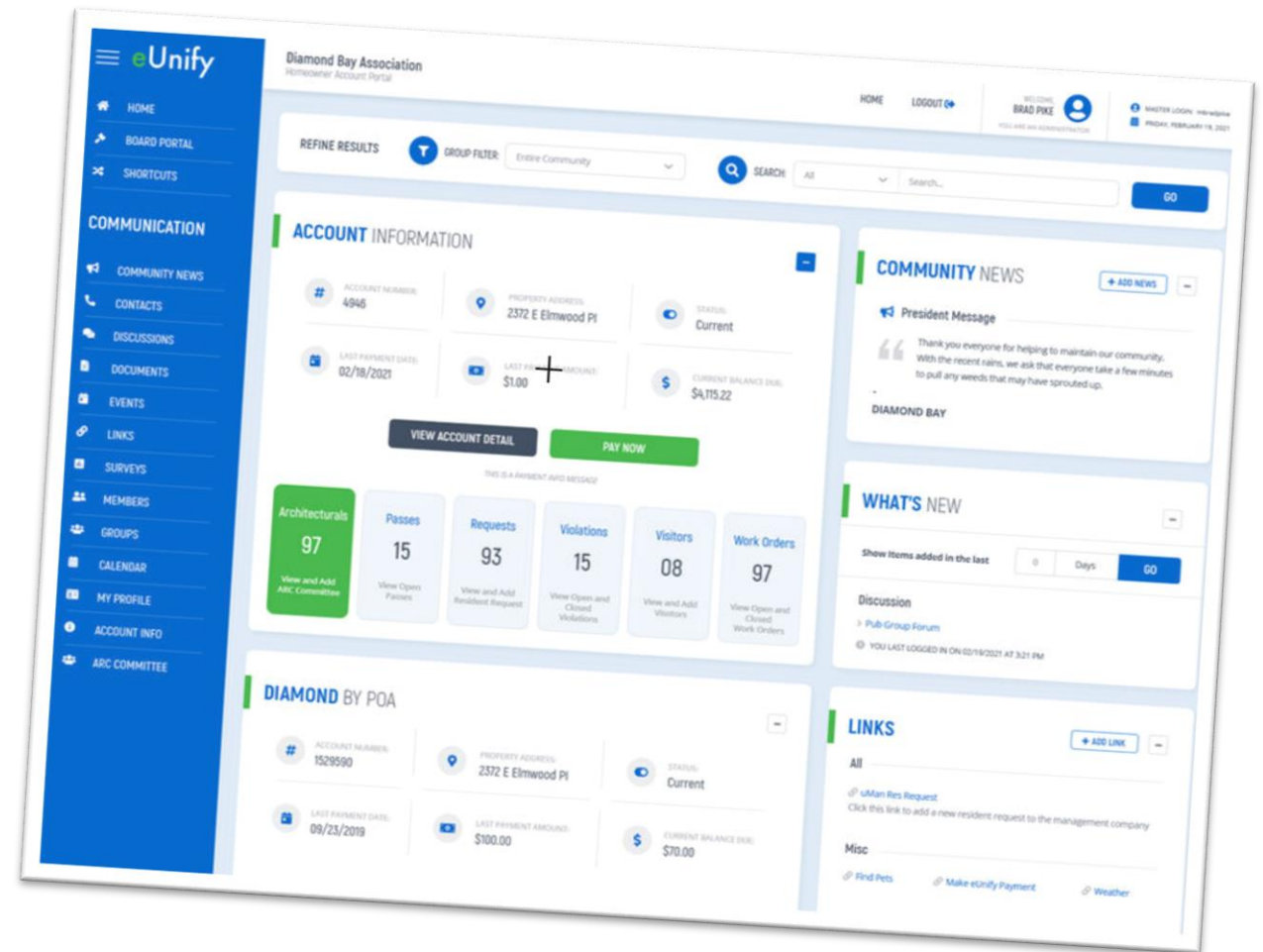
# THE NEED FOR A MEMBER PORTAL

- 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.**



# WHAT IS eUNIFY AND HOW DOES IT 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, ASO permits and covenants violations
- Access Association documents securely and keep Association documents within the membership



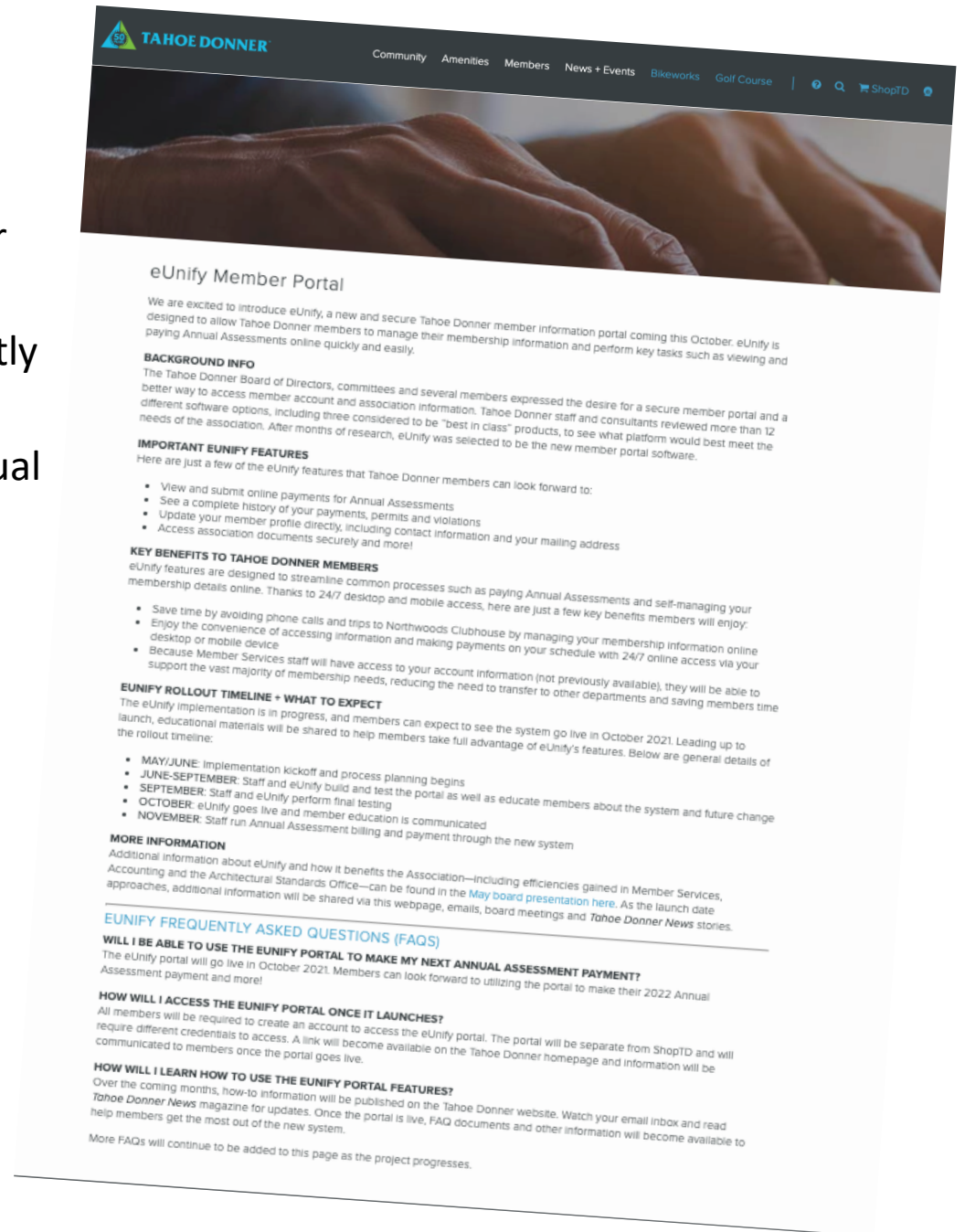
# HOW ARE WE INFORMING OUR MEMBERSHIP

- Creation of informational web page and integration in Member Section web navigation
  - Background, features, benefits, rollout schedule, Frequently Asked Questions
- Inclusion in various GM email updates, weekly emails and annual meeting presentation since June
- August *TD News* Briefs feature

## Upcoming – September is the biggest education month

- September *TD News* 2-page story (currently at print)
- Dedicated email
- Planned Nextdoor Post
- September board meeting status update

Once the portal is live, an extensive sign-up campaign will be initiated to all members.



The screenshot shows the Tahoe Donner website with a navigation bar at the top containing links for Community, Amenities, Members, News + Events, Bikeworks, and Golf Course. Below the navigation bar is a large image of hands clasped together. The main content area features the following sections:

### eUnify Member Portal

We are excited to introduce eUnify, a new and secure Tahoe Donner member information portal coming this October. eUnify is designed to allow Tahoe Donner members to manage their membership information and perform key tasks such as viewing and paying Annual Assessments online quickly and easily.

#### BACKGROUND INFO

The Tahoe Donner Board of Directors, committees and several members expressed the desire for a secure member portal and a better way to access member account and association information. Tahoe Donner staff and consultants reviewed more than 12 different software options, including three considered to be "best in class" products, to see what platform would best meet the needs of the association. After months of research, eUnify was selected to be the new member portal software.

#### IMPORTANT EUNIFY FEATURES

Here are just a few of the eUnify features that Tahoe Donner members can look forward to:

- View and submit online payments for Annual Assessments
- See a complete history of your payments, permits and violations
- Update your member profile directly, including contact information and your mailing address
- Access association documents securely and more!

#### KEY BENEFITS TO TAHOE DONNER MEMBERS

eUnify features are designed to streamline common processes such as paying Annual Assessments and self-managing your membership details online. Thanks to 24/7 desktop and mobile access, here are just a few key benefits members will enjoy:

- Save time by avoiding phone calls and trips to Northwoods Clubhouse by managing your membership information online desktop or mobile device
- Enjoy the convenience of accessing information and making payments on your schedule with 24/7 online access via your desktop or mobile device
- Because Member Services staff will have access to your account information (not previously available), they will be able to support the vast majority of membership needs, reducing the need to transfer to other departments and saving members time

#### EUNIFY ROLLOUT TIMELINE - WHAT TO EXPECT

The eUnify implementation is in progress, and members can expect to see the system go live in October 2021. Leading up to the launch, educational materials will be shared to help members take full advantage of eUnify's features. Below are general details of the rollout timeline:

- **MAY/JUNE:** Implementation kickoff and process planning begins
- **JUNE-SEPTEMBER:** Staff and eUnify build and test the portal as well as educate members about the system and future change
- **SEPTEMBER:** Staff and eUnify perform final testing
- **OCTOBER:** eUnify goes live and member education is communicated
- **NOVEMBER:** Staff run Annual Assessment billing and payment through the new system

#### MORE INFORMATION

Additional information about eUnify and how it benefits the Association—including efficiencies gained in Member Services, Accounting and the Architectural Standards Office—can be found in the [May board presentation here](#). As the launch date approaches, additional information will be shared via this webpage, emails, board meetings and *Tahoe Donner News* stories.

#### EUNIFY FREQUENTLY ASKED QUESTIONS (FAQS)

##### WILL I BE ABLE TO USE THE EUNIFY PORTAL TO MAKE MY NEXT ANNUAL ASSESSMENT PAYMENT?

The eUnify portal will go live in October 2021. Members can look forward to utilizing the portal to make their 2022 Annual Assessment payment and more!

##### HOW WILL I ACCESS THE EUNIFY PORTAL ONCE IT LAUNCHES?

All members will be required to create an account to access the eUnify portal. The portal will be separate from ShopTD and will require different credentials to access. A link will become available on the Tahoe Donner homepage and information will be communicated to members once the portal goes live.

##### HOW WILL I LEARN HOW TO USE THE EUNIFY PORTAL FEATURES?

Over the coming months, how-to information will be published on the Tahoe Donner website. Watch your email inbox and read *Tahoe Donner News* magazine for updates. Once the portal is live, FAQ documents and other information will become available to help members get the most out of the new system.

More FAQs will continue to be added to this page as the project progresses.

# eUNIFY ROLLOUT TIMELINE

**MAY/JUNE**

Implementation kickoff and process planning

**JUNE-SEPTEMBER**

Build/test and educate about the system and future change

Accounting staff training started

**SEPTEMBER**

Run both system in parallel for final testing

Extensive staff training

**OCTOBER**

Go live and member education

**NOVEMBER**

Run Annual Assessment billing and payment through the new system

Post implementation support



# QUESTIONS?

## THANK YOU

