



# GENERAL MANAGER UPDATE: MEMBER PORTAL

September 24, 2021

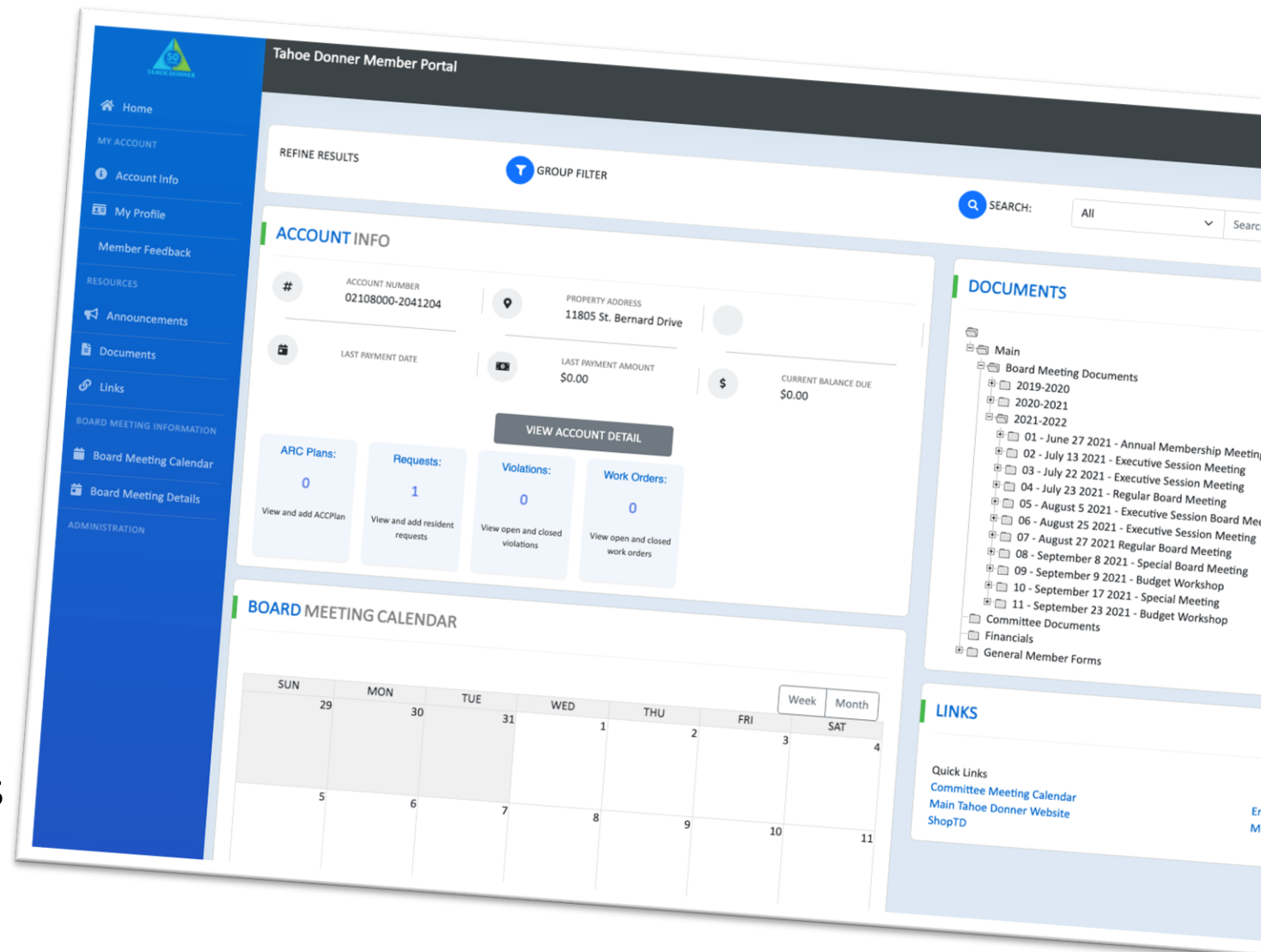
# THE NEED FOR A MEMBER PORTAL

- 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 contact information
- Access Association documents securely and keep Association documents within the membership
- See history of your payments, (coming soon) permits and violations



# eUNIFY ROLLOUT TIMELINE

SEPTEMBER

Accounting to run both system in parallel for testing

Association documents (board, committee, financial, forms) uploaded

Extensive staff training and workflow development

OCTOBER

Accounting upload complete Oct. 1 and system live for accounting.

Member testing begins after accounting upload complete.

Member Portal go live date: October 18

NOVEMBER

Run Annual Assessment billing and payment through the new system

ASO/Covenants go live

Post implementation support



# MAJOR ACCOUNTING ACCOMPLISHMENTS

- Banking relationship with Pacific Premier allows integration with eUnify for accounting purposes
- Payment processor Paylease integrates with both Pacific Premier and eUnify to allow seamless, free online payment (fees apply to credit card payments)
- Loaded chart of accounts and department structures
- Loaded primary owner and unit information
- Initial vendor upload
- 2021 Budget upload

# MAJOR MEMBER PORTAL ACCOMPLISHMENTS

- Education/Change Readiness campaign in full swing
  - TD News Story, Dedicated Member Email, Nextdoor Post
- Training and workflow development with Member Services
- Early test group identified scheduling to test the member experience
- Loaded all board meeting documents back to 2019, additional to be added in the coming weeks
- Loaded all committee and financial documents
- Setup login page for users on [tahoedonner.com](http://tahoedonner.com)
- October TD News article to help continue to educate members on key functionality of the portal and the process for getting registered

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

# QUESTIONS?

## THANK YOU

