



GENERAL MANAGER UPDATE: MEMBER PORTAL

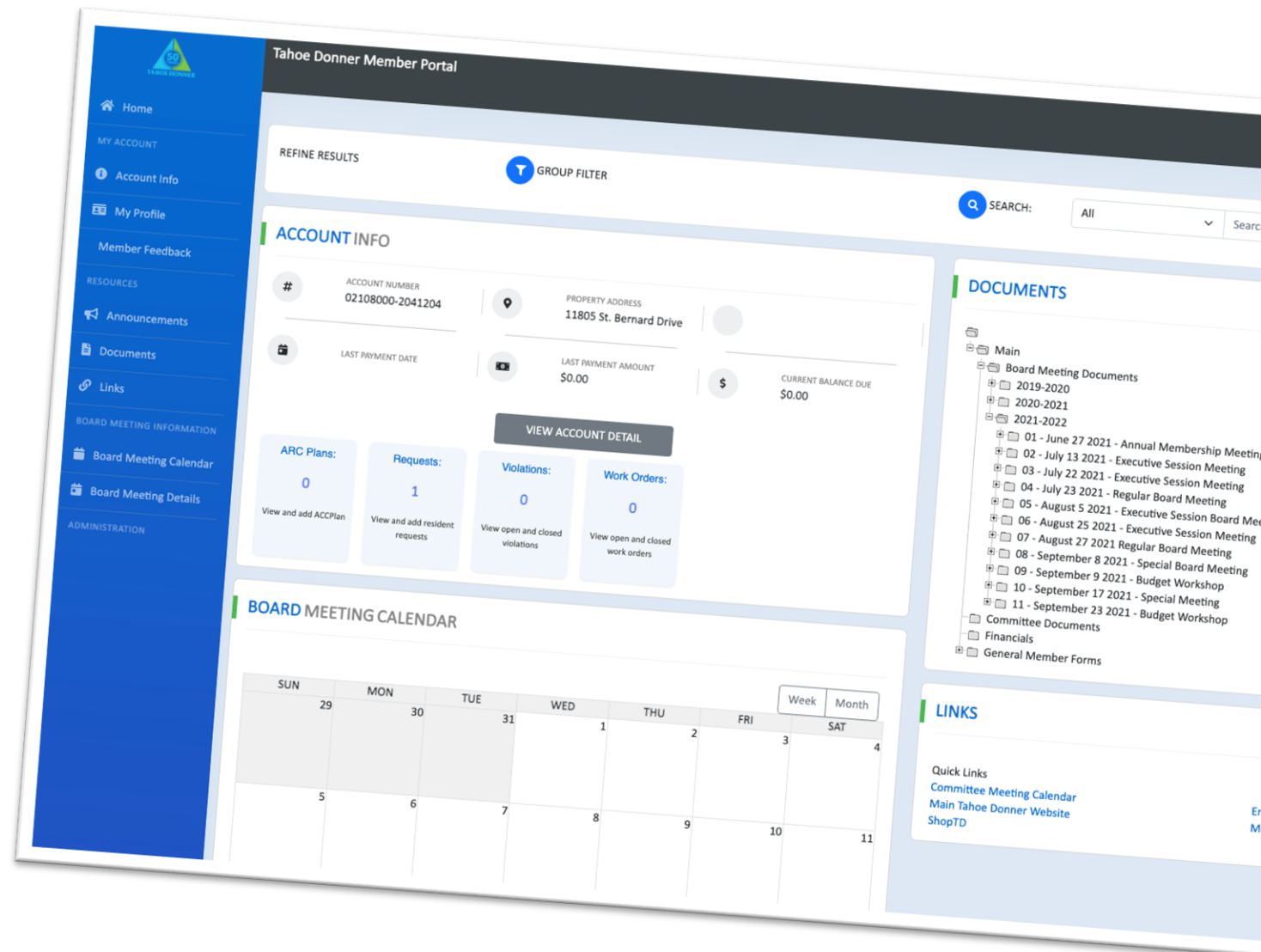
October 22, 2021

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 24/7 web access
- 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, view permits and violations



eUNIFY ROLLOUT TIMELINE

OCTOBER

Accounting upload complete Oct. 1 and system live for accounting

User testing

Member portal live for members Oct. 18

ASO/Covenants training

NOVEMBER

Run Annual Assessment billing and payment through the new system

Post-implementation support

ASO/Covenants inspections and project closures in the old system + data migration and testing in eUNIFY

DECEMBER

Rollout of mobile application for tablet and smartphones

Member letters moved to portal

ASO/Covenants data validation and final testing



MAJOR ACCOUNTING + ASO ACCOMPLISHMENTS

- Accounts Payable approval process tested
- Check template redesigned
- Online member payment portal finalized
- Live journal entries made on new system
- Live invoices posted for payment on new system
- First live check printed on new system
- Architectural Standards imported first projects and violations and validating data
- ASO imported first architectural projects and violations and validating data from old system to new
- Covenants violation types setup in eUNIFY

MAJOR PORTAL ACCOMPLISHMENTS

- Portal live for members
- Education/Change Readiness campaign in full swing
 - TD News Story in October, Dedicated Member Email, Nextdoor Post
- Setup login link on tahoedonner.com
- Member portal webpage updated with FAQs
- Training and workflow development with Member Services continue
- Testing with member homeowners in early October
- Adjusted layout of committee and financial documents based on user input
- Committee meetings added to calendar
- Loaded all board meeting documents back to 2019, additional to be added in the coming weeks

Extensive sign-up and education campaign in progress to all members .

QUESTIONS?

THANK YOU

