

The Legacy at Jordan Lake HOA Amenity Access Database & Distribution Policy

Effective Date: November 19, 2025

Approved by: Kory McLellan, President; Frank Perez, Treasurer; Jennifer Cox, Secretary; Rich St. Pierre, Member-At-Large/Assistant Treasurer

Administered by: Property Management Company (i.e., CAS)

1. Purpose

The purpose of this policy is to ensure the secure, efficient, and accountable distribution and management of clubhouse/gym/pool amenity fobs for all homeowners and residents within the Legacy at Jordan Lake community. This policy establishes procedures for requesting, processing, distributing, and maintaining the amenity database. This policy is in addition to the community rules and regulations.

2. Scope

This policy applies to all homeowners, residents, tenants, and authorized users who are eligible for controlled access to the clubhouse, gym, and pool.

4. Policies

- **Amenity Access Method Policy:**
 - Each property owner is eligible to receive amenity fob access credentials in accordance with HOA rules and regulations.
 - Amenity fobs should be transferred to new homeowners upon the sale of a property.
 - Unauthorized duplication or transfer of amenity fobs is strictly prohibited.
- **Gate Access Database Data Entry**
 - The Property Management Company (PMC) or a designated security vendor approved by the Board have the sole responsibility of maintaining the amenity access database, which includes controlled access to the gym, pool, clubhouse, and amenity center restrooms. Directors, nor volunteer homeowners, are to enter the amenity access database/system and view/maintain homeowner information. This is to protect the integrity of the database and private homeowner information.

5. Procedures

A. Request Submission

1. Homeowner/Resident Request:

- Complete the *Amenity Access Request Form* (available on the Resident Portal or by emailing the management office to request the form).

2. Submission:

- Email or deliver completed forms to the Property Management Company.
 - Requests are processed in the order received.
-

B. Processing by the Property Management Company

1. Verification:

- Confirm property ownership or lease authorization.
- Verify account standing (no outstanding HOA balances, unless otherwise permitted by board policy).

2. Database Entry:

- Follow the data entry process outlined by the security vendor.

3. Device Activation:

- Program new amenity fobs and update database as needed.
- Deactivate any devices reported lost, stolen, or associated with previous residents.

4. Record Retention:

- Maintain a digital record of all issued devices, updated in real time.
 - Retain forms for a minimum of three (3) years or per HOA policy.
-

C. Distribution of Access Devices

Once the request is approved and processed, homeowners may select one of the following distribution options:

1. Pickup Option:

- Devices may be picked up at a designated central location (e.g., Clubhouse).
- Pickup hours will be coordinated by the Property Manager.
- Photo identification *may* be required upon pickup, to confirm street address.

2. Mail Option:

- Residents may request mailing of amenity fobs to their property address on record.
- A small administrative/shipping fee *may* apply.

- The HOA is not responsible for devices lost or delayed in the mail; replacements *may* incur a replacement fee.
-

D. Replacement or Deactivation

1. Lost or Stolen Devices:

- Report immediately to the Property Management Company for deactivation and reissuance.
- Replacement fee applies as set by the HOA Fee Schedule for amenity fobs.

2. Change in Residency or Vehicle:

- Homeowners must notify the Property Management Company within 10 business days of a move-out.
 - Old credentials will be deactivated or reassigned to the new homeowner as applicable.
-

6. Annual Database Review and Audit

To maintain the integrity of the access system:

1. Annual Review Period:

- Each year, between January through March, the Property Management Company will initiate an *Access Verification Audit*.

2. Homeowner Verification:

- Homeowners will receive a notice requesting them to confirm their assigned access credentials.
- Residents must provide:
 - Amenity fob ID number(s)
 - Confirmation that each device is active and in use
 - Sign waiver that they have read the amenity usage guidelines for the pool, gym, and clubhouse within the Legacy rules and regulations. Amenity fobs may be deactivated if annual waiver is not signed.

3. Property Management Company Audit Process:

- Cross-check homeowner confirmations with the access database.

- Flag any unverified or inactive codes for review.
- Deactivate any devices not confirmed by the homeowner or not used within the prior 12 months (subject to HOA board approval).

4. Reporting:

- The Property Management Company submits a report of the annual audit findings to the HOA Board for review and recordkeeping.
-

7. Enforcement

- Unauthorized devices or misuse of access privileges may result in:
 - Fines or sanctions per HOA governing documents
 - Further action as deemed necessary by the Board, including amenity fob deactivation
-

8. Review and Updates

This policy shall be reviewed annually by the HOA Board and the Property Management Company to ensure effectiveness, security, and compliance with community needs. Regarding the above policy/procedure per the motion carried on November 19, 2025, this policy is carried indefinitely until amended by current or future boards with a carried motion.