

## **The Legacy at Jordan Lake HOA New Resident Information & Onboarding Process**

**Effective Date:** November 19, 2025

**Revision Date:** May 21, 2026

**Approved by:** Kory McLellan, President; Adrienne King, Vice President; Rich St.Pierre, Treasurer; Jay Schiestle, Secretary; Patrick Rorrer, Member-At-Large/Assistant Treasurer

**Administered by:** Property Management Company and Board of Directors

### **1. Purpose**

To ensure new residents in the Legacy at Jordan Lake receive timely, accurate, and complete information about the community, its governing documents, rules, fees, and points of contact.

This process promotes resident understanding, smoother transitions, and consistent communication between the HOA, the property management company, and the new resident.

### **2. Responsibility**

- The Property Management Company (PMC) is responsible for administering the onboarding process. The Welcoming Committee may assist with the process.
- The HOA Board of Directors oversees the process to ensure it aligns with community standards and governing documents.
- The new resident is responsible for reviewing all materials and providing any required forms or contact information.
- Homeowners are responsible for notifying the Property Management Company of a change of ownership or change of tenant(s).

### **3. Timeline Overview**

- **Notification of Sale**
  - Responsible Party: Title company / Realtor
  - When: Upon closing notification
  - What: Title company provides contact info for buyer and closing date to the Property Management Company.
- Change of tenant
  - Responsible Party: Homeowner
  - When: Any time that the tenants of a property change.
  - What: Homeowner notifies Property Management Company of a change of tenants. The notification should include acknowledgment that the tenant has received a copy of the Declaration, Bylaws, use restrictions, and rules and regulations of the community

- **Initial Outreach**

- Responsible Party: Property Management Company
- When: Typically, within 5 business days of notification
- What: Property Management Company sends a “Welcome Email/Package” with HOA and community information.
- The Property Management Company notifies the Welcoming Committee of the new residents.
- **Account Setup**
  - Responsible Party: Property Management Company
  - When: Within 5 business days, but not before closing date or change in tenants.
  - What: Property Management Company sets up residents in HOA database, billing, and communication systems.

- **Follow-Up**

- Responsible Party: Property Management Company
- When: Within 30 days
- What: Property Management Company confirms receipt of materials and answers questions. The Welcoming Committee may assist with follow up.

#### **4. Information Provided to New Homeowners**

The Welcome Packet (digital and/or printed) should include the following materials:

- Association Overview
  - Welcome letter from the Board or Property Management Company
  - Overview of the HOA’s purpose, structure, and management contact information
  - Summary of amenities and common areas
  - Office hours, contact phone number, and email for management
- Location of Governing Documents
  - HOA Declaration of Covenants, Conditions & Restrictions (CC&Rs)
  - Bylaws and Rules & Regulations
  - Architectural Review or Design Guidelines
- Financial & Administrative Information
  - Annual assessment amount and due dates
  - Payment options (online portal, check, auto-debit, etc.)
  - Late fee and collection policies
  - Budget summary and reserve fund explanation (optional for transparency)
- Communication Channels
  - Instructions for registering on the HOA’s online portal or management platform
  - How to sign up for community emails or text alerts
  - Social media or HOA website links (if applicable)

- Emergency contact information and after-hours procedures
- Link to Frequently Asked Questions
- Architectural & Maintenance Information
  - Procedures for submitting an Architectural Change Request (ARC form)
  - Summary of maintenance responsibilities (HOA vs. homeowner)
  - Landscaping, trash collection, parking, and pet policies
- Security & Safety
  - Overview of gate and amenity access systems
  - Information about surveillance camera policy

## **5. Communication & Follow-Up**

- Welcome Call or Email: The Property Manager contacts the new resident within the first two weeks to confirm receipt of materials and answer questions. This could be deferred to the Welcoming Committee.
- Database Update: The resident's contact info (email, phone, mailing address) is verified and entered into the HOA's communication and billing systems.
- Board Notification: The Property Manager provides a list of new residents to the Board in the monthly management report.
- Ongoing Engagement: New residents are added to all relevant communication lists and invited to upcoming community events or meetings.

## **6. Recordkeeping:**

The Property Management Company shall maintain records of communications with new residents.

These records should be securely stored and available for Board review upon request.

## **8. Related Policies**

This policy supersedes all prior Board motions governing new resident onboarding unless those motions are incorporated in an approved policy or procedure.

This policy is related to the Gate and Amenity Access Policy and the Legacy Community Facilities Policy.