

What I do in Operations!  
As of May 12, 2022

\*DISCLAIMER: IF AT ANYTIME YOU HAVE QUESTIONS & I AM IN THE OFFICE, PLEASE DO NOT HESITATE TO ASK ME!! I AM HAPPY TO BE OF ASSISTANCE!  
IF I AM OUT & YOU HAVE QUESTIONS ABOUT ANY OF THE TURN PROCESSES, YOU CAN ASK OTHER OPS PEOPLE ((or KARI (in Admin) as well since she did Turn before me))

*A Brief Description - in writing :)*

TURN \*Subject to change if we make the switch to Turnable

May 1 - October 31 move-outs = Summer Turn

November 1 - April 30 move-outs = Winter Turn

1. Create the Summer and Winter Turn Schedules for WL/L, Bloomington and Regional properties
2. Approve/Deny date change requests made by leasing/CLs and if approved, update the Turn Schedule accordingly
3. Evictions
4. Add the "Maintenance Totals" tab for each region with it listed by Unit per date
5. Assign WL/L vendors to unit Turns and update them accordingly
6. Create the maintenance work orders on Appfolio
7. Add my section to the "ISDR Mail Dates" sheet (Admin creates this), and follow up every Monday
8. Collect keys for WL/L vendors before and after Turn
9. Email tenants the "Move Out Reminder" email on Appfolio
10. Reply to ISDR Inquiries
11. Vendor Pay Discrepancies

INVOICES/WORK ORDERS/STATEMENTS/COI

1. Work with teammates for approving and uploading invoices to Smart Bill or statements to appropriate Appfolio account as we receive them via email
2. Go over and approve/question invoices when turned in physically by vendors
3. Upload work orders (mostly Koorsen) and update the "Lafayette Ops & Preventative Maintenance" sheet accordingly
4. Upload vendor insurance policies to their Appfolio account

MAINTENANCE NOTIFICATIONS

1. Maintenance techs will text me (on the Granite Maintenance phone) where they are going and why so that I can notify the tenants via Appfolio
2. Sometimes, the maintenance manager or supervisor will also ask me to email or text a tenant

ELEVATOR PERMITS

1. Renew them

## The Processes - in writing :)

### TURN: Creating the Turn Schedule

1. Make a copy of the previous Turn Schedule
  - a. Rename to current Turn year (ex. 2023 Summer Turn Schedule)
    - i. Winter will be “2022 Winter Turn Schedule”, copied from the 2021 Winter Turn Schedule
2. Delete all content but KEEP THE HEADERS (they’re highlighted pink and should stay formulated)
3. Copy the data from the MLG for each appropriate location, in alphabetical order by property
4. Edit the units as necessary
  - a. Renewals will be highlighted in blue
    - i. Put an “X” in the ‘M.WO#’ cell associated with that unit
    - ii. Type “Renewed through \_/\_/\_\_\_” in the ‘Move Out Inspection’ cell associated with that unit
      1. The “renewed through date” is the new 2023 MO date
    - iii. All other cells will be left blank

M.WO #	Property	Unit	Property Address	Lease To	Move Out Inspection
X	Ananda (TH)	5	1010 N. Salisbury Street, West Lafayette, IN 47906	08/01/2022	Renewed through 8/1/23

- b. AS-IS units will be highlighted in gray
  - i. Put an “X” in the ‘WO#’ cell associated with that unit
  - ii. Put “AS-IS” in the ‘Move Out Inspection’ cell associated with that unit
  - iii. All other cells will be left blank

M.WO #	Property	Unit	Property Address	Lease To	Move Out Inspection
X	Andrew Place	9	136 Andrew Place, West Lafayette, IN 47906	07/22/2022	AS-IS

- c. Vacant units will be unhighlighted, but the text will be red
  - i. Put “VACANT” in the ‘Lease To’ cell associated with that unit
  - ii. All other cells will be left blank

M.WO #	Property	Unit	Property Address	Lease To
	Crosswalk Commons (F)	302 B	925 Hilltop Drive, West Lafayette, IN 47906	VACANT

5. If there are IL units, you will need to add an additional row, after the last bedroom, for the Common Area
  - a. If one tenant in an IL renews, or the future takes it “AS-IS” we will NOT turn the Common Area and it will need to be marked accordingly (match the room that renewed, signed AS-IS)

Property	Unit
Nova	309 A
Nova	309 B
Nova	309 Common

6. Add the dates for each column for the units needing to be Turned (the formulas can be dragged down the entire sheet, and be adjusted as needed for each unit!!)

- a. Lease To: The move out date (confirm on Appfolio)
- b. Move Out Inspection: The next business day following the “Lease To” date
- c. Painting-Start: This will be formulated to the next business day following the “Move Out Inspection” date
  - i. “=column letter of move out inspection row number+1”

G1466		fx		=F1466+1	
	A	B	C	F	G
1	M.WO #	Property	Unit	Move Out Inspection	Painting - Start
1466	139995	Memphis (F)	510 C	08/01/2022	08/02/2022

- d. Painting-End: This will be formulated to the next business day following the “Painting-Start” date
  - i. “=column letter of painting-start row number+3”

H1466	fx   =G1466+3					
	A	B	C	F	G	H
1	M.WO #	Property	Unit	Move Out Inspection	Painting - Start	Painting - End
1466	139995	Memphis (F)	510 C	08/01/2022	08/02/2022	08/05/2022

- e. Cleaning-Start: This will be formulated to the next business day following the “Painting-End” date
  - i. “=column letter of painting-end row number+1”

I1466	fx	=H1466+1			
	A	B	C	H	I
1	M.WO #	Property	Unit	Painting - End	Cleaning - Start
1466	139995	Memphis (F)	510 C	08/05/2022	08/06/2022

- f. Cleaning-End: This will be formulated to the next business day following the “Cleaning-Start” date
  - i. “=column letter of cleaning-start row number+3”

J1466	fx	=I1466+3			
	A	B	C	I	J
1	M.WO #	Property	Unit	Cleaning - Start	Cleaning - End
1466	139995	Memphis (F)	510 C	08/06/2022	08/09/2022

- g. Flooring Replacement: Leave this blank. Maintenance/Ops will go through the units not renewing to inspect the floors at a later date. If carpets/vinyl need to be replaced, we will schedule with the contractors and put those dates here. The schedule will be adjusted as needed.
- h. Carpet Cleaning-Start: This will be formulated to the next business day following the “Cleaning-End” date
  - i. “=column letter of cleaning-end row number+1”

L1466		<i>fx</i>	=J1466+1			
	A	B	C	J	K	L
1	M.WO #	Property	Unit	Cleaning - End	Flooring Replacement	Carpet Cleaning - Start
1466	139995	Memphis (F)	510 C	08/09/2022		08/10/2022

- i. Carpet Cleaning-End: This will be formulated to the next business day following the “Carpet Cleaning-Start” date
  - i. “=column letter of carpet cleaning-start row number+1”

M1466	<div><div><div></div><div>fx</div></div><div>=L1466+1</div></div>				
	A	B	C	L	M
1	M.WO #	Property	Unit	Carpet Cleaning - Start	Carpet Cleaning - End
1466	139995	Memphis (F)	510 C	08/10/2022	08/11/2022

- j. Maintenance: This will be formulated to the next business day following the “Carpet Cleaning-End” date
  - 1. Make sure the maintenance date falls on a weekday and not on a holiday (office closed)
    - a. If it falls on a weekend or holiday where we will not be working, you will need to adjust the schedule for other vendors to make it so that it does
  - ii. “=column letter of carpet cleaning-end row number+1”

N1462		<i>fx</i>	=M1462+1			
	A	B	C	M	N	
1	M.WO #	Property	Unit	Carpet Cleaning - End	Maintenance	
1462	139978	Memphis (F)	501 C	08/11/2022	08/12/2022	

- 1. \*\*This column can be changed to “Maintenance-Start” for the new 2022 Winter/2023 Summer Turn Schedules
- k. Final Inspection-Start: This will be formulated to the next business day following the “Maintenance” date
  - i. “=column letter of maintenance row number+1”

O1462		<i>fx</i>	=N1462+1			
	A	B	C	M	N	O
1	M.WO #	Property	Unit	Carpet Cleaning - End	Maintenance	Final Inspection - Start
1462	139978	Memphis (F)	501 C	08/11/2022	08/12/2022	08/13/2022

- 1. \*\*This row can be removed completely for the new 2022 Winter/2023 Summer Turn Schedules
- l. Final Inspection-End: This will be formulated to the next business day following the “Final Inspection-Start” date
  - i. “=column letter of final inspection-start row number+1”


P1462		fx		=O1462+1			
	A	B	C	M	N	O	P
1	M.WO #	Property	Unit	Carpet Cleaning - End	Maintenance	Final Inspection - Start	Final Inspection - End
1462	139978	Memphis (F)	501 C	08/11/2022	08/12/2022	08/13/2022	08/14/2022

- |       |                                  |             |       |                       |             |                          |                        |              |              |  |
|-------|----------------------------------|-------------|-------|-----------------------|-------------|--------------------------|------------------------|--------------|--------------|--|
| R1462 | =if(Q1462>=P1462,"warning", " ") |             |       |                       |             |                          |                        |              |              |  |
|       | A                                | B           | C     | M                     | N           | O                        | P                      | Q            | R            |  |
| 1     | MWO #                            | Property    | Unit  | Carpet Cleaning - End | Maintenance | Final Inspection - Start | Final Inspection - End | Move In Date | Date Warning |  |
| 1462  | 139978                           | Memphis (F) | 501 C | 08/11/2022            | 08/12/2022  | 08/13/2022               | 08/14/2022             | 08/17/2022   |              |  |

- ## TURN: Approving/Denying Date Change Requests, Adjusting the Schedule When Needed

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- i. “Working with \_\_\_\_ to move this date to \_/\_/\_\_\_”

Move In Date	Date Warning
08/05/2022	 <b>Kascha Fickle</b> 9:58 AM May 3 working with Kylie to move up to 8/3
08/08/2022	
08/08/2022	
08/08/2022	
08/08/2022	

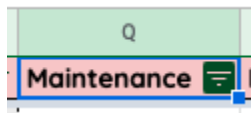
- d. If approved, reply to the email and add Admin (so that they’re aware when processing the lease and won’t make it an error). I cannot adjust the Turn Schedule until the lease has been signed and processed by Admin (this is the reason I leave a note)
  - e. If it’s not approved, reply to the email giving the bad news...  
#dundunduunnnnn
  - f. THE LATEST A LEASE CAN BE EXTENDED TO FOR A SUMMER TURN IS 7/30
  - g. THE LATEST A LEASE CAN BE EXTENDED TO FOR A WINTER TURN IS 12/20
2. When a renewal lease, a lease release, an AS-IS addendum, or DBA, etc. comes through for processing, Admin will email me to let me know. This is important so that I can update the schedule as needed.
    - a. I like to compare the email with Appfolio to make sure it’s correct before I do anything with the Turn Schedule. If what’s listed in the email does not match what’s on Appfolio, I will email Admin back to confirm (sometimes the wrong unit is listed or a date on Appfolio has not been adjusted)
    - b. Renewals: Again, I highlight the row in blue. I will then move it down with the other renewals, and make sure it’s in order by property - then unit.
      - i. After it’s highlighted and down where it should be, I delete the row where it was, and then go back to the unit to delete the scheduled dates from “Painting-Start” through “Move In Date”.
      - ii. After I delete the dates, I will follow steps from above (#4a under “TURN: Creating the Turn Schedule”)
    - c. AS-IS: basically the same process as renewals...
    - d. Lease Release: Change the “Lease To” date and move this row accordingly (with the other units that move out on this same day, or at lease in numerical order by date) \*don’t forget to delete where it came from\*
      - i. Change the “Move Out Inspection” date (the dates behind will change automatically since they’re formulated)
    - e. DBA: basically the same as releases...
  3. Once it’s processed by Admin and I’m adjusting the Turn Schedule, I will make sure the MLG/Available Now are updated accordingly as well

### TURN: Evictions

1. When we are evicting a tenant, Trish (accounts collections) will send a calendar invite for it with the date and time the tenant is being evicted
2. I will keep the invite in my inbox until the day of the eviction
3. On the day of the eviction, I will wait until the time to add it to the Turn Schedule
  - a. Before I add it to the schedule, I will check the tenant's Appfolio account to make sure the tenant has not made a payment in order to not be evicted
    - i. If the tenant did not make a payment, I will add it to the schedule
    - ii. If the tenant did make a payment, I will reply to the invite and ask Trish how to proceed
4. Adding the unit to the Turn Schedule
  - a. Make sure it's in alphabetical order by property, numerical order by unit, then numerical order by inspection date
    - i. For evictions, the inspection date will ALWAYS be the same day the tenant is being evicted
  - b. Drag the scheduled dates and assign it to the vendors who Turn the property (if WL/Bloomington), the CLs will assign their vendors
    - i. Lexi (ops specialist) in Bloomington, should already have her vendors documented on the schedule the same I do here in WL
  - c. Make sure painters and cleaners have 4 days, carpet cleaners have 2 days, and maintenance has 3 days
    - i. Again, these dates may need adjusted to make sure the date on the "Maintenance" column falls on a weekday
  - d. Enter in the next available Move In Date (if there's not already a new lease signed)
    - i. Add this unit and dates to the Available Now or MLG accordingly
5. When it's scheduled, create the maintenance work order on Appfolio and do whatever needs to be done in Turnable (again, I'm not there yet...)
  - a. Don't forget to add the wo# to the schedule once it's created
6. Add this unit to the total #s on the maintenance tab on the schedule
7. Select "Yes" to the calendar invite and 'reply all'
  - a. I will typically reply thanking Trish and then address whoever needs to be addressed to let them know I added the unit to the Turn Schedule and that the inspection is for today (because I create it the day of)
    - i. If it's a regional property, I will address the CL associated
    - ii. If it's a Bloomington property, I will address Lexi
    - iii. If it's a WL/L property, I will just reply to Trish and then vocally tell the inspector here. I will also have to notify the vendors that we added a unit and give them their scheduled dates

### TURN: Maintenance Totals

1. Create the tab and title it "Maintenance Totals"
2. On the sheet, create two columns for West Lafayette properties, three columns for Regional properties, and two columns for Bloomington properties
  - a. The first column will be "Date" for each region
  - b. The second column for West Lafayette and Bloomington will be "# of Units"
  - c. The second column for Regional will be "# of Units"
  - d. The third column for Regional will be "Properties"
3. For West Lafayette and Bloomington properties, filter through the "Maintenance" dates and list those dates in the "Date" column on the 'Maintenance Totals' tab
  - a. To filter, click the "filter" button on the 'Maintenance' cell



- b. Click on Clear
- c. Only select the dates one at a time (I found this to be easiest, but you do what you think is best)
- d. Count the number of UNITS associated with that date and document it on the "Maintenance Totals" tab

WEST LAFAYETTE		BLOOMINGTON	
Date	# OF UNITS	Date	# OF UNITS
5/20/22	2	5/20/22	1
5/24/22	1	5/23/22	1
5/27/22	1	5/27/22	1

4. For Regional properties, it's basically the same thing, but when you're adding the number of units to the "Maintenance Totals" tab, you will need to note how many of those units are at each location

REGIONAL		
Date	# OF UNITS	PROPERTIES
5/13/22	2	A56-1 // COL-1
5/20/22	1	Mar-1
5/23/22	1	mem-1
5/25/22	4	rFL-4
6/6/22	2	Lima-2
6/9/22	2	rFL-2
6/10/22	20	Mar-1 // Mem-6 // rFL-12 // VINC-1
6/13/22	11	BeLF-4 // DarB-3 // OSH-1 // VINC-3

- a. I do this so that it's easier for maintenance managers to schedule the techs to be where on that day
  - i. If there are 100+ units scheduled for 1 specific day, I will make the "date" and "# of units" texts in red so that maintenance is flagged that it's a heavy work day



5. I try to even out the dates, and adjust the schedule so that there aren't too many "heavy work days".
  - a. Most of the time, there will be at least 1 day where there are over 100 units Regionally. If this is the case, I will make sure to adjust the schedule for West Lafayette to make there be 0 maintenance work orders on the same day as the heavy day regionally - this is so our maintenance techs can travel without worrying about local turns...

### TURN: Assigning WL/L Vendors

1. Since I've been in this position (2 Summer Turns, 1 Winter Turn) we have used the same Turn Vendors (some of which we will not call back, and in doing so ask the others if they would pick up those properties)
  - a. We only used 2 vendors for 2021 Winter Turns
2. On the 2022 Winter / 2023 Summer Turn Schedules for West Lafayette/Lafayette, there will be columns titled "Painter", "Cleaner" and "Carpet Cleaner" - they will be behind each section accordingly

G	H	I
Painting - Start ▾	Painting - End ▾	Painter ▾

J	K	L
Cleaning - Start ▾	Cleaning - End ▾	Cleaner ▾

Carpet Cleaning - Start ▾	Carpet Cleaning - End ▾	Carpet Cleaner ▾
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3. Those cells (the vendor cells) should be highlighted a dark gray color and I will enter in the name of the vendor for each property they did last Turn season
  - a. For 2022 Winter, I will refer to the 2021 Winter Turn Schedule
  - b. For 2023 Summer, I will refer to the 2022 Summer Turn Schedule
4. Once that is done, I will filter through the properties of the vendors we decide we will not reuse and leave those cells blank
5. Print out copies for each vendor of their scheduled units for them to confirm they are still comfortable with those properties
  - a. For 2022 Summer, we started with 1 vendor - this is because I also printed out a copy of the schedule that do not have vendors assigned and ask that 1 vendor if they would like to take some of those properties
    - i. If they do, I will then add them to those units on the schedule and repeat for the second vendor (print out their assigned schedule, then ask if they want to pick up any others -- minus the ones the first vendor is now assigned to)
  - b. Once a vendor confirms, I will highlight their cell from "dark gray" to "light gray", indicating that those are for sure assigned

6. Once every property and unit has vendors assigned to them, I will typically wait until the middle of April to give them their most updated schedule.
  - a. If there are any changes to the schedule after I have given them their last copy, and Turn has officially began, I will have to contact the vendors and notify them of the changes - I will NOT reprint or resend a new copy every time something changes (that would take entirely too much time)

#### TURN: Creating Maintenance Work Orders on Appfolio

1. Every unit will need to have a maintenance turn work order - this is where maintenance will add their time and any parts they've replaced/fixed. Admin will use this information to add the charges to the ISDR (Itemization of Security Deposit Return)
2. Referring to the "Maintenance Column" on the Summer Turn Schedule, start at the top and work your way down so that the earlier dates are created first!
3. On Appfolio, go to the unit (in my example below, I will start with Scholar Place #6)
  - a. From here, I will check to make sure the dates I have listed on the schedule for "Lease To" and "Move In" match those on Appfolio
    - i. If they do, great.
    - ii. If they don't, bummer. I will have to look into the issue and edit as needed (sometimes I have the schedule wrong, sometimes Appfolio is wrong)
  - b. Once the dates match, I will click on the "Current Tenants" name and it will take me to their account
  - c. On the far right, click on "New Service Request"
  - d. Change the Work Order Type from "Internal" to "Unit Turn"
  - e. Check "Yes" under Permission To Enter
  - f. In the box for Description, enter in the unit type
    - i. For Scholar Place #6, it's 1-bed/1-bath
      1. If it's an IL, will add "IL" at the end
      2. If it's a Common Area, add "Common Area" at the end
        - a. Common Area work orders will be entered in for the tenant in bedroom A (this is so it's consistent for Admin when processing ISDRs)
  - g. In the box for Job Description, remove the unit type and enter the dates
    - i. For Scholar Place #6, type "Maintenance: 5/24/22"
      1. If there is a later date in the cell on the column for "Final Inspection-End" on the schedule, type "Maintenance: 5/24/22 - \_/\_/\_". That way maintenance knows they have more than 1 day to complete the work order
    - ii. If it's a Common Area, add "Common" behind "Maintenance". It will look like this: "Maintenance Common: \_/\_/\_ - \_/\_/\_\_\_". This is to

indicate to maintenance technicians that there are not duplicate work orders for bedroom A, but rather two separate ones (1 for the IL, 1 for the Common Area)

- h. Change the Unit Turn Category to “Maintenance/Repair”
  - i. Click “Save”
  - j. Enter the work order number listed on the work order to the schedule in the cell on the “M.WO#” column for that unit
    - i. For Scholar Place #6, the work order # is 141880
    - ii. We do this so that it’s easier to search the work order associated with that unit
4. If there are any changes to the lease that the schedule is being updated for, I will have to also update the work order!
- a. If a tenant renews, I will cancel the work order and type “renewed” when prompted to give a reason for cancellation
  - b. If a tenant signs an AS-IS addendum, I will cancel the work order and type “AS-IS” when prompted to give a reason for cancellation
  - c. If I have to adjust the dates on the schedule, I will also have to make sure to adjust the dates on the work order so that they match
  - d. So on and so on...

### TURN: Adding My Section to the ISDR Mail Dates Sheet

\*This is BEFORE Turnable, so this may not apply to this position any longer (not yet trained on Turnable at this time)

1. My section of this sheet is for reference to ensure Turn is being completed on time and the vendors are being paid timely
  - a. At the end of the sheet, you will see headers for “VP Painting”, “VP Cleaning”, and “VP Flooring” (VP = Vendor Pay) and they’re highlighted a dark teal color

Property	Unit	Tenant	ADJ Mailed	VP Painting	VP Cleaning	VP Flooring
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2. Under each column, I will add checkboxes and drag them alllllll the way down to the last unit listed
  - a. I use the checkboxes to indicate when the Turn has been completed for each section and the vendor can be paid

VP Painting	VP Cleaning	VP Flooring
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- b. If a unit has renewed I will delete the checkboxes, highlight the cells the same dark teal color, and type in “Renewed” for each section

VP Painting	VP Cleaning	VP Flooring
Renewed	Renewed	Renewed

- c. If a unit has an AS-IS addendum, I follow the same as a renewal except I'll type in "AS-IS"
- d. If a unit is vacant I will delete the checkboxes, highlight the cells a light teal color, and type in "v" for each section, including the cell to the right of the flooring

VP Painting	VP Cleaning	VP Flooring	
v	v	v	v

- e. If it's a joint unit, only the first tenant row will need the checkboxes and I will just delete the checkboxes for the other tenants, highlight the cells the dark teal color and type a " - "

VP Painting	VP Cleaning	VP Flooring
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-	-	-
-	-	-

- f. If it's an IL and we are turning the Common Area, I will make myself a note on the first checkbox cell for room A saying "Do Not Forget the Common Area"

3. In the cell to the right of flooring (with checkboxes only), I will add the last scheduled date (this is the "Final Inspection-End" date on the Turn Schedule)

VP Painting	VP Cleaning	VP Flooring	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	M: 8/6
-	-	-	
-	-	-	

- a. The following Monday from this date, I will check to make sure the turn is completed.
  - i. If the inspector indicates that nothing needs to be Turned, then I will delete the checkboxes, type in "None Needed" and highlight the cells dark teal (any other notes will be listed this way as well; Pointe West properties will say "PW", FaciliTech properties in Bloomington will say "FaciliTech", etc.. )

VP Cleaning	VP Painting	VP Flooring
None Needed	None Needed	None Needed

- ii. If it is completed, I will check the box and highlight that cell the dark teal color
- iii. If it is not completed, I will leave the box unchecked and make a note that I have emailed the appropriate person to confirm the status of the turn.

M: 5/8	Kascha Fickle 8:11AM May 9 emailed Patience and Andrew

1. To the right of that date, I will then add “fu on \_/\_” (fu = follow up, and the date will be the following Monday) and highlight that cell a pale yellow

VP Cleaning	VP Painting	VP Flooring		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	M: 5/8	fu on 5/16

- iv. After following up 3 times, if one (or any) of the vendors never complete the turn, I will highlight the cells the light teal color and notate “canceled”. (also delete the “follow up” cell and change it back to white

VP Cleaning	VP Painting	VP Flooring		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Kascha Fickle 9:26AM Mar 28 Emailed Charles
PW	PW	PW		
PW	PW	PW		Kascha Fickle 10:39AM Apr 6 Followed up
Renewed	Renewed	Renewed		
PW	PW	PW		Kascha Fickle 8:42AM Apr 11 Followed up for the last time - will cancel next week
PW	PW	PW		
PW	PW	PW		
None Needed	None Needed	None Needed		Kascha Fickle 9:31AM Apr 18 canceled
None Needed	None Needed	None Needed		
<input checked="" type="checkbox"/>	None Needed	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

VP Cleaning	VP Painting	VP Flooring		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

4. If there are any changes to the lease that the schedule is being updated for, I will have to also update these cells

### TURN: Collecting Keys for WL/L Turn Vendors

1. When the vendors have a scheduled day/time to come in to sign the Turn Pricing Agreement associated with the specific Turn season, I will need to make sure I have all of the keys collected for their specific properties (that way they do not have to make multiple trips to the office)
  - a. Each vendor will receive 1 copy of the master key for each property they're assigned to
  - b. I will make sure that the keys have key tags with the name of the property listed, and the door code to the property, if applicable

### TURN: Move Out Reminder email to tenants

1. In the middle to the the end of the current month, I will send an email to the tenants moving out the following month
  - a. On Appfolio, go to “Communication”
    - i. Click on “Letters”
    - ii. Scroll down and click on “Move out Reminder Test”
  - b. Using the schedule, filter it to find all of the units moving out the following month (if it’s currently May, filter to locate the June move outs)
    - i. Enter those properties on Appfolio
      1. Check the box so that you’re sending separate emails & letters to each tenant
      2. Uncheck the “Amount Owed” box
      3. Click “search”
  - c. When the new screen pops up, click on “None” for both Email and Letters
    - i. Only check the boxes of the units moving out (this is tedious but this is the only way I know how to do it)
    - ii. Click “Email” at the bottom
    - iii. Change the subject of the email to “GraniteSL - Move Out Reminder”
    - iv. Click “Send”
  - d. Filter the schedule back to the way it was


### TURN: Reply to ISDR Inquiries

\*\*Emhardt and FaciliTech properties will need to be approved by THEM for any adjustments.

1. Once the ISDRs have been mailed, the tenants have a chance to dispute any charges listed on their ISDR (or, if they never receive their ISDR they are given the link to submit an inquiry to check on the status of said ISDR)
2. On the Turn Schedules, there will be a tab titled “ISDR Inquiries”. This is where each inquiry will be filtered to for a response

A	B	C	D	E	F
Timestamp	Email Address	Resident Name	Property Address	Unit Number	Complaint/Question

3. Sometimes, the inquiries will be for different Turn seasons so I leave a comment and highlight each inquiry a different color

Timestamp	Email Address	Resident Name
5/10/2022 11:35:50	 Kascha Fickle 11:37 AM Yesterday	✓
	The GREY highlight = tests/not an ISDR Inquiry	
	The ORANGE highlight = Past turns	
	The TEAL highlight = Summer 2022 Turns	

- a. At times, there may be multiple of you replying - we will use different colors to indicate who replied to which inquiry. I personally use orange and teal (as of right now, I'm the only one replying to inquiries so I only commented my colors - but this can be edited accordingly)
4. Sign into the ISDR Appfolio account when replying to tenants so that it does not come from your personal email and when they reply, the response will come to the ISDR email!
5. When looking into/investigating an inquiry, you will want to make sure you are looking at every possible note, photo/video documentation, everything to give a proper reply.
  - a. If an adjustment is made, you will want to explain why and list what is being adjusted.
    - i. Adjustments will need to be emailed to Admin, so they can create/process the adjustment
      1. What is being adjusted will need to be explained so that Admin knows what adjustments specifically are being made
  - b. If we will not make adjustments, you will need to explain why and provide all proof that the charges are fair and will remain.
6. If the inquiry is about reissuing the check to another address, you will need to let Brody and Kari know.
  - a. The new address will need to be listed in the email to Brody and Kari so that they can make the updates on their end
  - b. Brody and Kari will need to know if the reissue fee will be paid by the tenant (taken from the deposit) or if was a mistake by Granite and Granite needs to pay (someone updated the address incorrectly originally, etc)
7. A couple of examples below via screenshots of conversations (blacked out is the tenant's name and address)

Ex. 1 (an adjustment was given)

Complaint/Question				
--------------------	--	--	--	--

I do not understand why you took my security deposit and then had the audacity to ask for money that I should not be charged for? What kind of painting costs \$400?? I am honestly so frustrated and need a complete break down of the bill so I can refute this with someone.

View Email

To: [REDACTED]

Bcc:

From: isdr@granitesl.com

Subject: ISDR Inquiry Reply / Oshkosh 430 / [REDACTED]

Message:

Hello [REDACTED]

We received your inquiry in regards to the painting costs on your ISDR. Attached is the painting work order for your unit showing the costs per item that you were charged for. However, we are unable to secure photo documentation of the walls that were painted. Therefore, we will remove this charge.

Your adjusted ISDR will be mailed to [REDACTED] If you wish for it to be mailed to an alternative address, please let us know ASAP.

Kind regards,  
Granite Student Living

Ex. 2 (2 inquiries submitted, no adjustment given)

Complaint/Question				
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In our itemization of our security deposit return it mentions a \$315 full paint cost. What is the reason behind this? This was not a re-paint fee which would assume we painted a wall and your team needed to hire a professional to come in and repaint. It's also a routine task that must be done every few years, which is out of our control and should not be charged \$315 for it.

Complaint/Question				
--------------------	--	--	--	--

My second issue with the ISDR is the breakdown of our deposit. I paid \$500 before I moved in but on this form it says I paid \$326. What is the reason behind this?

View Email

To: [REDACTED]

Bcc:

From: isdr@granitesl.com

Subject: ISDR Inquiry Harrison Commons 10 [REDACTED]

Message:

[REDACTED]

The \$315 painting charge was based on the work needed to restore the unit to the condition it was in when your lease started. We did take into consideration the longevity of the walls and only charged you 75% of the actual cost.

Per your lease, you paid a \$376 deposit and \$99 non refundable admin fee.

Kind regards,  
Granite Student Living

TURN: Helping Accounting with Vendor Pay Discrepancies

1. If a vendor has a question about a payment, I will help accounting look into it and fix if needed



## INVOICES

1. When a contractor or vendor emails an invoice to [ops.invoices@granitesl.com](mailto:ops.invoices@granitesl.com), either myself or another teammate will take care of this
  - a. We will look at the invoice and make sure the pricing is fair, that the property and unit (if applicable) and a description of what was done is noted
  - b. If approved, we will “reply all” to the email, saying something like “Thank you” (this lets everyone know it’s been received and taken care of) and then forward the email to Smart Bill Entry on Appfolio for accounting
    - i. [granitesl@invoices.appfolio.com](mailto:granitesl@invoices.appfolio.com)
2. When a contractor or vendor turns in an invoice personally, they typically are given to me
  - a. I will look over the invoice, same as if it’s been emailed
  - b. If approved, I will initial it and put the date I’m approving it, and then indicate whether it’s a tenant charge or if the property owner will be paying
    - i. Most of the time it’s a property owner charge, but if it is a tenant charge it will be for the following reasons:
      1. Cleaners were sent in to clean because they were not keeping their unit clean
      2. Pest control was sent because of something the tenant has caused, but only if we can prove it
      3. A third-party contractor was sent in to make repairs out beyond what our maintenance staff can do and it was damage caused by the tenant (very rare)
  - c. Give to someone in accounts payable

## WORK ORDERS

1. Koorsen will turn in pink or yellow slips - these are their work orders.
  - a. Update the “Lafayette Operations & Preventative Maintenance” sheet according to what was done
    - i. If it’s Koorsen (most of the time it is), go to the “building” tab on the sheet
    - ii. Find the property it’s for and highlight the row
    - iii. Scroll sideways until you find the “fire” columns
    - iv. Enter in the date the work was done for each respective service
  - b. Scan them in to my email
    - i. Title it “property name\_initial for work completed\_Koorsen”
      1. FA = fire alarm inspections/testing
      2. BF = backflow inspections
      3. S = sprinkler inspections
      4. FE = fire extinguishers inspections/replacements
      5. EL - Emergency Lights

- c. Upload to the property account it's for into the file folder "Fire" at the bottom of the page

### STATEMENTS

1. When a contractor or vendor emails, mails, or physically turns a statement (most of the time they email it to [ops@granitesl.com](mailto:ops@granitesl.com) or [ops.invoices@granitesl.com](mailto:ops.invoices@granitesl.com)), either myself or another teammate will take care of this
  - a. Upload it / scan it in and download to the property Appfolio account it's for.
    - i. If it's for a specific unit, upload it to that unit account on Appfolio

### COI: Certificate of Insurance

1. Vendors and contractors will mail, email or physically turn in copies of their COI
  - a. If emailed in: reply "all" so that everyone on the team knows it's taken care of. Download it to your computer, then upload it to their Appfolio account.
    - i. You may need to rename it, if you do - it can be as simple as "vendor name\_COI\_year it's active for"
  - b. If mailed or physically turned in: scan it in to your email, rename it, and then upload it to their Appfolio account

### MAINTENANCE NOTIFICATIONS

1. I will send the following text accordingly
  - a. I will typically send a text if I'm only notifying 1-5 units

This is Granite Maintenance. Your service request is next in the queue. Someone should be there shortly to address your request. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

This is Granite Maintenance. Your roommate's service request is next in the queue. Someone should be there shortly to address the request. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

This is Granite Maintenance. Please disregard the last text you received from us. It was sent by mistake. We apologize for the miscommunication. (DoNotReply)

This is Granite Maintenance. Your service request has been assigned. The maintenance tech will address your request tomorrow. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

This is Granite Maintenance. Your service request has been assigned. We have you on the 24-hour notice list, but due to the urgency of the work someone will be by shortly. Please call ASAP to let us know if you have any COVID symptoms. Thank you! (DoNotReply)

This is Granite Maintenance. We will be performing common area maintenance at your location and will need to enter your apartment. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

This is Granite Maintenance. We will be stopping by to address some issues from the annual inspection. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

This is Granite Operations. We will be stopping by for common area inspections today and may need to enter your apartment. Thank you! (DoNotReply)

This is Granite Operations. Someone with our painting contractor should be there shortly to make repairs to your unit. Please call to let us know if you have any COVID symptoms ASAP. The personnel will lock your apartment door when complete. Thank you! (DoNotReply)

## 2. I will send the following email accordingly

### a. I will typically send an email if it's to the entire property

Dear Granite Resident,  
We have changed the entry code to your apartment building. Please use the new code (--) from here on out! Thank you. (DoNotReply)

Dear Granite Resident,  
Our maintenance team will be stopping by during business hours today to replace furnace filters. You do not need to be present. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

Dear Granite Resident,  
The water will be shut off shortly due to necessary maintenance that requires immediate attention. We apologize for the inconvenience and will have the water back on as soon as we can! Thank you for your patience and understanding. (DoNotReply)

Dear Granite Resident,  
We are happy to inform you that your water has been turned back on. We recommend running your cold water faucets until the water runs clear! Thank you for your patience during this time. Have a great day! (DoNotReply)

Dear Granite Resident,  
Our maintenance team may be stopping by during business hours today to check the water usage. Please call ASAP to let us know if you have any COVID symptoms. The Granite technician will lock your apartment door when complete. Thank you! (DoNotReply)

## 3. Sometimes, I do not have the appropriate text/email to send so I will have to just come up with one on the spot

### a. Keep it simple and vague with just enough information

## 4. If a tenant has the following, I will notify the maintenance tech to let them know

- i. These will be located behind the unit on the tenant's Appfolio account

Summary

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**Nova - 312 A - HT** | 200 S. 4th Street - 312 A - HT, Lafayette, IN 47901

- b. (24 hr): This means that this tenant requires a 24-hour notice before we enter their unit
- c. (K9): This means that the tenant may have an aggressive dog and to take precautions before going to their unit
- d. (Q-\_/\_/\_\_): This means that the tenant is quarantined due to Covid and we will not be able to enter until after the quarantine is lifted
  - i. The date provided is the day they tell us (so however many days after that date is when we can enter)
- e. (HT): This means that the tenant is hostile and that maintenance will need to find a buddy to go with
  - i. We don't send only 1 tech to an HT unit

### ELEVATOR PERMITS

1. We have elevators at some properties, locally and regionally, that will need permits to be renewed yearly
  - a. I keep a post it note stuck to the bottom of my computer with a list of properties and the dates they need to be renewed for as a reminder
2. Go to the DHS Portal login page and sign in
  - a. Operations has the login information and the link to access the page
3. Once logged in:
  - a. Click on "My Permits"
  - b. Click on "Expiring Soon"
  - c. Find the elevator you need to renew

LD150106C Status: Active <a href="#">Remove from account</a>	Building Name: NORTH BY NORTHWEST APTS. Lift	GRANITE MANAGEMENT COMPANY 20 N. SALISBURY STREET SUITE A WEST LAFAYETTE, Indiana 47906 Map  (765) 412-0380 operations@granitesl.c om	NORTH BY NORTHWEST APTS 225 Northwestern Avenue West Lafayette, Indiana 47906 Tippecanoe County Map	Lift/Elevator Operating Status: Active 06/19/2021 to 06/18/2022  Last Safety Test Date(s) Annual: 03/18/2022	Action ▾
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- d. Click "Action"
- e. Click "Renew"
- f. Select "Credit Card" as the payment method
- g. Click "Checkout"

- h. Enter in the Customer Information
  - i. First Name: Granite
  - ii. Last Name: Management
  - iii. Company Name: Granite Student Living
  - iv. Address: 225 Northwestern Avenue
  - v. Address 2: Suite A
  - vi. City: West Lafayette
  - vii. State: IN - Indiana
  - viii. ZIP/Postal Code: 47906
  - ix. Phone Number: 765-269-7283
  - x. Email: [ops.invoices@granitesl.com](mailto:ops.invoices@granitesl.com)
  - xi. Click Next
- i. Get the operations credit card from manager and enter in the information
  - i. Name on Credit Card: Granite Operations
- j. Click Next
- k. Confirm the information is correct and check the box that says "I'm not a robot" - then click "Submit Payment"
- l. Click on "My Dashboard" once the page reloads
- m. Click on "My Permits"
- n. Click on "Expiring Soon"
- o. Find the elevator you just renewed
- p. Click "Action" then "Download PDF"
  - i. Open the PDF, print it, then download it again (I like mine to be downloaded to my desktop the second time)
  - ii. Upload to the property page into the "Elevator" file at the bottom
    - 1. I keep also keep a file folder of the printed permits to show when they expire in case my post-it note gets lost or I forget to update it - I can refer to the printouts in the file folder as a reminder as well (I keep them in order by expiration date)
- 4. Log out of the portal and close the window
- 5. Give the credit card back to whom you got it from
- 6. You can ignore the "Payment Receipt Confirmation" email

24-7@dhs.in.gov via granitest.com  
to ▾

2:51 PM (3 minutes ago)

### Payment Receipt Confirmation

Your payment was successfully processed.

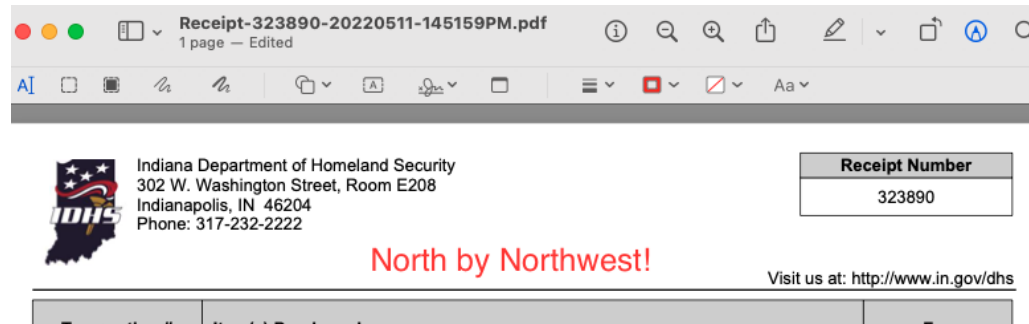
#### Transaction Summary

Description	Amount
	\$128.40
Service Fee	\$3.58
Total Amount Paid	\$131.98

#### Transaction Detail

SKU	Description	Unit Price	Quantity	Amount
4608	Lift Device Operating Permit	\$120.00	1	\$120.00
IOT_PortalFee	Technology Fee	\$8.40	1	\$8.40
	Service Fee	\$3.58		\$3.58
				\$131.98

7. The DHS Public Receipt email from “psp” will contain a pdf
  - a. Download the pdf and note the property it’s for using Preview (should pop up when you open it from your desktop)



8. Log-in to Tallie (again, operations has the login info)
  - a. Click on the paperclip icon to “upload a receipt”
  - b. Select the pdf you just downloaded and click “open”
  - c. Click on the dropdown area attached to the receipt you just uploaded
    - i. Click on “Edit Expense”
    - ii. Merchant: Indiana Department of Homeland Security
    - iii. Reasons: Elevator permit renewal for “enter property name”

#### REASONS

Elevator permit renewal for North by Northwest

- iv. Select the Credit Card you used
- v. Enter the amount
  1. It will prelist this amount as the “Total Amount Due” from the receipt - **CHANGE IT** to the “Total Amount Collected” listed on the receipt

					TOTAL AMOUNT DUE:	\$128.40
Payment Date	Method of Payment	Check/CC#	Collected Amount	Convenience Fee(s)	Amount Collected With Fee(s)	
05/11/2022	Credit Card	3231	\$128.40	\$3.58	\$131.98	
TOTAL AMOUNT COLLECTED					\$131.98	

vi. Click “Save” and sign out

Random notes:

Varsity units for Turn

Studios

100

200

300

107

109

110

210

310

A1

B2

C3

D4

The other units that we have listed as “studios” are actually considered 1-beds due to the oversized closets