

Approving Past Due Accounts for Referral in the Management Portal Tip Sheet for Community Executives

Online approval of requests for the past due member accounts pending referral to the community association's attorney, lien service, or collection agency is an optional business process that your management company can offer you through the CiraConnect Board / Management Portal ("Classic"), CiraMobile for iOS devices and now, we are excited to be able to offer, the new and efficient Management Portal.

Board approval of collection files is enabled for all community associations barring the board having granted the management team "delegated authority" (meaning, in short, the ability to automatically refer files once they have exhausted all collection notices and legally required steps). In other words, online review and approval of collection files is the default configuration unless you grant us that authority. Typically, the Board President is the individual configured to be the responsible party, but that can be modified to better meet your board's needs, so discuss it with your Community Association Manager.

As owner accounts become eligible for possible referral, the requirements of which will be unique to each community and your collections configuration, they will begin populating to the Board Approval page in the Management Portal. To assist you with the review process, we have prepared this Tip Sheet, but please do not hesitate to contact your Community Association Manager anytime you have questions or concerns about the process.



Accessing the Management Portal

From the Main Portal Menu

The main website menu listing all available user portals is www.ciranet.com.



Figure 1: Accessing the Management Portal from the Main Menu

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Once there, you will see a menu of available portals. The new Management Portal is available at the bottom of the list.

The Board Approvals Page

If you have spent time in the Resident Portal, you will notice that the look and feel is similar. Users navigate to the modules using the side **Navigation Pane**. We have additional resources to help board and committee members on using that to its full advantage, but for these purposes, the Board Approval page is in the **My Work Queue** under the sub-node **Community Management**:

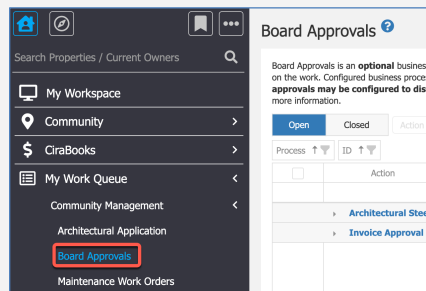


Figure 2: Accessing the Approval Page

Collections Referral is one of three potential online approval options (Architectural Request Approval and Invoice Approval being the others). If you are an approver for more than one option, when you first open the Board Approval page, the approval types will appear in alpha order. To filter to the files waiting for review, use the grid to filter to **COLLECTIONS**. Alternatively, you see the options when you first open the page, the approval types will appear in alpha order in a grid format, with the entries "collapsed" under the **Process** header. There are two options to expand the grid to view to the items that you want to action on:

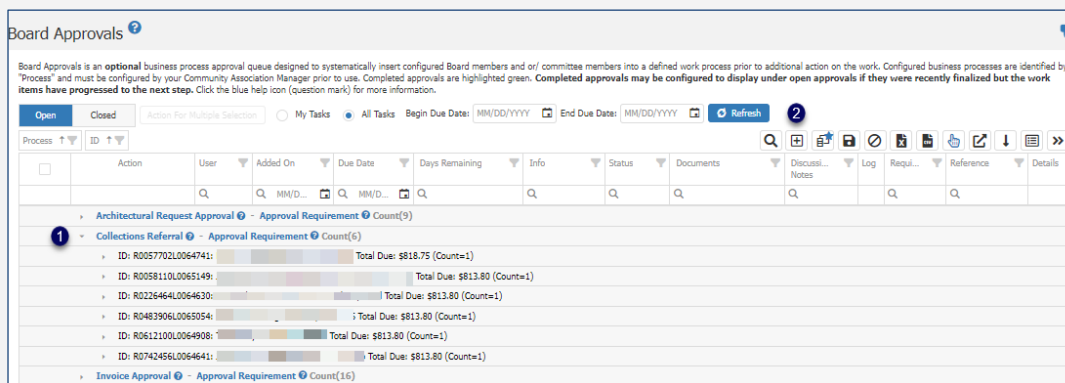


Figure 3: Options to Expand the Grid View

Navigating the Page View

We will take you on a tour of the features of the page before stepping you through the approval process.

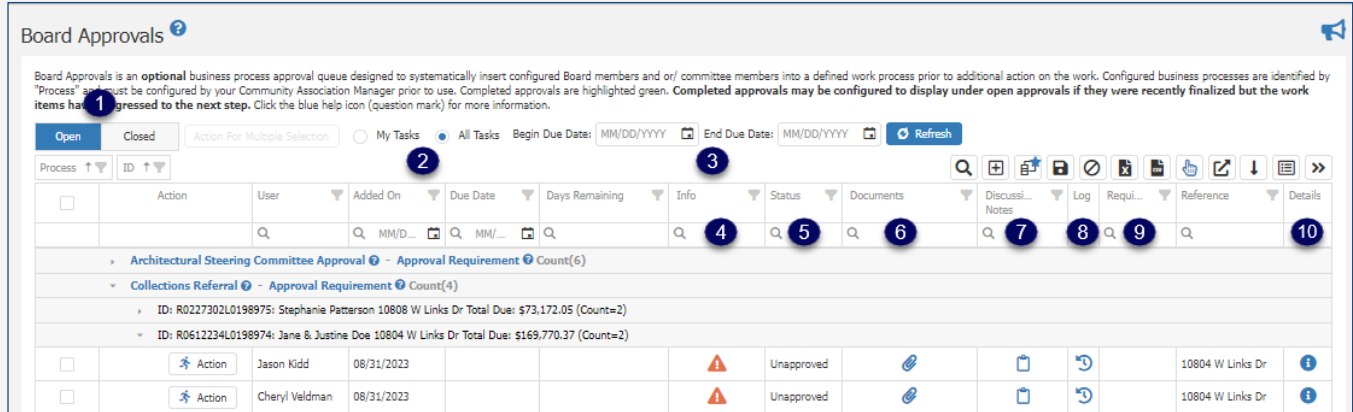


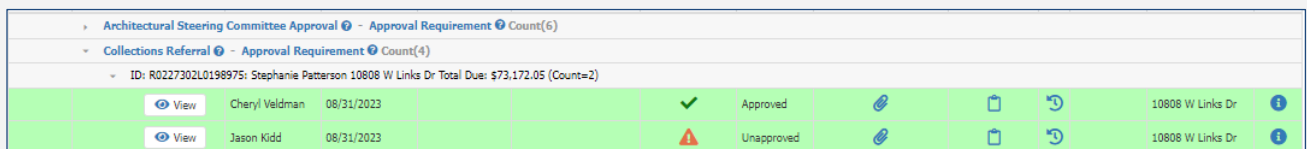
Figure 4: The Board Approvals Page

1. **Open** and **Closed** Tabs. The page is split into two tabs, with the **Open** items being the default view, but users can look back on actioned items by clicking on the **Closed** tab.
2. **Task View**. The page will open by default to the setting of **All Tasks**, which means that you will be able to see, but not action on, all other voters' line items and be able to assess immediately what their status is. This is not as critical for Collections Referral in most cases, since a single approver is the norm, but if you have the other disciplines as part of your access this does help the page load and work more efficiently.
3. **Begin Due Date** and **End Due Date**. These date ranges can be used in either tab to help filter down to only the results you wish to concentrate on.
4. **Info**. These symbols allow a quick visual assessment of all the approvers' voting status. In the illustration above, the caution symbol tells us that no one has voted on the pending files. A green check mark would indicate the voter approved the item, a red X indicates a denial while a red flag indicates the approver has placed the file in review.
5. **Status**. However, we do also state it clearly in the next column.
6. **Documents**. Generally speaking, there are not additional documents related to collections files (you will have the opportunity to view the owner's statement back to the beginning \$0 balance that we will review below), but if there was a document that the manager loaded to support the file, such as an owner's correspondence about their debt, you would see a number in parentheses indicating how many documents are linked. To view them, click on the paperclip.

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- Discussion Notes.** This notepad allows you to communicate with your fellow board members about the request you are working on. Again, since this is typically configured for a single board member, there are fewer occasions where notes are present, but it is available even if you wish to make a note for your own purposes. If there is a note in place the notepad is highlighted green with a check mark. If there are no notes yet, the notepad is clear, as is the case in the illustration above. To add a new note, simply click on the icon to open to a pop-up window enabling you to leave your comment.
- Log.** Most actions taken in CiraNet are logged so this allows you to see the activity for this line item, including when email reminder notifications were sent.
- Required.** Some board members may be designated as Required approvers, meaning that they must opine on a matter no matter what other approvers do. A green check mark in this column indicates that individual's approval is Required. Given that there is generally a single approver assigned for collection files, this is an exception for this discipline.
- Details.** Clicking on the "i" here opens to the **AR Collections Details**, which we will detail below.

Any line items highlighted in green in the Open tab indicate a recently actioned item. By default, these items will remain in place on the Open tab for three days¹ to allow the members to keep track of the files that have been brought before them recently. This does not, however, impede the processing of the referral in the meantime. Note that the **Action** button seen on your open items is replaced with **View** in this status, since the item has been moved on or rejected back and no further action can be taken on it.



Architectural Steering Committee Approval - Approval Requirement Count(6)	
Collections Referral - Approval Requirement Count(4)	
ID: R0227302L0198975: Stephanie Patterson 10808 W Links Dr Total Due: \$73,172.05 (Count=2)	
View	Cheryl Veldman 08/31/2023 ✓ Approved 10808 W Links Dr
View	Jason Kidd 08/31/2023 ⚠ Unapproved 10808 W Links Dr

Figure 5: Approved Collections File

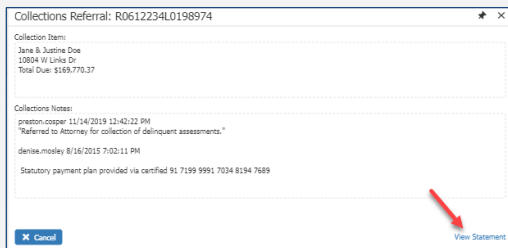


Figure 6: The AR Collections Detail Window

Viewing the AR Collections Details

The **AR Collections Details** window, or "Collections Referral" shows any collections-specific notes either the management team members have made, or the system has automatically noted (an example would be if the file had been on the cusp of pending referral approval before but then dropped below the threshold due to a payment).

¹ This is configurable by community association.

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This can help you assess the owner's situation in some cases. But also, you have the opportunity to click on **View Statement** to open to an owner statement dating back to the last \$0 beginning balance to help assess the owner's payment history since they began to fall behind.

Acting on a File

When you are ready to decide on the file, use your mouse pointer to click on **Action** to open to a smaller window.

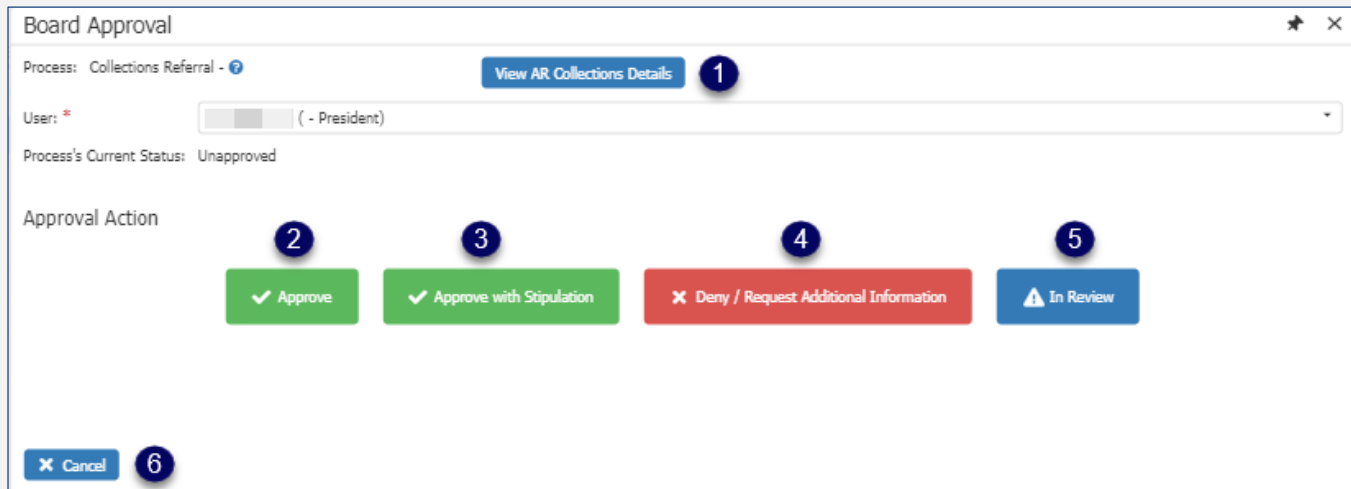


Figure 7: The Board Approval Window

1. **View AR Collections Details.** Clicking here opens to the smaller window detailed above.
2. **Approval Action: Approve.** If you wish the file to be referred, simply click this option and the file will be released to allow it to be referred to the appropriate agency/law firm.
3. **Approval Action: Approve with Stipulation.** If you select this option, you will in turn be presented by a small notes window to be able to document what the stipulation is so the Collections Shared Services Group can react accordingly.
4. **Approval Action: Deny/Request Additional Information.** Choosing to Deny the file means it will not be referred at this time. You will again be asked to leave a note as to why the file is being returned.
5. **Approval Action: In Review.** This action in essence does nothing with the file but leaves it in your approval queue.
6. **Cancel.** Click here to close the window without taking any action.

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NEW MULTIPLE SELECTION FEATURE! The new Management Portal can support actioning on multiple line items at once using the **Action For Multiple Selection** tool. The option is only available for one Process at a time, so use the filter to the process you wish to action on and using the check boxes at the far left-hand column, either click the box at the very top (to select all items) or check just the ones you wish to vote on and note that the button entitled Action For Multiple Selection will then be enabled. Click on it to open to the vote options and select the appropriate action.

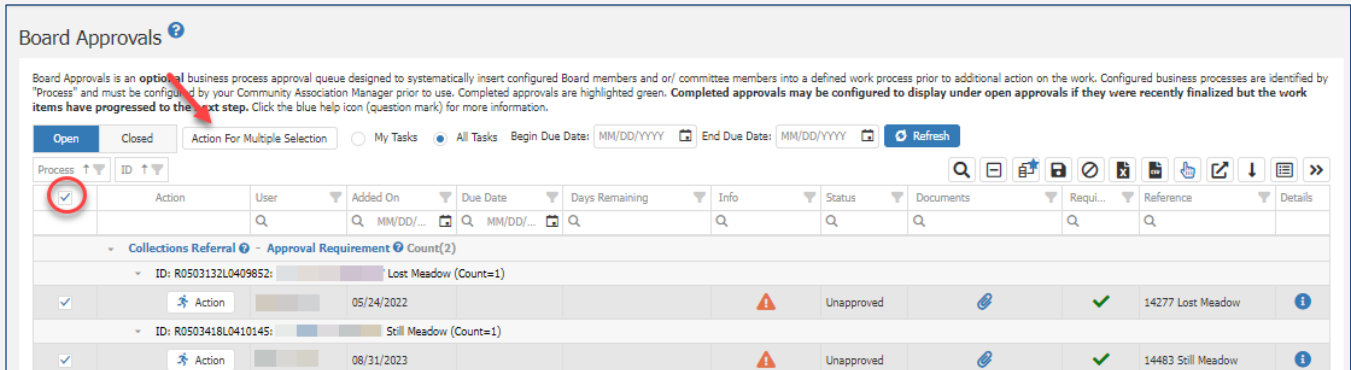


Figure 8: Using the Action For Multiple Selection Tool

Knowing When Files Are Ready for Approval

Collection files are assessed based on the debit statement cycle and any files that are eligible at that time will be populated to your approval queue. Your manager can enable an automatic email reminder if you so choose that will send an automated message to the email on file for you periodically. If they enable it for you, it can be set for any number of days that best suits your needs. Therefore, work with your management team on what would be the most convenient for you. Automated email reminders will come from [CommunityID]@ciramail.com, so if you believe you are not receiving emails and expect to, please check your Spam folder. Currently, the link to CiraNet that is included in the email is delivering you to the Classic Portal.

If you elect not to receive email reminders, we recommend checking your Board Approval page routinely.

A Bit About Browsers

Working in the Cloud means you can access CiraNet no matter where you are or what computer you are using, but all browsers differ slightly and your use experience will as well, depending upon which one you select. CiraNet is supported on Chrome, Microsoft Edge, Firefox, and Safari, but you may use any browser that you are comfortable with and prefer. However, to enjoy the best user experience, make sure you are using an up-to-date version of your selected browser. Be mindful that if you are in a public setting, such as a coffee shop or in the airport, you are sharing your bandwidth with your fellow

patrons, and it will impact the browser's efficiency. Other applications running at the same time on your browser, such as any streaming media application, will also slow down the application.

CiraMobile



CiraMobile is available for free download in the Apple App Store. The application is accessible on a tablet as well as an iPhone. Simply search for CiraMobile (spelled as a single word) or CiraConnect. (While there is an Android version of the mobile application, it does not support executive approvals currently.)

Approving pending applications through CiraMobile is based on the same basic approval/response principles as outlined for CiraNet above and the data is returned in the same manner, so there is no advantage or disadvantage to using one over the other, it is completely your preference!

Technical Support Tips

While we hope you do not, if you ever experience a technical difficulty with either CiraNet Portal, please try these preliminary self-help options to see if they will clear the issue:

1. Hard refresh (Ctrl+F5) the page to cause it to reload. Often that is all it takes to remove an impediment to the data loading correctly.
2. If it does not, however, try clearing your browser cache and cookies²
 - Instructions for Chrome: <https://support.google.com/accounts/answer/32050>
 - Instructions for Firefox: <https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>
 - Instructions for Edge: <https://support.microsoft.com/en-us/help/10607/microsoft-edge-view-delete-browser-history>
 - Instructions for Safari: <https://support.apple.com/en-us/HT201265>

After you have done this, completely close the browser and start over with a new session. Log directly into CiraNet without using a bookmark, meaning simply type in "ciranet.com" into your browser and proceed to login from there. Sometimes if people use bookmarks or "recent website" link to access CiraNet, the link can include an old session ID which causes the browsing experience to be dramatically slower or takes you to an incorrect location within the platform.

NOTE: If you are worried about losing password information, please use the advanced options available in most browsers and uncheck the option to clear passwords.

² The purpose here is to make sure you are loading the most up-to-date version of the platform. Old, cached data may be preventing any updates and recent bug fixes from loading for you.

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If those steps fail, please let your Community Association Manager know right away. The following information will help us troubleshoot the issue and get you back in business as soon as possible:

1. Please walk us through the steps you took to navigate to the point of the error in as much detail as possible.
2. What is the error message you received, or describe the unexpected outcome you received?
3. Please provide a screenshot of the error if possible. **It is most helpful to snag the entire screen, including the URL search bar.** This allows us to see the error in context.
4. Please identify the environment you were working in. What we mean by that is please tell us if you were on a mobile device, PC, or a Mac, and the browser you were using. If you can identify the version of browser you were on and the zoom or magnification settings you are using, that is also great information.