Workflow - Visual Diagram

Make Ready Process on Smartboard

High Level Overview of the Process

01

User completes the Move out inspection

- After the user completes the Move out inspection, they determine whether the unit is a "Turnover" or a "Renovation Unit".

- This process will review from that point until the unit is marked as ready.

02

Unit appeared as Received

The unit will appear on with the "Turnover" or a "Renovation Unit" tab with the "Received" status.

TURNOVER | **RENOVATED UNITS**

STATUS

Received

03

Change Unit status

Maintenance Super can now mark the applicable services that need to be completed in the unit on the Smartboard and change the Unit status to "Work in Progress".
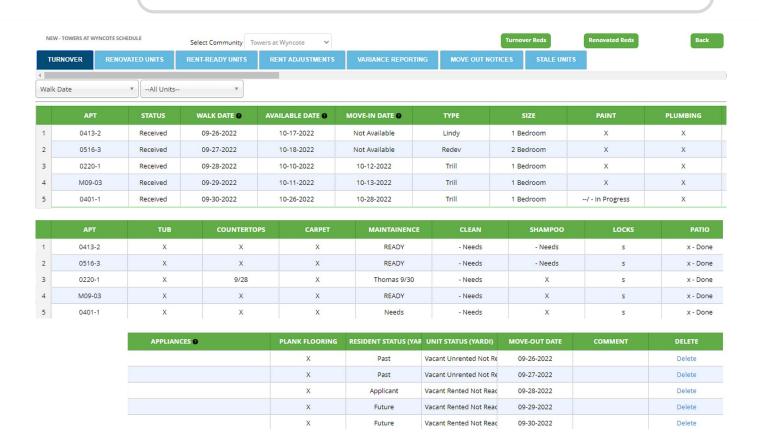
	APT	STATUS	WALK DATE ❓	AVAILABLE DATE ❓	MOVE-IN DATE ❓
1	0813-1	Work In Progres	08-24-2022	09-19-2022	09-21-2022

04

Updating the Status

As they work on getting the unit ready, they should be updating the status of each item they need to complete on the Smartboard.

NEW - TOWERS AT WYNCOTE SCHEDULE   Select Community [Towers at Wyncote ▾]   [Turnover Reds]   [Renovated Reds]   [Back]

TURNOVER	RENOVATED UNITS	RENT-READY UNITS	RENT ADJUSTMENTS	VARIANCE REPORTING	MOVE OUT NOTICES	STALE UNITS

[Walk Date ▾] [--All Units-- ▾]

	APT	STATUS	WALK DATE ❓	AVAILABLE DATE ❓	MOVE-IN DATE ❓	TYPE	SIZE	PAINT	PLUMBING
1	0413-2	Received	09-26-2022	10-17-2022	Not Available	Lindy	1 Bedroom	X	X
2	0516-3	Received	09-27-2022	10-18-2022	Not Available	Redev	2 Bedroom	X	X
3	0220-1	Received	09-28-2022	10-10-2022	10-12-2022	Trill	1 Bedroom	X	X
4	M09-03	Received	09-29-2022	10-11-2022	10-13-2022	Trill	1 Bedroom	X	X
5	0401-1	Received	09-30-2022	10-26-2022	10-28-2022	Trill	1 Bedroom	--/ - In Progress	X

	APT	TUB	COUNTERTOPS	CARPET	MAINTAINENCE	CLEAN	SHAMPOO	LOCKS	PATIO
1	0413-2	X	X	X	READY	- Needs	- Needs	s	x - Done
2	0516-3	X	X	X	READY	- Needs	- Needs	s	x - Done
3	0220-1	X	9/28	X	Thomas 9/30	- Needs	X	s	x - Done
4	M09-03	X	X	X	READY	- Needs	X	s	x - Done
5	0401-1	X	X	X	Needs	- Needs	X	s	x - Done

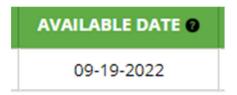|	APPLIANCES ❓	PLANK FLOORING	RESIDENT STATUS (YAR	UNIT STATUS (YARDI)	MOVE-OUT DATE	COMMENT	DELETE
		X	Past	Vacant Unrented Not Re	09-26-2022		Delete
		X	Past	Vacant Unrented Not Re	09-27-2022		Delete
		X	Applicant	Vacant Rented Not Read	09-28-2022		Delete
		X	Future	Vacant Rented Not Read	09-29-2022		Delete
		X	Future	Vacant Rented Not Read	09-30-2022		Delete

05 information for leasing team

The user should also make sure the "Available Date" is updated to reflect when the unit is estimated to be ready. This updates the unit setup in Yardi and is important information for the leasing team.

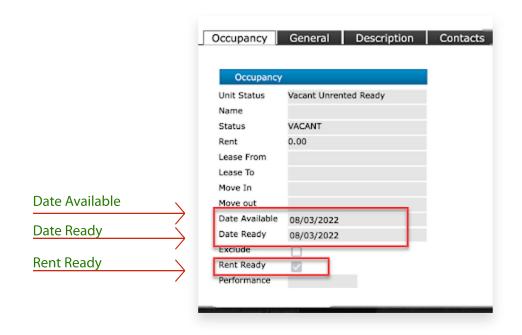**AVAILABLE DATE** ❓

09-19-2022

06 Updating in Yardi

- The 'Date Available' field is updated with the date the unit was marked as Rent Ready in Smartboard.

- The 'Date Ready' field is updated with the date the unit was marked as Rent Ready in

| Occupancy | General | Description | Contacts |

Occupancy

Unit Status	Vacant Unrented Ready
Name	
Status	VACANT
Rent	0.00
Lease From	
Lease To	
Move In	
Move out	
Date Available	08/03/2022
Date Ready	08/03/2022
Exclude	
Rent Ready	☑
Performance	

Date Available →
Date Ready →
Rent Ready →

07

Rent Ready Alert Email

This also generates an email to the "Rent Ready Alert Email" found on the building setup in Toolbox letting them know they must complete the Make Ready Inspection in the mobile app.

Overview of Smartboard Columns

APT	STATUS	WALK DATE	AVAILABLE DATE	MOVE-IN DATE	TYPE	SIZE
0813-1	Received	08-24-2022	09-19-2022	09-21-2022	Lindy	3 Bed den
0812-3	Received	08-25-2022	09-15-2022		Lindy	2Bed/2Bath

APT

- Yardi Unit code that was selected when the user created the move out report.

- User cannot edit this field.

STATUS

- User must edit this field

- Received – default status once the unit's move out inspection is completed.

- Work in Progress- user should change once they determined what action items need to be completed and the work has started.

- Move to Renovated or Move to Turnover- If user selected the wrong type when completed the move out inspection they can fix it using this option.

Move to Rent Ready- User must select this status when the work on the unit is completed and its ready for the make ready inspection. When completed the "Ready" flag and "Date Available" and "Date Ready" date fields on the Unit Setup in Yardi.

WALK DATE

- Date the move out inspection was completed on the app.

- User cannot edit this field.

AVAILABLE DATE

- Each property has a default setup for this date.

  - If a unit has a move in scheduled the available date will be 2 days before the scheduled move in. If there are no move ins scheduled it will default to X days from the Walk Date. (# of days can vary by property)

- User can edit this field to make sure the date they believe the unit will be available.

- User is encouraged to update to ensure its as accurate as possible because leasing team will rely on this information.

- This date should flow into Yardi. Whatever date is showing in this field should be updated on the Unit setup in Yardi in both the "Date Available" and "Date Ready" date fields. This should be done overnight.

MOVE IN DATE

- If the Unit status is Vacant Rented Not Ready, then the move in date scheduled for the applicant should pull into this column.

- User cannot edit this field.

TYPE

- Each property has different types setup. They are usually based on the current renovation level of the unit.

- User can edit and must select this field.

SIZE

- It varies by property but when the property is setup in Toolbox, we match the type based off the Yardi unit type.

- User can edit this field if for some reason it is not accurate.

PAINT	PLUMBING	TUB	COUNTERTOPS	CARPET	MAINTENANCE	CLEAN	SHAMPOO	LOCKS	PATIO	BASEBOARD
X	X	X	X	X	Quan 6/8	- Needs	X	s	x - Done	Needs
X	X	X	X	6/9	Quan	9/9	- Needs	s	x - Done	x - Done

WORK ITEMS COLUMNS

- These vary by property but commonly include, painting, plumbing, flooring, cleaning, etc.

- Users update each column to indicate what items need to be completed by unit and update the status of each item on the Smart board.

RESIDENT STATUS (YARDI)	UNIT STATUS (YARDI)	MOVE-OUT DATE	COMMENT	DELETE
Applicant	Vacant Rented Not Ready	08-24-2022	Large trash out Building cancer	Delete
-	-	08-25-2022	Large trash out Stain right bedr	Delete
Applicant	Vacant Rented Not Ready	08-26-2022		Delete
Applicant	Vacant Rented Not Ready	08-30-2022		Delete

RESIDENT STATUS

- Status comes from Unit Setup in Yardi

- User cannot edit this field.

UNIT STATUS

- It will either be "Vacant Rented Not Ready" or "Vacant Unrented Not Ready"

- User cannot edit this field.

MOVE-OUT DATE

- Pulls the date the previous resident moved out from the Unit History in Yardi.

- User cannot edit this field.

COMMENT

- Users can edit this field to add notes about the unit that could be helpful for the team.

DELETE

- If a user completes a move out inspection for the wrong unit #, they can delete the unit from the Smartboard.