HOMEOWNERS PORTAL USER GUIDE

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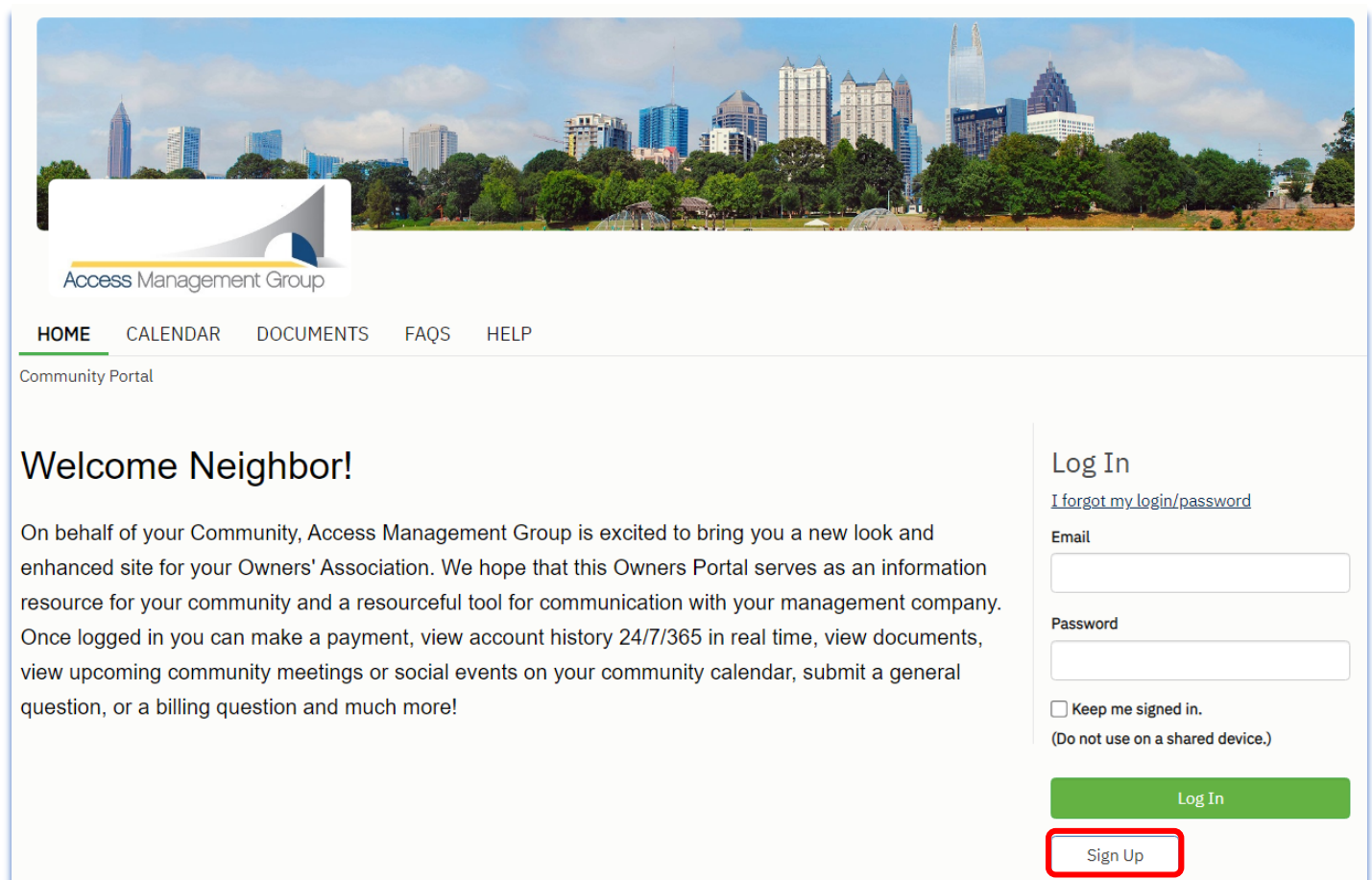
PORTAL REGISTRATION

➢ To register a login for your account in your Owners Portal please visit **accessmgt.com** and click **'Homeowner Login'** at top of your screen. If using a mobile device click the three bars (☰) at top right of page. Be sure to bookmark this page for easier access in the future!
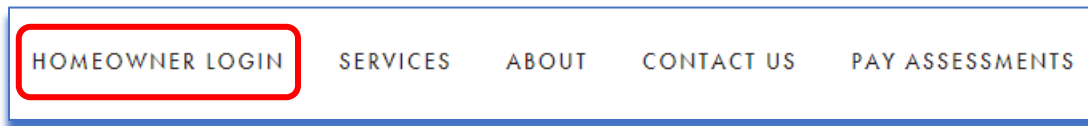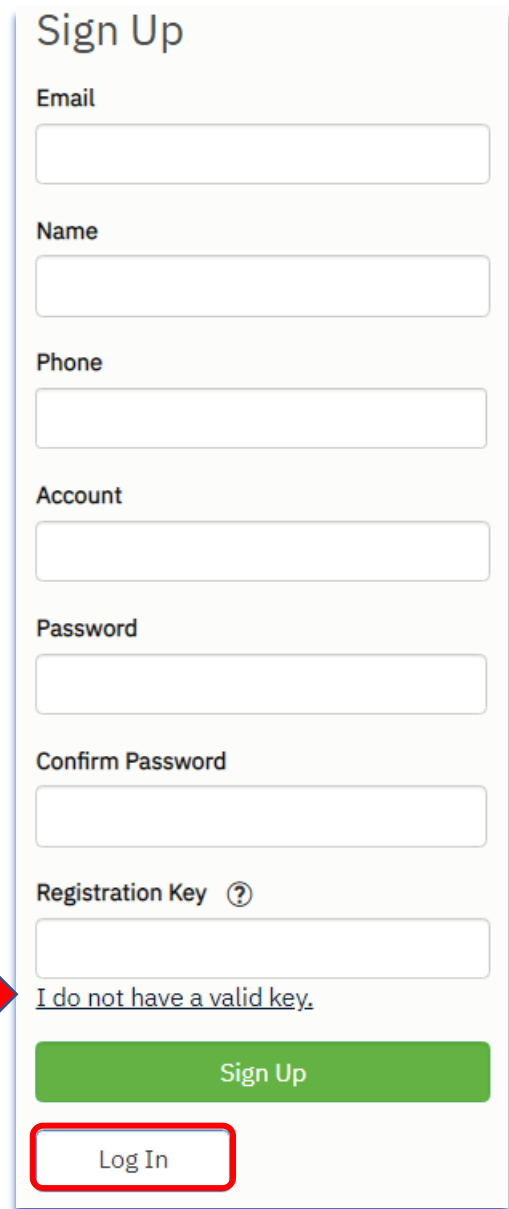

➢ Once on the portal login screen click **'Sign Up'**.

Sign Up

Email

Name

Phone

Account

Password

Confirm Password

Registration Key ⓘ

I do not have a valid key.

Sign Up

Log In

➢ To sign up and register a login profile with your account you will need to know your **Account Number** and **Registration Key** associated with your property. If you are a new homeowner or your community recently joined the Access Management team, this information would have been emailed or mailed to you via a welcome letter.
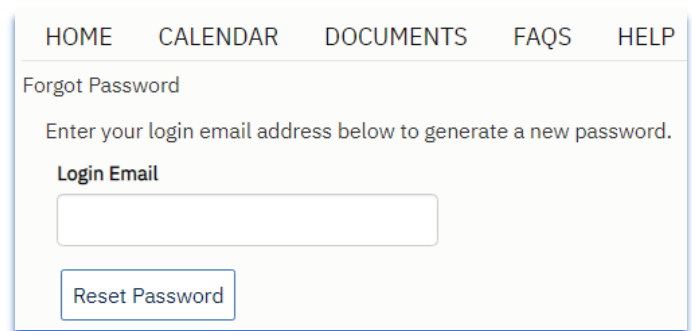
➢ If you have your **Account Number** and **Registration Key** handy you may continue to complete your portal registration for access to your account information, make payments, view documents and much more!

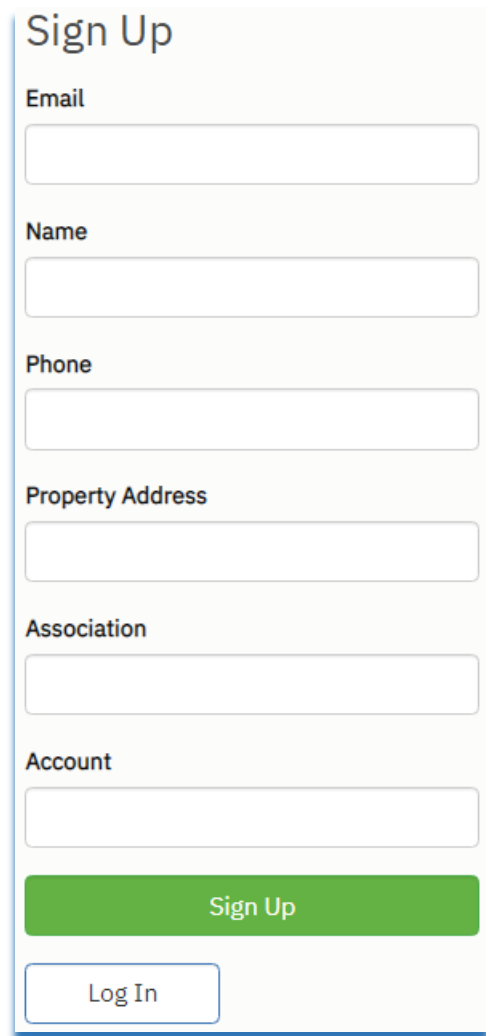➢ If you do not have your account number and/or registration key, please click **'I do not have a valid key'**.

➢ Prior to submitting a portal registration request, please utilize the **'I forgot my login/password'** option to see if a login already exists. Our system will search for the email address you entered and if a login already exists you will receive an email with a new temporary password, or we will send you an email letting you know a login does not exist and to request a login.

HOME   CALENDAR   DOCUMENTS   FAQS   HELP

Forgot Password

Enter your login email address below to generate a new password.

Login Email

Reset Password

➢ Once you have confirmed a login does not already exist, you may continue to submit your registration request by providing your email address, name, phone number, property address, association name, and account number (if known).

➢ Upon submittal of your request an Access Management Team member will review and seek to associate it with your account. Within 1-2 business days you will receive an email with information related to your request. Please follow the instructions contained in the email to complete your registration.

➢ Should you require further assistance you can email info@accessmgt.com or call us at 770-777-6890.

Sign Up

Email

Name

Phone

Property Address

Association

Account

Sign Up

Log In

➢ When you login you will begin on your '**Dashboard**', which is your "Homepage" for the portal. From the Dashboard you can quickly see your current account balance as of that day, see if any future assessments are forthcoming, initiate a payment, access recent activity, and '**Submit a New Request**' that includes a General Question, Billing Question, Architectural Request, and more!
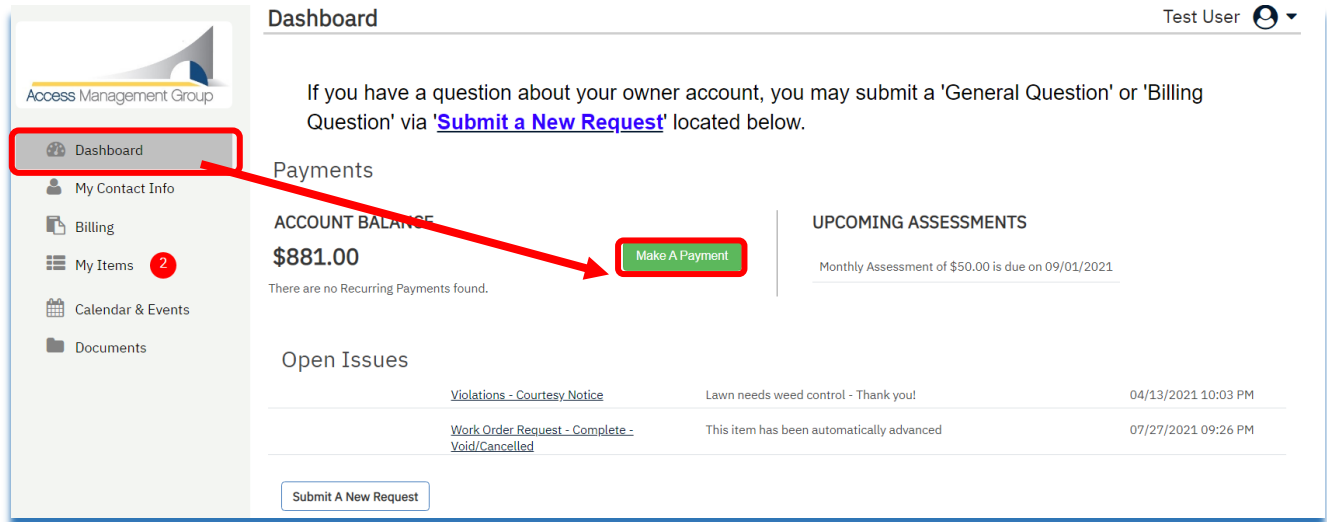
MAKE A PAYMENT

➢ On your owner's portal you can easily make a payment utilizing a variety of payment options of your choosing. You can initiate a payment from two locations, your **'Dashboard'** or **'Billing'** pages. On your Dashboard click the green '**Make a Payment'** in the center of your screen.

➢ In addition to other payment methods such as a traditional check or utilization of your financial institutions online bill-pay services, you have three (3) payment choices available for use on your owner's portal:

➥ **Auto Draft**
➥ **One-Time eCheck**
➥ **Credit Card***
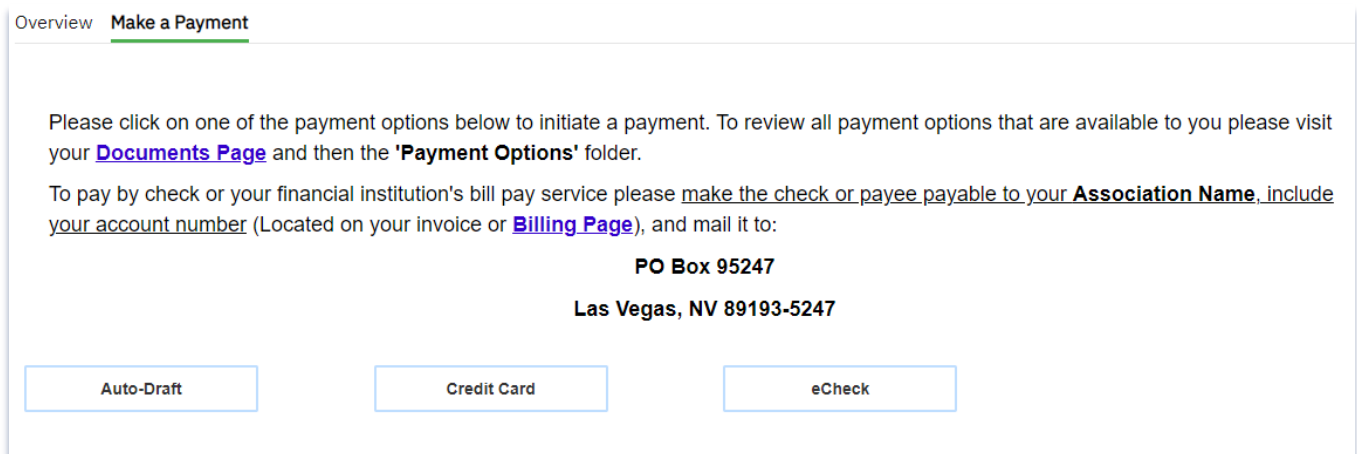
AUTO DRAFT

➢ Auto Draft (Also commonly referred to as "ACH") is a convenient way to pay your <u>regular</u> association assessment free of charge and is a true "set it and forget it" payment option that you can cancel at any time. **NOTE** - <u>Auto Draft is only available for your regular association fee and is not available for any other charge to your account</u>. E.g., Special Assessment(s), Pool Card, Clubhouse rental, etc. Once set up you just need to ensure there are adequate funds available to prevent a possible payment return. If the assessment amount changes from one year to the next your payment amount will automatically update! For most of our Associations, Auto Draft will occur five (5) days after your regular assessment due date. E.g., If your assessment is due on the 1st day of the month, Auto Draft will occur on the 5th day of the month. There are a few of our clients where Auto Draft needs to run on the assessment due date. If this applies for your community, it will be noted on the Auto Draft page.

➢ To enroll for Auto Draft your account must have a $0.00 balance at the time of enrollment. If your account is at $0.00 then click '**Enroll/Update All Properties**' or '**Enroll**' to continue. If your account has a balance, you can conveniently issue a **'One-Time Payment'** from this page.

Auto-Draft

Test User 👤 ▼

Make a Payment > All Auto-Drafts

We are pleased to offer Automatic Draft for your Association's assessments, free of charge! Under this Auto Draft agreement, your regularly scheduled Assessments will be automatically drafted **5 days after the assessment billing date** (E.g. Assessment is billed on the 1st of the month, Auto Draft will occur on the 5th of the month). With Auto Draft, the draft amount will automatically change according to your Association's yearly budget, so you won't have to make any changes when your Assessment balance increases or decreases.

In order to enroll in Auto Draft, your account balance must be paid in full. If you have a balance due, you can submit a one-time eCheck payment, and then return to this page to enroll in Auto Draft. Make sure to edit the start date for your next assessment due date.

Please keep in mind that this authorization is for your regularly scheduled Assessments only. If you have a question about your draft or the best payment option for your unique situation, you may submit a 'Billing Question' via 'Submit a Request' located on your 'Dashboard' or 'My Items' pages. We are always glad to assist!

Enroll/Update All Properties

Account	Address	Bank Account	Routing	Start Date	Balance	
▲ **Presidential Valley Property Owners Association**						
888133887	1913 Pennsylvania Ave				$881.00	One-Time Payment *

➢ On the enrollment page you will be asked to indicate what kind of account you wish to pay from (Checking or Savings) as well as provide your financial institutions routing number, checking/savings account number, and a start date you wish for Auto Draft to begin. <u>Please be sure to double check that all information provided has been entered correctly</u> and your start date is on or before your assessment billing date you wish for Auto Draft to begin.

Account Type

Checking ▼

Checking Account Number

Confirm Checking Account Number

Start Date

🗓

Bank Routing Number

➢ Confirm the property you wish to include in the Auto Draft is listed then enter in a esignature to authorize the payments and click '**Enroll in Auto Draft**' and you are now enrolled!

These properties will be included in the Auto-Draft:

Account	Property
◢ Association: ██████████████████	
████████	████████████████████

"I hereby authorize Access Management Group, or its representative, as managing agent for your Association, to debit the identified account for the amount of my assessment payment for that billing month. Likewise, I authorize my financial institution to accept this debit and charge it to my account. If the transaction is established as recurring in nature, I authorize future occurrences until I rescind this authorization. I agree that the ACH transaction I authorize complies with all applicable laws."

eSignature: TEST USER

Enroll in Auto-Draft

➢ To **Edit** or **Cancel** Auto Draft, revisit the Auto Draft enrollment page and select '**Edit**' or '**Disable'.**

Enroll/Update All Properties

Account	Address	Bank Account	Routing	Start Date	Balance
████████████████					
██				Edit	Disable

ONE-TIME ECHECK

➢ One-Time eChecks are offered through our bank, Alliance Association Bank ("AAB"). On the one-time Echeck page you will select 'Make Payment' which will redirect you to AAB's payment site.

To make a one-time **eCheck** payment using your checking or savings account, please click on the **'Make Payment'** button below.

Account	Property	Balance	
88870064	1100 Northmeadow Pkwy, Ste 114 Roswell, GA 30076 at Presidential Valley Property Owners Association	$2,265.00	Make Payment

➢ <u>Please be cognizant of their processing times for your payment to post to your account (Typically 3-5 business days) and make sure to double check that all your banking information has been entered correctly</u>! Please note that assessments are billed on the day they are due. To see any upcoming assessment billing dates, you may visit your **'Dashboard'** to review. You can make a payment of any amount, regardless of your balance due.

Please contact Alliance Association Bank at 844-739-2331 with any questions or issues with use of their site as for security reasons we do not have access to any of your information entered and as such are unable to provide support.

CREDIT CARD PAYMENT

➢ Credit/Debit Card payments are offered through our bank, Alliance Association Bank, who has contracted with a third-party vendor to jointly provide you with a safe and secure credit card payment system for your convenience. <u>A processing fee will apply for each transaction made through their credit card payment system with a $1,000 limit per transaction</u>.

➢ To initiate a payment through their system you will need to notate the **Management Co ID** and **Association Code**. This information will be provided on the Credit Card Payment screen. To get started select **'Make a Payment'**, which will redirect you to Alliance Association Banks payment website. Please contact Alliance Association Bank at 844-739-2331 with any

questions or issues with use of their site as for security reasons we do not have access to any of your information entered and as such are unable to provide support.

Credit Card Payment

Make a Payment > Alliance Association Bank Payment

Alliance Association Bank

For credit/ debit card payments, click on the "Make Payment" link below you will be directed to a third party website. There you can make payments that will be applied directly to your Association's account. Alliance Association Bank has contracted with a third party vendor to jointly provide you with a safe and secure credit card payment system for your convenience. **A fee will be charged for each assessment payment made using this credit card payment system.** Please contact Alliance Association Bank at 844-739-2331 with any questions or issues with use of the following site.

When making a payment, you will be asked to enter in the following information:

Management Co ID: 0502
Association Code: ▮

Account	Property	Balance	
▮▮▮▮	▮▮▮▮▮▮▮	$0.00	Make Payment

SUBMITTING A REQUEST

➢ If you have a question about your account, your Association, or need to request something, you can easily do so from your Owner's Portal. You can initiate a question or request from either your **'Dashboard'** or **'My Items'** page.
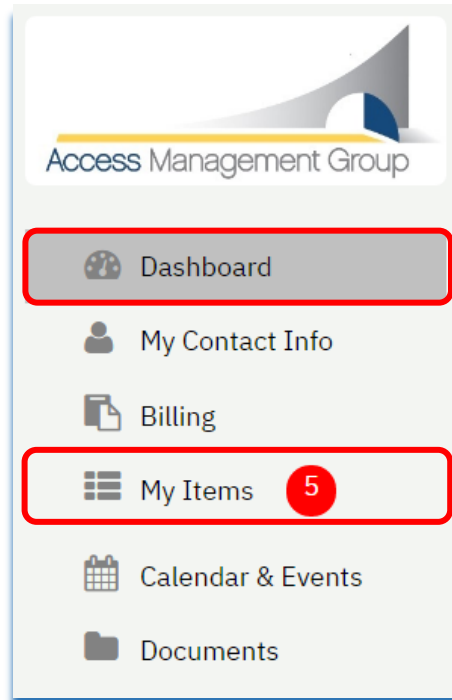
➢ On your **'Dashboard'** select **'Submit a New Request'** located towards the bottom of the page.
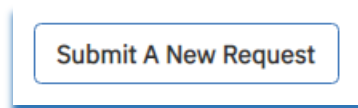
➢ On your **'My Items'** page select **'Submit a Request'** located at the top of the page.

Welcome to your My Items page! This page allows you to follow activity on requests submitted through the *Submit a Request* page and any open tickets, which we refer to as "Action Items". Action Items displayed here include all open activity for your property or properties or any closed Action Items over the last 30 days.

Click on a subject to see further details about that Action Item. If a letter was sent as part of that Action Item click anywhere you see a Paperclip icon to view the letter(s). If an email was sent click where you see Email to view the email sent at that date & time.

You can submit a new request by clicking HERE or use the 'Submit a Request' tab located above.

➤ Once you select Submit a Request from either page you will be asked to select the type of request you wish to submit, a **'General Request'** or **'ARC Request'**.

GENERAL REQUEST

➤ When you select **'General Request'** be sure to verify the address you wish to submit your inquiry for is correct. If you only own one property it will automatically populate for you, but if you own more than one property you can select which property the inquiry is for via the **Property** drop-down menu. From there select a topic that best specifies the type of request you are submitting which will ensure it is sent to the appropriate Access Management Team Member. A brief description of what each drop down choice offers is shown on this page. You will also be asked to provide a **Subject** and a **Detailed Description** for your inquiry.

➤ When submitting any request please be sure to be as specific as you can and if needed or desired you can upload documents or pictures to help explain your inquiry. While it is our goal to respond to your inquiry as quickly as possible, some inquires may necessitate involvement of your Associations Board of Directors before we are able to respond or if your original request is lacking detail, it may be returned to you seeking more information.

ARCHITECTURAL ("ARC") REQUEST

➢ Doing exterior projects to your home is an exciting time in homeownership, but as a homeowner in a Covenant enforced community, most governing documents require you to submit a formal request outlining the proposed project to be reviewed by the Association who shall provide written approval before you are to proceed. With your Owner's Portal, any documents you may need to review or fill out and return are all right at your fingertips! Once you have selected **'Submit a Request'** from your **'Dashboard'** or **'My Items'** page select **'ARC Request'** to get started!

➢ On the **'ARC Request'** page if your Association requires a **Request Form** to be filled out and returned, or if your community has **Design Guidelines** to reference, they will be located just above the property address. Do keep in mind the name of these documents may vary from one Association to the next.
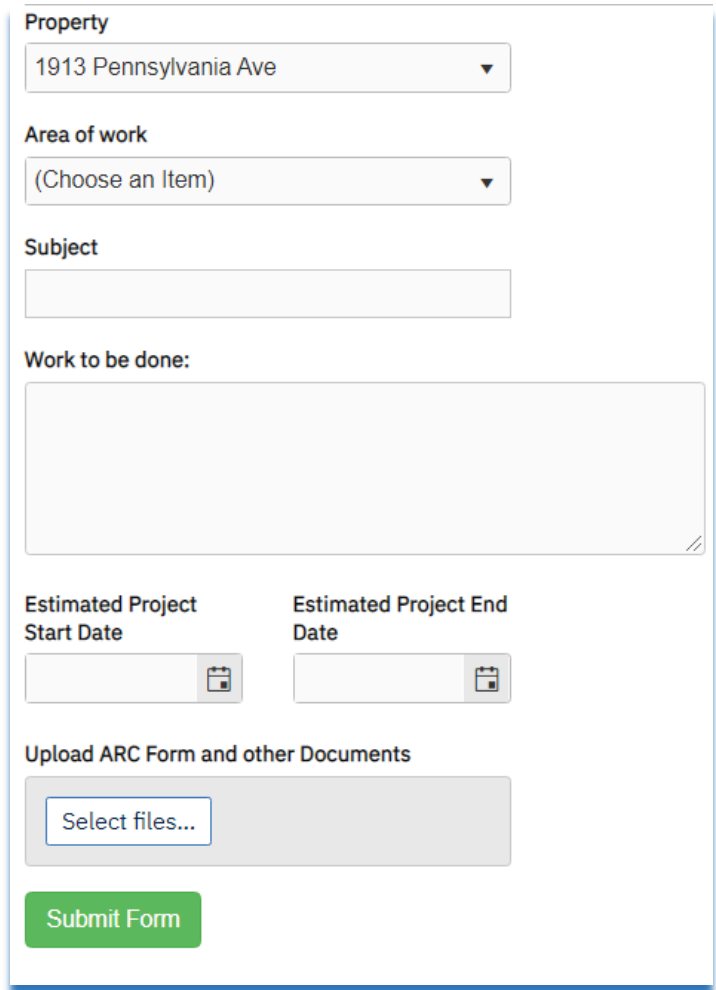
➢ **Be specific!** When submitting any modification request be sure to include a detailed description of the project as well as other useful documents, such as drawings, pictures, list of materials to be used, paint colors, etc. so the committee can make an informed decision on your request. We often receive requests that lack sufficient information so they must be returned seeking those details. This can cause delays in the processing of your request, so please be as detailed as you can!

➢ Once you have compiled all necessary documents needed, ensure the correct **Property** is selected then chose the **Area of Work** that best fits your project, a brief **Subject** followed by a detailed summary of **Work to be Done**.

➢ Select your **Estimated Project Start and Estimated Project End Date**. As another reminder you must first receive written approval from the Association before commencing any work and these start & end dates are approximations. Please review and be mindful of response timelines afforded to your Association located in your Associations **Governing Documents**.

➢ Upload any modification request form or other documents required by your Association or are relevant to your project then click **Submit Form** to begin review of your application!

➢ You will be notified via email to let you know once a decision has been made or if more information may be needed for your project application. Your application is also stored on your **'My Items'** page where you can review previous documents or email communications related to your application.

MY CONTACT INFO

> ➤ The **'My Contact Info'** page is where you can add, edit, or remove contact information, and indicate which email address or phone number shall be primary for the account.

> ➤ This is also where you can update your **Portal Login** email address and/or password.

> ➤ To add a new email address, phone number or to update your mailing address select **'New Contact'**.

> ➤ To edit or delete an existing email address or phone number select **'Edit'** or **'Delete'**.

> ➤ The primary phone, email or address will be shown with **(Primary)** next to it.

Label	Contact		
Test User Cell	(555) 555-5555 (Primary)	Edit	Delete
Test User	test@fakeemail.com (Primary)	Edit	Delete

New Contact

➢ When updating your **Mailing Address** be sure to check **Primary** and **Is Mailing Address**

➢ **General & Billing Communication Preferences** as well as **Directory Preferences** (If enabled for your Association) can also be updated on this page. By selecting **Email** for General or Billing Communication Preferences you agree to have those communications sent to you via electronic means only if your Associations Governing Documents allow for it and when available. Once you have updated your preferences be sure to click **Update** to save your changes.

UPDATING PORTAL LOGIN INFORMATION

➢ To update your Portal Login Information first navigate to your **'My Contact Info'** page followed by selecting the **'My Login'** tab located near the top of the page.

➢ Enter the information that needs to be updated then click **Update** to save your new login credentials!

➢ You may also have more than one login associated with an account. To register another login, you will need your **Account Number** and **Registration Key**. See **Portal Registration** for more information.

BILLING

- ➢ Your Owners Portal provides access to your **Billing** and **Payment** history 24/7/365! To see your detailed account information, select **'Billing'.**
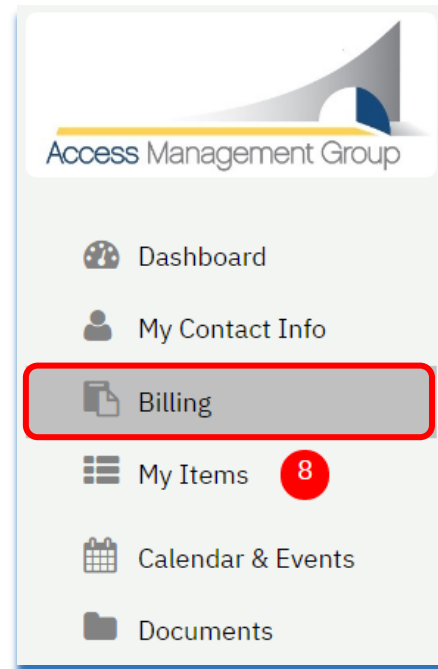
- ➢ On your **Billing** page you can see a summary of any **Balance** you may have on your account. If you own more than one property that has been linked together, they will show separately. You may also **'Make a Payment'** like how you can do on your **'Dashboard'**.

➢ Recent **Billing** and **Payment** information can be found towards the bottom of the page. To see more specific history (E.g. Last 30, 60, YTD, or Full History) select **'View all History'** located at bottom left of page. To download or print your **Transaction History** or a **Statement** select **'Download Report'**. If you own more than one property you can view any of the Account Histories by selecting the property you wish to view via the address drop down menu.

Account History

⬇ Download Report

888133887 - 1913 Pennsylvania... ▼

Tran Date	For	Amount
09/01/2021	Monthly Assessment	$50.00
08/24/2021	eCheck ...54321	($881.00)
08/11/2021	Late Charges	$5.00
08/01/2021	Monthly Assessment	$50.00
07/11/2021	Late Charges	$5.00
07/01/2021	Monthly Assessment	$50.00
06/11/2021	Late Charges	$5.00
06/01/2021	Monthly Assessment	$50.00
06/01/2021	Special Late Fee	$40.00
05/16/2021	Late Fee - test	$5.00

View All History

MY ITEMS

➢ Everything we do in our system is task oriented, which we call an **Action Item**. All Action Items are documented and archived on your account. On your **Owners Portal** via your **'My Items'** page you can review any action items that is Open as well as view any that have been Closed within the last 30 days.

➢ You may also **'Submit a Request'** which is located at the top of the page.

➢ To view details of an **Action Item,** click on the **Subject** you wish to view.

➢ If you need to search for anything, each column has a search field located at the top with filter options (▼) next to it.

➢ To view details of the Action Item **Subject** you selected, such as email(s), documents, pictures, etc. click anywhere you see **Email** to view the email that was sent or click anywhere you see a **Paperclip** (🖉) to view any attachments sent. When reviewing attachments be sure to use the **Next**, **Previous**, or **Drop-Down Menu** to scroll through all attachments.

➢ You can also send a **Message** if you need to follow up or provide more information, documents, pictures, etc. related to the **Action Item.**

Community Portal - Presidential Valley Property Owners Association

Test User 👤 ▼

My Items > XN 1167770

Architectural Review 🖉

Architectural Request

6' dog ear privacy fence - See my request attached to build a fence for my backyard

Messages

✉ Type a message

	09/08/2021 5:23 PM
	Email
This item has been automatically advanced	
	🖉 09/08/2021 5:22 PM
See my request attached to build a fence for my backyard	

Homeowner
Tim Wilson

Account
888133887

Property Address
1913 Pennsylvania Ave

ARC Type
Fence

➢ Your **Calendar & Events** page is where you can go to find information of upcoming meetings, events, clubhouse reservations (If applicable) or important dates for your community.

➢ There are four viewing options for this page: **Day**, **Week**, **Agenda**, or **Month**. When you first visit the page, it will start you with the **Agenda** view of the **Current Month**.

➢ Use the **Left/Right Arrows** (◄ ►) located next to the dates shown in blue to scroll between months. You may also click on the date to get more specific with your search.

➤ Looking for your communities Governing Documents, Modification Request Form, Community Disclosure information for the sale of your property, or something else? Your **Documents** page provides you with 24/7/365 access to view, download, or print these documents.

➤ When on your **Documents** page you will see a list of **Folders** to select from and to the right of the folder name it will state how many files are contained within that folder.

➤ Not sure where to look, but know the **Document** you are looking for? Use the **Search Box** located at top right of page to type in a **Keyword** and let the system locate it for you! It will list all possible matches for you. If your initial search does not provide any results, try using a different **Keyword**.

➤ Still not finding what you are looking for? Please **'Submit a Request'** and we'll be glad to assist you!

Documents		Test User 👤 ▾
		Search 🔍
Name	**Number of files**	**Last Update**
📂 Amenities	1	07/20/2020
📂 Budget	0	09/09/2021
📂 Community Association Disclosure	0	09/09/2021
📂 Financials	5	08/31/2021
📂 Forms	1	09/01/2021
📂 Governing Documents	1	07/16/2020

Sidebar:
- Dashboard
- My Contact Info
- Billing
- My Items (10)
- Calendar & Events
- Directory
- Documents

DIRECTORY

➤ The **Directory** page on the Owner's Portal, when enabled for your community, is a resource area for ownership names and/or contact information on file. The property owners chose what is to be displayed on these pages and can update those choices at any time.

➤ To update your **Directory** preferences, visit your **'My Contact Info'** page. To protect everyone's privacy the default preferences will hide your contact Email & Phone number(s), and you must "Opt-In" to show this information on the Directory. Any box(es) checked in green (🟩) will **Hide** that information. Once your preferences are set click **Update** to save your changes.

➤ On the **Directory** page utilize the large **Search** field at the top of the page if you know all or part of what you may be looking for and the system will display all possible results. Each information column also has a search field located at the top with filter additional search options (▼) next to it.