Every Report. One Owner. A Clear Answer.

A simple maintenance request routine for HOA boards and management teams

A maintenance report doesn't become a completed request just because somebody heard about it. Use this routine to make the next step visible and tell residents what happened.

1. Capture the report

Put routine issues in the shared tracker, whether they arrive through the resident form, phone, email, text, voicemail, or in person. Include the location, description, date received, and contact details needed for follow-up. For immediate danger or a serious building hazard, use the emergency process first and document the event afterward.

2. Assign the next step

Give each open request one staff owner. Record a specific next action and follow-up date. If you're waiting for a vendor or board approval, keep the same owner responsible for checking back.

3. Tell the resident what is happening

Acknowledgment: Thanks for reporting the issue at [location]. We've recorded it and assigned it for review. We'll update you when we know the next step.

Delay update: The next step is waiting on [vendor/approval/inspection]. We're following up and will update you again by [date].

Completion: The issue at [location] has been addressed. [Briefly state what was done.] Please let us know if the problem continues.

Don't promise repair dates that haven't been confirmed. When the status changes, keep the resident's understanding up to date.

4. Close the loop

Record the outcome, date resolved, and last resident update. Mark **Closed** when the resident has been informed or a clear reason for not contacting them is documented. A request waiting on a vendor is not closed.

5. Review what's still open

Daily or each staffed day: Check **New**, **Overdue**, **Due today**, and requests without an owner or follow-up date.

Weekly: Review old requests, repeating problems, and vendor or approval delays.

Monthly board review: Share totals, aging, unresolved urgent issues, and decisions needed. Keep resident contact information and private notes out of public reports.

The standard: Residents can report a problem in a familiar way. Management has one record. Someone owns the next step. The resident gets an answer.

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