Set Up Your HOA Maintenance Request Toolkit

A simple way to collect reports, keep track of the next step, and close the loop with residents.

A homeowner notices a problem and tells someone. The real test of your maintenance process comes afterward: Does the report reach the right person? Is the next action clear? Does anyone follow up? And does the resident hear what happened?

This free toolkit helps a small community answer those questions with a shared tracking sheet, a resident request form, and a printable QR-code poster. It works in your own Google account. You don't need a Max Condo Club account.

Before you begin

You'll need a Google account for the connected version, your community's name, a routine contact method, and a phone number residents should use for urgent building issues. Decide who is responsible for checking new requests. Keep your spreadsheet private to authorized staff or board members.

This toolkit is for routine, non-emergency maintenance. If someone is in immediate danger, call 911. Use your association's established emergency procedure for urgent building problems. Never rely on a form submission as emergency dispatch.

1. Make your own tracker

Open https://docs.google.com/spreadsheets/d/1_a3CxxmdxBKtIHzZiXsuB69DwvnXTsYShTH51_wKY00/copy. Google Sheets asks you to make a copy. Save it in the Google account that will manage your community's maintenance records, and give the copy a recognizable name such as **[Community Name] Maintenance Requests**.

Open the **Start Here** tab. Enter your community name, management office contact, routine request contact, emergency phone number, and time zone. Choose a person or role responsible for reviewing new requests.

Your copy is your community's private file. Max Condo Club does not need access to it.

2. Connect your resident form

In your copied tracker, open the **HOA Toolkit** menu and select **Set Up My Community**. Follow Google's permission prompts. The setup creates a new resident request form and connects it to your tracker.

The permissions let the setup create and maintain your Google Form and its linked spreadsheet workflow. Review what Google asks you to approve. No MCC account, payment information, or access to your email inbox is required.

When the setup finishes, return to **Start Here**. You see the resident form link, a private form editing link, and a connection status.

Important: A form link and a spreadsheet are not automatically connected merely because you downloaded them. Use the setup process in your copied Google tracker. If the connection status says **Needs attention**, use **HOA Toolkit > Check Connection** or **Repair Connection** before sharing the form.

3. Check the form before sharing it

Open the private form editing link from **Start Here**. Confirm the community name and emergency phone number are correct.

Check the responder settings. The published form must be available to people outside your management organization's Google account, if that is how your community intends to use it. Do not require sign-in, limit responses to one per Google account, or include a file-upload question.

Copy the **responder link**, not the form editing link. Open the responder link in a private browser window or on a phone that is not signed in to the owner's Google account. You should be able to see the questions and submit a request.

If your organization's Google Workspace policies restrict outside responses, contact your Google Workspace administrator or use an account that permits the intended public access. Do not place the QR poster until a real external submission works.

4. Submit a test request

Use the public resident form to report a clearly marked test issue, such as **TEST: hallway light**. Complete the required fields and submit.

Open the **Requests** tab in your tracker. The test report appears with its own Request ID, source **Resident Form**, intake channel **Form**, and status **New**. The dashboard counts it as an open request.

If the test appears only in a raw Form Responses tab, or does not appear at all, run **HOA Toolkit > Check Connection**. Use **Repair Connection** if instructed. Do not launch until a second real test submission reaches **Requests** correctly.

Once you're satisfied, remove the test entry using the toolkit's documented test cleanup action or clearly close and archive it so it does not distort your live figures. Don't delete or reorder production rows by hand.

5. Make a QR poster for your community

Open https://maxcondoclub.com/resources/hoa-maintenance-request-toolkit/poster. Enter your community name, its tested public resident form link, and the real emergency or after-hours phone number. Add your management office name if you want it shown.

Generate the poster, download the PDF, and print it on US Letter paper. Scan the printed QR code with a smartphone before posting it. The scan must open **your** public form, not the private tracker or form editing screen.

Place posters where reporting information is useful: near a mailroom, community entrance, clubhouse, or other approved common area. A QR poster is an additional reporting option, not a replacement for the telephone or your emergency contact procedures.

6. Record phone calls, emails, texts, and walk-up reports

Residents won't all use the same method, and that's fine. When someone reports an issue directly to staff, open the **Staff Entry** tab.

Select how the report reached you, enter the resident's details when available, describe the issue and its location, and select **Add to Requests**. The tracker creates a permanent Request ID. That staff-entered item lives in the same **Requests** list as submissions from the Google Form.

For an email or text, record the facts of the report accurately; don't ask the resident to repeat the same information just to satisfy your process. Keep any original messages in your normal business record if your policies require them.

The free toolkit does not automatically turn incoming emails, texts, or voicemails into requests. Staff record those channels manually.

7. Keep requests moving

Review **New**, **Overdue**, and **Due today** items regularly. For each report, assign someone responsible for the next action. Record what they need to do and when they'll review the issue again.

If a vendor is needed, set status to **Waiting on Vendor**, but keep a named owner on your team. If a board decision is required, use **Waiting on Approval** and identify the next step. A status alone isn't a follow-up plan.

When the work is addressed, record the outcome and mark the request **Resolved**. Tell the resident what happened, record that communication, and then mark it **Closed**. If the problem still needs work, keep the request open.

8. Give the board a useful picture

The **Dashboard** shows open work, overdue follow-ups, requests waiting on vendors or approval, and how long outstanding issues have been sitting in the log.

Use the monthly board review to focus on exceptions: recurring problems, urgent unresolved issues, long delays, or decisions the board needs to make. Avoid circulating resident names, contact details, or private notes in public board packets.

Troubleshooting

The form asks residents to sign in. Check that responder access is not restricted to a Google organization, the form isn't limited to one response, and there are no file-upload questions. Test from a signed-out browser.

A submission doesn't appear in Requests. Check whether it arrived in the private raw response tab. Then run **HOA Toolkit > Check Connection** and **Repair Connection**. Don't create a second form or paste raw submissions into your working tracker without checking for duplicates.

The QR code opens the wrong page. Regenerate the poster with the published **responder** link. Don't use the private form editing link or the spreadsheet URL.

The workbook says the connection needs attention. Confirm you're using your own copied sheet, that initial permissions were completed, and that your Google account allows the setup. Re-run the toolkit's connection check.

The numbers seem wrong. Check whether a test request remains open, whether a request has a follow-up date, and whether resolved work still needs a final closeout. Closed work appears in completed figures rather than outstanding work.

One final habit

A spreadsheet cannot make someone follow up. The person who reviews new requests, assigns an owner, and updates the resident is what turns a report into service.

Use the toolkit to make those responsibilities visible. That is how a community moves from **“I told someone”** to **“It's handled.”**

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