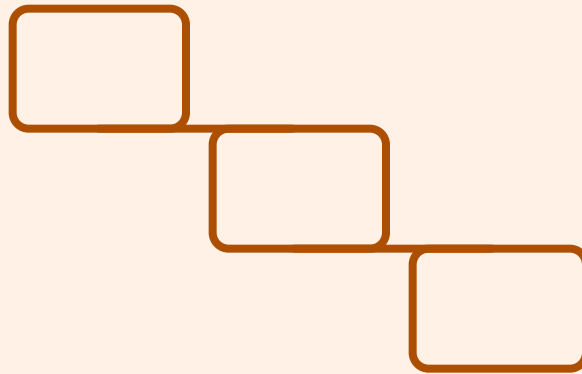


From request to resolution: architectural and maintenance workflows

Give each request a clear path from intake to assignment, decision, completion, and record keeping. Keep architectural review, ordinary maintenance, emergencies, and accommodation requests on the right paths.



A PRACTICAL GUIDE + WORKSHEET

Associations coordinating owner requests and shared-property work

Use one intake route, then classify the work

Collect a description, location, contact, useful photos or documents, and the requested outcome. Assign a reference so the resident and board can discuss the same issue. Avoid collecting unnecessary personal information. A shared intake does not mean every request follows the same decision process.

Classify the request early: association maintenance, owner responsibility question, architectural change, possible emergency, or a sensitive accommodation issue. An emergency should reach the appropriate emergency or professional response route immediately; it should not wait in an ordinary board queue. This guide is not an emergency-response or engineering manual.

Make authority and responsibility visible

Identify who may investigate, request more information, approve spending, authorize a change, or issue a decision. A committee may review a submission without having final approval authority. Record the relevant document or policy and have counsel resolve unclear responsibility or process requirements.

For an architectural request, use a completeness checklist drawn from the applicable standards and verified rules. For maintenance, identify the asset, symptoms, prior work, warranty, and access needs. Fair-housing accommodation requests can require a separate legal analysis; do not automatically treat them as an ordinary aesthetic exception or demand public discussion of medical information.

Keep reserve planning and maintenance connected

The Foundation's maintenance report distinguishes preventive maintenance, inspections, and reserve studies. A reserve estimate does not replace a maintenance schedule or a professional investigation of a new condition. Record recurring inspections and service tasks separately from capital replacement assumptions.

When work is assigned to a vendor, define the scope and what evidence will demonstrate completion. Record approval, quote, scheduling, access arrangements, change orders, and warranty information. Protect residents' private details when sharing a work order. A vendor marked "scheduled" is not the same as work verified complete.

Close with evidence and a usable history

Before closing, confirm the authorized work or decision, record the outcome, and tell the resident what happened or what remains unresolved. If the issue belongs to the owner, explain the responsibility finding and appropriate next route without making an unsupported legal determination. Preserve denial or approval reasons where required.

Link repeat reports to the asset history rather than losing them in a new inbox thread. Review requests that are waiting for information, awaiting a board decision, with a vendor, or overdue for follow-up. Status categories should describe real next actions, not create the appearance that work is progressing when no person owns it.

A repeatable working process

- 01 Capture the issue, location, contact, evidence, and a stable reference.
- 02 Classify the request and route emergencies or sensitive matters appropriately.
- 03 Verify responsibility and decision authority before promising approval or work.
- 04 Assign the next action, owner, supporting scope, and follow-up date.
- 05 Verify the outcome, communicate it, and preserve the asset or request history.

A worked example

Illustrative example: A resident reports a recurring pool-area leak. The intake owner links it to the prior repair, routes a possible hazard to the appropriate professional, and separates immediate response from the later funding discussion. The vendor receives the approved scope and access instructions. The record closes only after the responsible person reviews the result and stores the invoice and warranty information.

Adapt the example to your documents, approved authority, service scope, and local requirements.

Make the plan your own

Use this writing space with your team. Keep private owner information and account secrets in an appropriately restricted system.

Request reference / classification / received date

Responsibility source / decision authority / open question

Next action / assigned person / follow-up

Vendor scope / approval / completion evidence

Resident update / outcome / record location

Before you call it complete

- ☐ Request classification recorded
- ☐ Urgent issues have a separate response route
- ☐ Responsibility and authority checked
- ☐ Sensitive requests handled privately
- ☐ Scope and approval retained
- ☐ Follow-up dates visible
- ☐ Completion evidence reviewed
- ☐ Repeat issues linked to asset history

Keep the evidence with the plan

Original EasyHOA editorial guide, edition 1.0. Published and sources consulted October 29, 2026. The workflows, fictional examples, and worksheets are our own; the sources below provide background and jurisdiction-specific reference material.

Foundation for Community Association Research: Community Association Maintenance

Explains why reserve studies, preventive maintenance, and inspections serve different purposes.

<https://foundation.caionline.org/wp-content/uploads/2023/06/BestPracticesReport-Maintenance.pdf>

Illinois Department of Human Rights: association accommodation issues

Discusses disability-related accommodation issues for condominium and cooperative associations.

<https://dhr.illinois.gov/compliance/real-estate-and-housing/real-estate/reasonable-accommodations-and-modifications-guide/section-8-issues-unique-to-certain-housing-providers.html>

Washington Legislature: RCW 64.90.495

A jurisdiction-specific example of records, owner access, and protected information.

<https://app.leg.wa.gov/rcw/default.aspx?cite=64.90.495>

Use the right professional for the question

This is general educational planning material, not legal, accounting, tax, engineering, or safety advice. State law, recorded documents, contracts, and association type can change the right process. Confirm legal and technical requirements with qualified advisers. Worksheets are not legal forms.

Choose one process to improve

Name an owner, agree on a next step, and review the result at your next working session. Preserve the sources and decisions so the next board can continue the work.

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