

TRAINING REFERENCES

STRATA Master Version 9.1 introduces changes to ensure compliance with the Strata Schemes Management Act 2015 and Strata Schemes Management Regulation 2016 for agencies based in New South Wales.

For more information see the Version 9.1 [Release Notes](#) on the Rockend Knowledgebase. For more information on the NSW legislation please visit the [information page](#) we have created for you.

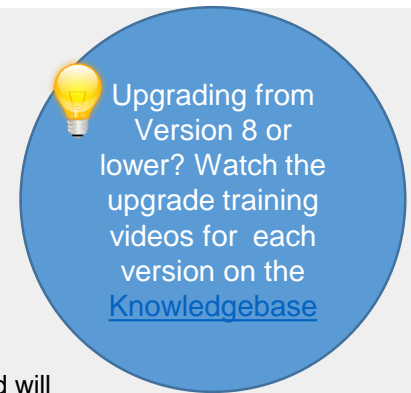
Terminology

Changes have been made to terminology used throughout STRATA Master

Previous Versions	Version 9.1
Sinking Fund	Capital Works Fund
Executive Committee	Strata Committee
Corp Screen > Executive tab	Corp Screen > Committee tab

These changes have been made on reports, messages and onscreen labels and will be shown on upgrade to Version 9.1

NB. General Ledger transaction descriptions prior to Nov 30th haven't been changed



Agency Agreement

Track Agency Agreement expiry dates and notification communications sent to Owners using STRATA Master

Contract Register

- Two new columns, **Communication Sent & Date Sent** have been added to the Contract Register to allow you to record if and when a reminder about the expiring agreement has been sent.
- Update these columns when you notify the Owners.

Reminder

- Set up Reminder Agency Agreement to notify you of Agency Agreements that have an upcoming expiry date.
- The reminder works by looking at the information on the Contract Register

To Track Agreements

1. Add the Agency Agreement to the Contract Register as normal
2. Go to Manage > Reminders Configuration & select Agency Agreement
3. A reminder will be sent if the Communication Sent column on the Contract Register is set to **No**

Committee: Nominated by & Attendance Report

Nominated by

- Record which Lot nominated a Committee member in the **Nominated by** column on the Committee tab of the Corp. screen.
- Select from any other lot in the plan or None.
- On upgrade this field will be set to **None**, you need to update this field manually.
- This information is included on the new **Committee Meeting Attendance Register** report.

Committee Meeting Attendance Register

The report includes:

- Lot details
- Position on Committee
- Voting Rights Name on Title
- Nominators Lot Number
- Lot arrears/ prepaid as at the arrears cut of date

To generate the report, go to:

1. Formatted reports > Strata Mgt Reports
2. Select Strata Committees Meeting Attendance
3. Enter Owners Corp, Meeting date & Arrears cut off

See the [Release Notes](#) for more details.

New Fields for Reporting

Additional fields have been included on the Financial tab on the Corp. screen in STRATA Master Version 9.1 allowing you to record and report on more information:

Funding Proposal Plan

Record details of Funding Proposal Plans on the Corp. screen. This information can be merged to the Information Certificate.

To record information go to:

1. Corp. screen > Financial tab
2. Check the 'Record Funding for Proposal Matters' checkbox
3. Record details of the Proposal in the text box provided
4. Save

Payment Plan Information

Record details of agreed Payment Plans offered to Owners.

To record information go to:

1. Corp. Screen > Financial Tab
2. In the Debt Recovery section, check the 'Payment Plan Approved' checkbox
3. Record details of the Payment Plan in the text box provided
4. Save



All information can be queried via Quick Reports > Corporations

Strata Renewal Committee

Record if a Strata Renewal Committee has been formed and details of the committee. This information can be merged into the Information Certificate.

To record information go to:

1. Corp Screen > Financial Tab
2. Check the 'Strata Renewal Committee' checkbox
3. Record details of the Committee in the text box provided
4. Save

Information Certificate: Section 184

Section 184 of the new Act replaces Section 109.

Template

A template for Section 184 is included in the Templates folder on upgrade to Version 9.1. You will need to attach this to the **Association Type – Strata Plan NSW** before using it.

To change the default template issued for an Information Certificate go to:

1. Configure > Association Types
2. Click the Edit button
3. Select Strata Plan
4. Update Status Certificate field to **Section 184**
5. Update Template name to the name of your template file eg. Section 184.doc
6. Save

You can customise the template prior to first use. Download a copy of the template [here](#).

Form Reports

If you wish to update the name of the report in Formatted reports go to:

1. Configure > Terminology
2. Click the edit button
3. Select "Status Certificate in the Standard term column
4. Update the Local term Field to Section 184
5. Save

The Section 184 template includes new merge fields:

[<< fundingproposal >>](#)

[<< StrataRenewalCommittee >>](#)

[<< StrataRenewalComment >>](#)

See the [Release Notes](#) for more details

Status Certificate Workflow for Section 184

The new Status Certificate workflow makes it easier to calculate any arrears to the time and date of settlement. You can use Quick Reports to view the history of Status Certificate requests for a lot or plan.

Current Owner Account

This is a report produced from the Lot Owner screen that details any interest or arrears owing to date of settlement.

To produce the report:

1. On the Lot Owner screen, Click 'Update Status Certificate' button
2. Enter Date of Settlement
3. Click OK

The Current Owner Account report is produced

See the [Release Notes](#) for more info

To View History

Quick Reports > Lots > Show Status Certificate History

In the results sections you can view:

- The plan/lot number
- Name of requestor
- Time and date certificate was produced
- Amount Due
- Settlement Date

Tenant Meetings

Valid Tenancy

For a tenancy to be identified as Valid in STRATA Master the following criteria must be met:

1. On the Lot Owners screen: Owner Occupied checkbox must NOT be ticked
2. Commencement date for a lease needs to be recorded against the lot
3. Tenant Contact details must be recorded

Is a Meeting of Tenants required?

Identify plans which have 50% or more lots with valid tenancies and the General Meeting is listed in the Register.

1. Quick Reports > Meetings
2. Select Output Option Show plans with 50% or more valid tenancy
3. Select Meeting Type – AGM
4. Search

Notify Tenants

Use Mail Merge to notify tenants of the Tenants Meeting to elect a representative.

1. On the Mail Merge Meetings screen, select the option 'Show Lots with a Valid Tenancy'
2. Select tenants to send a notice of tenant meeting

Meeting Notices

All tenants in NSW Strata schemes must now receive a copy of all General Meeting notices.

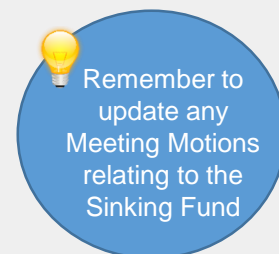
To issue a copy of a General Meeting notice you need to update the Association Type settings in the Configuration screen:

1. Configure > Association types
2. Select STRATA Plan – NSW
3. Check the **Include Tenants in GM Notices** checkbox
4. Save

Issue Notices

When the above option is selected, valid tenants will be included to receive Agenda notices. Tenants will be displayed in **Blue** at the bottom of the Issue screen.

STRATA Master will issue Tenants a copy of the notice with no attachments. Owners will receive a copy of the notice and attachments as normal.



See the [Release Notes](#) for more info

Statement of Key Financial Information

Under the new Act, the Statement of Key Financial Information report must be distributed to the Owners to be tabled at the AGM.

The report can be produced from either Formatted Reports or AGM Preparation.

See the Help file in STRATA Master for more information about the report, including explanations of fields. Search for **Statement of Key Financial Information**.

Levy Wizard - Default Messages

Create default messages to be included in notices issued via the Levy Wizard. This can be set up at the Agency or Owners Corporation level.

To set Default Messages:

1. Configure > Levy Wizard > Agency/ Owners Corp
2. Enter your message for each notice type
3. Save

When producing any notice:

- The Owners Corp Message will display
- The Agency default message displays when no Owners Corp message is set
- You are still able to manually enter a message in the Additional Comments box



After saving a default message, print a sample notice to preview the text and formatting

Rockend Knowledgebase

All staff can now access the Rockend Knowledgebase without needing a username or password.

In STRATA Master go to Help > Knowledgebase or click [here](#) to access the Rockend Knowledgebase

For more information on all of these features, see the [Version 9.1 Release Notes](#) on the Rockend Knowledgebase.

Effective 30 November 2016 the Strata Schemes Management Act 2015 and regulations are enforced for all Strata Schemes registered in New South Wales. Below are links to key reference sites:

Strata Schemes Management Act 2015 - http://www.austlii.edu.au/au/legis/nsw/consol_act/ssma2015242/

Strata Schemes Management Regulation 2016 - <http://legislation.nsw.gov.au/~/-/view/regulation/2016/501/full>

Mandatory Audit Report

Use Quick Reports to easily produce a list of plans that require a mandatory audit at the end of the Financial Year.

To produce the report, go to:

1. Quick Reports > Corporations
2. In the Output Options select 'Calculate Mandatory Audits for NSW'
3. Enter a Financial Year end date in the relevant dates section: This date must be in the past
4. To report on multiple year ends, enter the year end date and hit the Add to Search button.

All plans matching the Financial Year end date will be displayed.

You can identify if and why an Audit is required in the results section. The Mandatory Audit Required column display Yes or No. The Audit Reason displays why an Audit is required.



Sort by the Mandatory Audit column to display all Yes buildings at the top of the results

fileSMART 7.5

- When auto-archiving General Meeting docs from STRATA Master, you can now elect to publish on the Owners & /or the Committee portals
- Filter plans in fileSMART by the status of Managed, Unmanaged or All Plans. This is available in both Archive and Search modes.

For more details, see [What's New in fileSMART](#) on the Knowledgebase

Macquarie Bank - DEFT Update

Changes have been made in STRATA Master to support the Australia Post processing fee charged by Macquarie Bank.