



How PowerStrata can Help During the Current Health Crisis

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STRATA
MANAGEMENT
SOFTWARE

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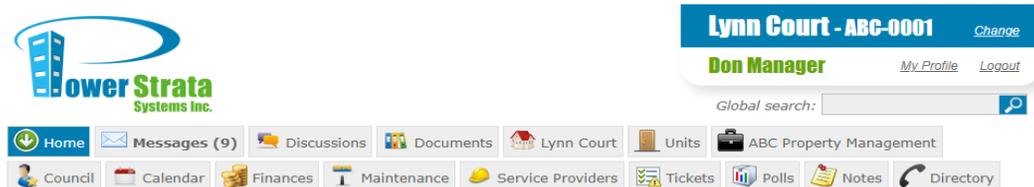
Introduction

Living in and operating a strata corporation has its ups-and-downs at the best of times. The current COVID-19 crisis introduces a whole new set of challenges for stratas. For example:

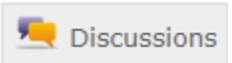
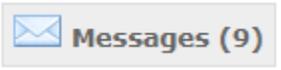
- During the current health crisis, gatherings of over 50 people are not permitted and those with fewer participants may be impractical, due to "social distancing" requirements. This means that for strata corporations, "in person" strata council meetings and annual general meetings (AGM's) may not be possible. But the affairs of the strata must still be managed – bills must be paid, repairs must be done, decisions must be made. How can the business of the strata continue to be effectively managed, without face-to-face meetings?
- Many owners and tenants in stratas want to help their neighbours out during these difficult times. Indeed, crises tend to bring out the best in people. But how do owners and tenants connect with each other to offer or request assistance, or even just to exchange information?
- An urgent matter today is replaced by an equally urgent matter tomorrow. How do strata councils and strata managers quickly and effectively communicate with owners and tenants and keep track of everything that is going on?

PowerStrata has powerful features that can help with these and other challenges!

PowerStrata Can Help!



Here are some of the PowerStrata features that can be used during the current health crisis:

- **Discussion Groups** can be set-up in the system, allowing strata council members, owners and tenants to connect with each other virtually and exchange information securely. **Discussions** may be private for strata council members only or open to all owners and tenants (or any other group). No one outside the strata has access and email addresses are never disclosed. 
- Voting and polling functionality (**Polls**) can be used by strata council members to make important decisions between strata council meetings, without the need to meet in-person. And although **Polls** cannot be used to replace decision making and voting at Annual General Meetings, they can also be used informally to obtain the opinions of owners and tenants in certain circumstances. 
- PowerStrata's **Meeting** and **Document Delivery** functionality can be used to quickly and easily schedule a virtual meeting and send all participants the material they require – including AGM Notices – whether by email, mail or under the door of the strata lot, depending on the recipients' preferences. This scheduling functionality can be used in concert with on-line meeting software like Zoom and GoToMeeting.
- The powerful **Messages** capability of PowerStrata allows the strata council and strata property managers to contact owners and tenants, and owners and tenants to contact the strata council and management – quickly and securely – without ever needing to know or disclose an email address. It's a simple matter to compose a message and send it either to an individual or a large group (or groups) of people. 

PowerStrata is a cloud-based system, meaning you don't need to install any software and you don't need a web administrator! The PowerStrata team looks after all system maintenance and enhancements. Owners, tenants, strata council members and staff of the management company, if applicable, can all access the system from any computer or mobile device with their own username and password. Everyone sees what they are entitled to see based on the [BC Strata Property Act](#) and the [BC Strata Property Regulation](#) and the [Personal Information Protection Act](#) (PIPA).

PowerStrata provides a secure, centralized location for all strata matters, enabling more informed decision making. Records are retained regardless of a change in the strata council or strata property management team.

What is Covered in this Guide?

This guide is intended to help you understand how PowerStrata can be used during these challenging times. Whether you are a strata owner or tenant, a strata council member or a strata property manager, you'll find descriptions of the features that can help you, along with information about how to use them. Links to additional reference material and external resources are also provided where applicable.

How to Use this Guide

In the following three sections of this guide, we identify key PowerStrata features that can be utilized during the current crisis and point you to additional details that are covered in subsequent sections of the guide:

- [How PowerStrata Can Help Owners and Tenants](#)
- [How PowerStrata Can Help Strata Council Members](#)
- [How PowerStrata Can Help Strata Property Managers.](#)

Check these sections first to see how PowerStrata can help you and where to find the related details in the other sections of the guide. Some topics may be applicable to more than one user category, so if you don't find what you are looking for in "your" category, it might be listed in one of the others.

Additional support is readily available by sending a message, in the PowerStrata web portal, to "Technical Support," or by sending an email to support@powerstrata.com. We are here to help and will respond the same business day, or the next business day at the latest.

Some Important Notes:

1. You must be registered in PowerStrata to use the system and benefit from its features! If your strata uses PowerStrata and you are not registered, contact your strata council or strata property manager, give them your e-mail address and ask them to send you a registration invitation today. For strata councils and strata property managers, now is a great time to encourage all owners and tenants to register in the system. Send invitations to all owners and tenants with e-mail addresses simply by clicking on **Invite All** on the Owners/ Tenants page. And why not send a paper notice to owners and tenants who have not yet registered, asking them to provide an e-mail address and register? Use PowerStrata's **Document Delivery** feature to do this! See the PowerStrata [Document and Message Delivery Guide](#) for details on how to do this.
2. There's much more to PowerStrata than what is covered in this guide. If you are a current user of PowerStrata, please refer to our reference guides for information on the many other features, by clicking on the **Documents** Tab, then scrolling down to PowerStrata Manuals. If your strata or management company does not currently use PowerStrata, please click on the following link to request a comprehensive online demo:
<http://www.powerstrata.com/request-a-demo/>
3. Please check the [Condominium Home Owners Association of BC's \(CHOA\)](#) website at the following link for COVID-19 bulletins and information about managing strata meetings during this crisis: <https://www.choa.bc.ca/whats-happening/>

You can subscribe to receive updates and notifications from CHOA by clicking on the following link: <https://www.choa.bc.ca/eupdate/>

4. You can also find information on managing through the COVID-19 crisis on the BC Government Website at the following link: [COVID-19 Information for Strata Housing](#).

How PowerStrata Can Help Owners and Tenants

<p>I would like to offer help to other owners and tenants or check if they are alright.</p> <p>I would like to request help from another owner or tenant.</p> <p>I would like to exchange ideas and information.</p>	<p>PowerStrata’s Discussions Feature allows owners and tenants to “chat” virtually and share information, without disclosing email addresses.</p> <ul style="list-style-type: none"> • Please see PowerStrata Discussions below for more information about this feature. <p>Please contact your strata property manager or strata council if there is a subject you would like to discuss virtually with other owners and tenants.</p>
<p>I would like to contact the strata council or the strata property manager.</p>	<p>PowerStrata makes it easy to contact the strata council and strata property manager.</p> <ul style="list-style-type: none"> • Please see Sending Messages and Keeping in Touch Using PowerStrata below.
<p>I would like to keep informed about what is going on in my strata.</p>	<p>If you are not already registered in PowerStrata, please provide your email address to your strata property manager (or strata council if your strata is self managed). They will send you an invitation to register.</p> <p>By registering in PowerStrata, you will receive all communications, bulletins and notices sent by the strata property manager and strata council. You will also be able to participate in any Discussion Topics and Polls that are made available to you.</p> <p>Everything that is sent to you in PowerStrata is also sent to you by email, so you don’t even need to log-in to stay up-to-date!</p>

How PowerStrata Can Help Strata Council Members

<p>I would like to organize, schedule and hold a strata council meeting remotely, without meeting face-to-face.</p>	<p>PowerStrata has the features to make this easy!</p> <ul style="list-style-type: none"> • Please see Using PowerStrata to Schedule and Conduct an On-line Strata Council Meeting below.
<p>I would like to get a strata council decision made without holding a meeting.</p>	<p>Forget sending around multiple emails! You can do this with PowerStrata Polls and keep all the information in one place. No more searching for multiple emails!</p> <ul style="list-style-type: none"> • Please see PowerStrata Polls below.
<p>I would like to exchange information and ideas with other strata council members.</p>	<p>PowerStrata’s Discussions feature allows strata council members to “chat” virtually and share information privately.</p> <ul style="list-style-type: none"> • Please see PowerStrata Discussions below for more information about this feature.
<p>I would like to hold a virtual discussion with owners and tenants, or another group within the strata.</p>	<p>You can open a Discussion Topic in PowerStrata so that owners and tenants, or any other group in the strata, can discuss a Topic on their own, or with the strata council.</p> <ul style="list-style-type: none"> • Please see PowerStrata Discussions below for more information about this feature.
<p>I would like to inform owners and tenants about what is going on and the special things we are doing during this crisis.</p>	<p>There are a variety of ways to reach owners and tenants through PowerStrata.</p> <ul style="list-style-type: none"> • Please see Sending Messages and Keeping in Touch Using PowerStrata below.

How PowerStrata Can Help Strata Property Managers

<p>I would like to organize, schedule and hold a “virtual” AGM by restricted proxy.</p>	<p>PowerStrata makes it easy to schedule a general meeting and send the meeting notice to all owners, whether by email, regular mail or delivery to the strata lot.</p> <ul style="list-style-type: none"> • Please see Using PowerStrata to schedule a “Restricted Proxy” Annual General Meeting or Special General Meeting and Deliver the Meeting Notices below.
<p>I would like to organize and attend strata council meetings remotely.</p>	<p>PowerStrata has the features to make this easy!</p> <ul style="list-style-type: none"> • Please see Using PowerStrata to Schedule and Conduct an On-line Strata Council Meeting below.
<p>I would like to get a decision from a strata council without holding a meeting.</p>	<p>Forget sending around multiple emails! You can do this with PowerStrata Polls and keep all the information in one place. No more searching for multiple emails!</p> <p>Please see PowerStrata Polls below.</p>
<p>I would like to work remotely from the office.</p>	<p>PowerStrata is a cloud-based system, meaning you don’t need to install any software and you don’t need a web administrator. You can access the system from any computer or mobile device simply by opening a browser, navigating to https://pms.powerstrata.com/login.htm and entering your Username and Password.</p>
<p>I would like to communicate with owners and tenants and keep them informed, in one strata or many.</p>	<p>There are a variety of ways to reach owners and tenants through PowerStrata. For any topic, you only ever need to send one Message in PowerStrata, whether it is intended for one owner in a strata or all owners in all your stratas.</p> <p>Please see Sending Messages and Keeping in Touch Using PowerStrata below.</p>

PowerStrata Discussions

What is a PowerStrata Discussion?

A PowerStrata **Discussion** is an electronic forum that allows a group of people in a strata community to share information and ideas. A **Discussion** can be open to any group or configuration of people – from two people to everyone in the strata.



PowerStrata **Discussions** are ideal for strata council members to discuss topics privately between strata council meetings, or for owners and tenants to exchange information and thoughts at any time.

A PowerStrata **Discussion** is completely private to the members of the group. Only they can enter the discussion and participate.

A **Discussion** in PowerStrata is much better than sending emails back and forth, because email addresses are never disclosed and because the entire “conversation” is maintained in one place, including files such as documents and pictures. There is no more sifting back and forth between multiple emails.

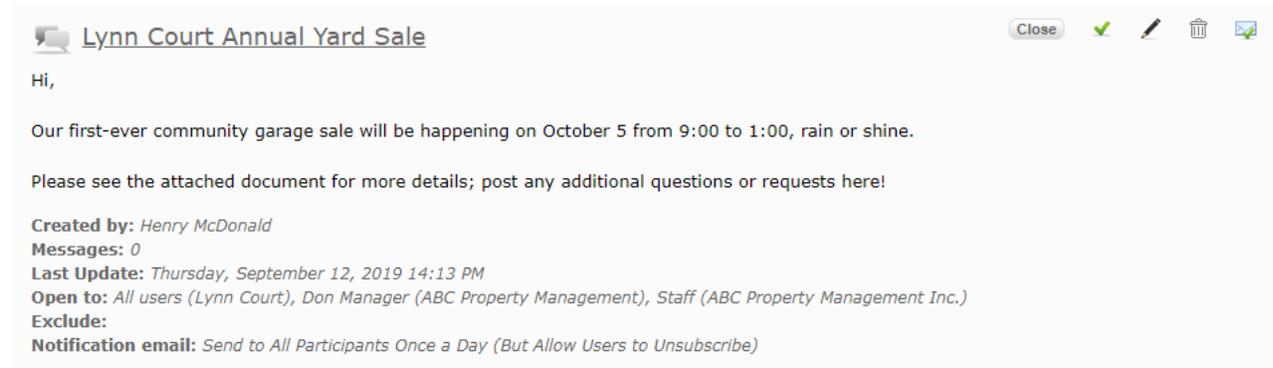
PowerStrata **Discussions** are also much safer and much more practical than setting up a Facebook Group or holding some other kind of “on-line” discussion between members of a strata community. These “external” sites present serious privacy issues for the strata and are not recommended by the Condominium Home Owners Association of BC (CHOA) and other strata experts. As CHOA Executive Director Tony Gioventu wrote in a [Condo Smarts article](#), they are difficult if not impossible to control and it is difficult to prevent abuse. With PowerStrata Discussions, privacy is assured and any person who abuses the “rules” of the discussion can be removed.

How does it work?

First, a strata council member or strata manager creates a **Discussion Group** and defines the people to which the **Discussion Group** is open. (Only those people can “see” the **Discussion Group** in PowerStrata.)

Then, related **Topics** are added to the **Discussion Group**. A **Topic** may be open to the same or different groups and people as the **Discussion Group**. For example, a **Discussion Group** might be open to all strata council members, but a specific **Topic** within the **Discussion Group** might be open to not just the strata council but also all owners and tenants.

A **Discussion Group** is a “category” containing one or more related **Topics**, which are the individual conversational threads within a **Discussion Group**. A **Topic** is where the conversation happens. For example, A **Discussion Group** named “Coronavirus” might be created for owners and tenants to converse about the current crisis. One **Topic** named “Assistance” could be created, for owners and tenants to contact each other to offer or request assistance. Another **Topic**, named “General Information” could be created for owners and tenants to exchange general information about the crisis.



The screenshot shows a discussion group interface. At the top, there is a title bar with a speech bubble icon, the text "Lynn Court Annual Yard Sale", and several action icons: "Close", a green checkmark, a pencil, a trash can, and a blue checkmark. Below the title bar, the text reads: "Hi," followed by "Our first-ever community garage sale will be happening on October 5 from 9:00 to 1:00, rain or shine." Below that is "Please see the attached document for more details; post any additional questions or requests here!". At the bottom, there is a metadata section: "Created by: Henry McDonald", "Messages: 0", "Last Update: Thursday, September 12, 2019 14:13 PM", "Open to: All users (Lynn Court), Don Manager (ABC Property Management), Staff (ABC Property Management Inc.)", "Exclude:", and "Notification email: Send to All Participants Once a Day (But Allow Users to Unsubscribe)".

Within a **Topic**, **Messages** and files can be posted by all those to whom the **Topic** is open. The **Messages** are the comments that each participant adds to the **Topic**.

E-mail notifications can be sent to participants when there are new **Messages** and files, but each participant can control whether or not they wish to receive notifications for each **Topic**, as well as the frequency.

It’s even possible to post a new **Message** right in the e-mail notification, without logging in to the system.

Who can do what with PowerStrata Discussions?

- **Discussion Groups** can only be set up by strata council members and strata property management users.
- Within a **Discussion Group**, **Topics** can be created by those to whom the **Discussion Group** is open.
- All those to whom a **Topic** is open can view all the **Messages** and files in the **Topic** and add their own.

In this way, **Discussions** are highly configurable. Any group of users, from one owner to everyone in the strata, can participate in a **Topic**.

More Details and References

For complete “how to” details on creating **Discussion Groups**, adding **Topics** and participating in **Topics** by adding **Messages** and files, please refer to the [PowerStrata Messages Guide](#). Owners and tenants can also refer to the [PowerStrata Residents Guide](#).

These guides can be found in PowerStrata by clicking on the **Documents** Tab and scrolling down to the PowerStrata Manuals section.

PowerStrata Polls

What is a PowerStrata Poll?

[Dictionary.com](https://www.dictionary.com) defines a "Poll" as:

- a ... collection of opinions on a subject, taken from ... a selected ... group of persons, as for the purpose of analysis, or ...
- the registering of votes, as at an election.

In PowerStrata, you can collect opinions and register votes from strata council members or owners, or any other group of people in a Strata, by using the **Polls** feature.

Polls are an ideal way of obtaining approvals from strata council members between strata council meetings. For example, if it is necessary to decide on a matter before the date of the next strata council meeting, a **Poll** can be sent to all strata council members to get them to either approve or reject it. (Always remember to document these types of decisions in the minutes of the next strata council meeting. Decisions made between strata council meetings are not legal and enforceable until this is done!)

You can also use **Polls** to collect opinions from all owners or other groups such as tenants or a committee.

For example, perhaps a choice is to be made between two common property hallway carpet samples that are on display in the lobby, for an upcoming renovation project. You could send out a **Poll** to all owners, asking them to choose between Sample "A" and Sample "B."

During the current crisis, PowerStrata **Polls** are a good way of obtaining votes and opinions, without having meetings.

Important: [The Strata Property Act](#) requires certain matters to be decided upon by a majority or 3/4 vote of owners at a general meeting. **Polls** are not a replacement for making these kinds of decisions. You must hold an annual or special general meeting for this purpose. For example, you cannot use a **Poll** to approve or change a budget, approve a major expenditure, defer a Depreciation Report, approve a significant change to the use or appearance of common property, etc.

Topic Description
When should we have our annual BBQ?

Files
No file has been uploaded for this topic.

Vote
Poll will close on: **Apr 4, 2020 (Midnight)**
Participation: **6% (2 votes)**

June 1, 2020
2 / 31 6%

July 1, 2020
0 / 31 0%

[Cast Your Vote](#)

Note: If a strata council is just looking for comments from owners (not a decision), setting up a **Discussion Topic** for all owners might be a better option. For example, perhaps the strata council is considering a bylaw revision for possible approval at the next annual general meeting. They could open a **Discussion Topic**, attach the draft bylaw and ask owners to provide their comments. See the Previous Section on [PowerStrata Discussions](#).

How Does it Work?

Polls may be created by strata council members and strata property managers. In general, the creator of the **Poll** defines:

- The question to be answered.
- The choices (answers) that are available to each voter. (A voter can select only one answer.)
- The participants. This can be any group or combination of people in the strata.
- Whether each vote (ballot) is secret or whether the ballots are open for all participants to see.
- The deadline to vote. (After this date, voting will not be possible.)
- Who can see the results of the **Poll**.

When the **Poll** is “opened,” the participants all receive a notification by email. They can vote right in the notification and add comments, without logging-in to PowerStrata. The participants can also see the **Poll** on their homepage in PowerStrata and click on it to vote, if they prefer.

PowerStrata (Lynn Court)

IMPORTANT: Do not reply to this email. Please press the Vote button to see options and cast your vote.

Annual BBQ!

When should we have our annual BBQ?

This poll will be closed on April 4 at midnight.

VOTE

Some options that are available:

- Each **Poll** automatically opens a corresponding **Discussion Topic**. Participants can comment on the Poll, either in addition to voting or instead of voting, by adding comments (**Messages**) to the **Pole Discussion Topic**.

- Documents and files can be added to the **Poll**, by adding them to the related **Discussion Topic**. This is a great way to provide access to material that the participants might need to review in order to decide on their answer. A **Poll** can even be used specifically to obtain approval for a document. Remember to add any documents and files before opening the **Poll**. They cannot be added once it is open.
-

Who can Participate in a PowerStrata Poll?

- **Polls** can only be created by strata council members and strata property managers.
 - Anyone in a strata can participate in a **Poll**, if it is opened to them by the **Poll** creator. When a **Poll** is created and opened, the participants will receive an e-mail notification and will see the **Poll** on the PowerStrata homepage. They can vote and comment either right in the e-mail or by clicking on the link on the homepage.
-

More Details and References

Please see the [PowerStrata Polls Video](#). This video provides a step-by-step guide for creating **Polls** in PowerStrata.

Sending Messages and Keeping in Touch Using PowerStrata

Overview

At any time, enabling and maintaining effective communication channels between stakeholders is a key to building a great community. Communicating frequently is another.

During times of crisis, communication becomes even more important. This is as important for strata communities as it is for any other.

It's no accident that PowerStrata provides a range of powerful communications options for any stakeholder group, including owners and tenants, strata councils, committees and strata property managers.

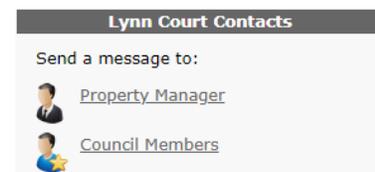
In addition to the **Discussions**, **Polls** and **Document Delivery** features that are described elsewhere in this guide, a number of other communications options are available for more informal or ad-hoc communications, as well as for regular communications that may be required.

We describe these other options below.

1. Message Links on the Home Page (Strata Contacts)

The strata council and property management staff can configure the home page to include message links (**Strata Contacts**). These links can then be used by owners and tenants to send messages directly to either the strata council members or the strata property manager. The owner or tenant simply clicks on the link and then completes the message form, which is similar to sending an e-mail in an e-mail client like Gmail, Hotmail or Outlook. The strata council members or strata property manager will then receive the message in their PowerStrata Inbox. In addition, they will receive an email at their registered email address. They can respond from either place. Regardless, the response will be saved as a message response in PowerStrata.

The **Strata Contacts** appear on the **Council** tab under **Communications Options** and can be configured (along with other **Communications Options**) by property management staff and by strata council members of self managed stratas.



Communication Options

Edit Options

	- Owners can contact the Property Manager through web portal - Display shortcut on Home Page to contact Property Manager	Yes No
	- Owners can contact the Council Members through web portal - Display shortcut on Home Page to contact Council Members	Yes No
	- Council Members can contact all owners through web portal - Allow Council Members to use "Reply All" on emails sent to all owners	Yes Yes
	- Council Members can contact contractors through web portal	No

The **Communications Options** that can be set are as follows:

Communications Option...	What it does...
Owners can contact property manager through the web portal	The strata property manager appears as a recipient that can be selected when owners (and tenants) compose a message.
Display short cut on home page to contact property manager	A link appears in the Strata Contacts block on owners' (and tenants') homepages, allowing them to create a message automatically and send it to the strata property manager.
Owners can contact council members through the web portal	The strata council members appear as recipients that can be selected when owners (and tenants) compose a message.
Display short cut on home page to contact Council Members	A link appears in the Strata Contacts block on owners' (and tenants') homepages, allowing them to create a message automatically and send it to the strata council members.
Council members can contact all owners through the web portal	Owners (and tenants) appear as recipients that can be selected when strata council members compose a message.
Allow council members to use "reply all" on emails sent to all owners.	By setting this option to "no," strata council members are prevented from inadvertently sending replies to all owners (and tenants), on emails sent to all owners (and tenants).

Communications Option...	What it does...
Council members can contact contractors through the web portal	Contractors with profiles in PowerStrata appear as recipients that can be selected when strata council members compose a message.

2. Message Box

A **Strata Message Box** can be set up by the strata council and property management staff. All owners and tenants then have the ability to click on the link and send a message to the box. When configuring the box, the strata council and strata property manager can define who can receive and read the incoming messages and who can send messages from the **Strata Message Box**.



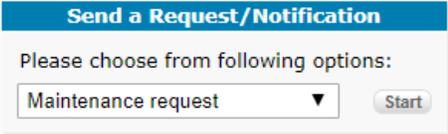
Owners and tenants do not have to be logged in to PowerStrata in order to send a message to this box. Instead, they can send an email to the **Strata Message Box**, using the email address in the format of strataplannumber@pms.powerstrata.com. For example, VR9999@pms.powerstrata.com. However, the email must be sent from an email address that is registered for the owner and tenant in PowerStrata. This is to prevent unwanted spam in PowerStrata.

The **Message Box** does not need to be used for communications to and from the strata council. For example, you could call it "Property Manager Message Box," set the receiver to the strata property manager and set the strata property manager to be the person who can send messages from the **Message Box**.

However, the big benefit of using a **Message Box** for communications to and from the strata council is that the messages sent and received are retained permanently. As strata council members come and go, the messages stay in the box for "new" members to reference as needed. Retention of "correspondence" by a strata corporation is also a requirement of the [Strata Property Act \(Section 35\)](#).

3. Send a Request or Notification directly from the Homepage:

Strata council members and strata property managers can add a **Send a Request/ Notification** block to the Homepage. A set of one or more **Requests/ Notifications** can then be configured to appear in the

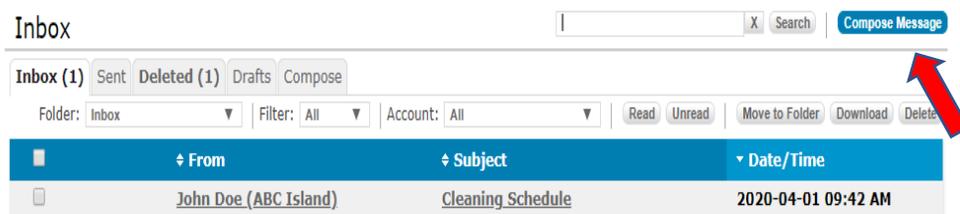


drop-down list in the block. For each **Request/ Notification**, the strata council member or strata property manager can define who is able to see it in the drop-down list and who will receive the “request.” It can even be configured to cause a ticket to be created and automatically assigned to a specific person.

This is a great way to automatically direct requests to the right person, without the “sender” needing to know who must receive it. For example, a “maintenance request” could be configured to be sent directly to the property management assistant. A “bylaw complaint” or an “alteration request” could be sent directly to strata council members. There are endless possibilities!

4. Send a message from the PowerStrata Messages Tab:

All PowerStrata users can send messages by clicking on the **Messages** tab and then “**Compose Message**.”



Sending a message is similar to sending an e-mail, however the user can only send the message to pre-defined users and groups who exist within the strata. For example, an owner or tenant can send a message to the strata property manager, the strata council members or a committee, such as the “landscaping committee.”

The strata property manager has the ability to send a message to a wide choice of recipients. A message could be sent to only one owner, all owners in a strata, or even all owners in all stratas managed by the property management company. Of course, documents can be attached to the message.

Paper copies of messages sent by the strata council and strata property manager can also be delivered or mailed to owners and tenants who are not registered in PowerStrata or who do not wish to receive emails, by using the **Document Delivery** feature.

5. Post a Note

Sometimes there is a need to share information without sending messages and emails. For example, owners and tenants need to have ready access to emergency contact numbers and procedures, especially during a crisis event. If these are sent in a message or email, they are likely as good as lost a few days later.



PowerStrata has a **Notes** section where you can post information that is not time sensitive but that needs to be available to a specific group of people on an on-going basis. It's also possible to post a Note on the home page of certain users, for a specific period of time.



The strata property manager and strata council members of self-managed stratas can post **Notes** and define which user groups can see them. These users will then be able to see the **Notes** either by clicking on the **Notes** tab or on their homepage, if the note has been configured to appear there.

6. Using e-mail externally from PowerStrata

Whenever a message is sent in PowerStrata, an e-mail is also sent to the recipient's corresponding e-mail address (stored in their PowerStrata profile). The recipient then has the option to respond, either to the message in PowerStrata or to the e-mail. In either case, the response is recorded as a response to the message in PowerStrata.

There is also a way to enable owners and tenants to send new messages without logging-in to PowerStrata. Each PowerStrata user has an e-mail address, which consists of their **Username** and strata plan number followed by @pms.powerstrata.com. For example: johndoe.VR9999@pms.powerstrata.com. However, the email must be sent from an email address that is registered for the owner and tenant in PowerStrata. This is to prevent unwanted spam in PowerStrata.

Alternately, a person such as the strata property manager can provide their business email address to owners and tenants without email addresses in the system. However, those emails will then have to be "forwarded" to PowerStrata so that they can be handled and contained within the system.

A better option is to make sure as many owners and tenants as possible have e-mail addresses in their PowerStrata profile and are registered. As we stated earlier in this guide, now is a great time to encourage all owners and tenants to register in PowerStrata!

More Details and References

Please see the following PowerStrata reference guides for “how-to” information on all of the above features:

I want to...	See PowerStrata User Guide and Section ...
Configure the Strata Message Box	Please see the PowerStrata Strata Message Box Guide .
Configure Requests/ Notifications to appear in the Send a Request/ Notification block on the homepage.	This is done by creating a template on the Templates tab within the main Messages tab. <ul style="list-style-type: none">• Please see <i>How to Use Templates</i> in the PowerStrata Messages Guide.
Send messages from the Messages Inbox	Please see <i>Compose</i> in the PowerStrata Messages Guide .
Post a Note .	Please see the PowerStrata Notes Guide .
Use the Document Delivery feature to send paper copies of messages and documents to owners and tenants without email addresses in the system, or who have requested to receive notices at an address outside of the strata plan.	Please see the PowerStrata Document & Message Delivery Guide.

Using PowerStrata to Schedule and Conduct an On-line Strata Council Meeting

Overview

You can use Zoom or another tool to schedule and hold an on-line meeting and use PowerStrata to send the meeting details and notification to all strata council members. All supporting documents for the meeting can be stored in one place and you can even use PowerStrata to conduct and record the votes and decisions made during the meeting.

How Does it Work?

- 1) Sign in to Zoom and “Schedule a Meeting.” Then, on the “Manage Meeting” page, click on “Copy the Invitation.” Copy the meeting URL from the pop-up “Copy Meeting Invitation” page:

```
Join Zoom Meeting  
https://us04web.zoom.us/j/322658695
```

Option: If you use a different on-line meeting tool, perform the equivalent steps.

- 2) Now, in PowerStrata, perform the following steps:
 - a) Create a strata council meeting:
 - Go to the **Strata Council** page, click on **Meetings**, then **Schedule a Meeting**.
 - Select **Council Meeting** in the pop-up and click **Schedule**.
 - Complete all the fields on the **Strata Council Meeting** page. In the **Location** field, type “On-line Meeting” and in the **Notes/ Agenda** field, paste the Zoom meeting link (URL) (as in the example above). If there is a separate agenda for the meeting, you can attach it to the meeting by clicking on **Choose file** beside **Notice** in the **Documents** section at the bottom of the page. Click **Save**, then click **Save and Send Notifications** to notify all the participants (strata council members) of the meeting.

Strata - Council Meeting

Strata Council

Meetings

Meeting * = Required field

Location:

Date: * yyyy-mm-dd

Time: to hh:mm am/pm

Notes/Agenda:

Who Attends

Attendees: Council members (Lynn Court)
 Property Manager (Lynn Court)

Reminders for Attendees

First reminder: 1 week before

Second reminder: 3 days before

Who Else Sees This Meeting on Calendar

Meeting is also visible to: Owners (Lynn Court)

Notifications/Reminders: Select this option if you want these people also receive notifications and reminders about this meeting.
NOTE: **Attendees** always receive notifications and reminders.

Documents

Minutes: No file chosen

Notice: No file chosen

Status

Status: Normal

b) Add a **Ticket** to the **Meeting**:

- On the **Meetings** page or in the **Calendar**, click on the meeting.
- Add a **Ticket** to the meeting by clicking on the pencil (edit) beside **Ticket**.
- In the pop-up, select **Create a New Ticket and link event to it** and click **Update**. The ticket number now appears on the meeting.
- Click on the ticket number in the meeting. Now, the **Ticket** becomes a one-stop source for everything about the meeting

Ticket ABC-0010-0002 - Timeline

All Tickets/Tasks Tickets/Tasks Assigned to Me Support Tickets Templates

Status Report Go to Ticket List Expand All Collapse All

Add: Document/Image Status Update Event Meeting Note Checklist Poll Task Send: Message

Council Meetings

Council Meeting April 14

Ticket: Open
Normal Priority

2020-03-31: N/A

Most Recent Update:

Assigned To: Property Manager (Lynn Court)

Units: add/remove

Assets: add/remove

Ticket Timeline Documents/Files Updates Events/Meetings Notes Messages Checklists Polls Tasks Notification Preferences

T: Ticket | S: Task

Document
Mar 31, 2020

T Test Document (Bylaw Enforcement)

3) You can also do the following:

- Add documents that are related to the meeting and attach them to the **Ticket**, so that all meeting documents are maintained and available in one place.
- Add **Poll(s)** to the **Ticket**. For example, you could add a **Poll** called "Approval of the minutes of the previous meeting." You could either add **Poll(s)** in advance of the meeting or add them during the meeting for resolutions that are moved and seconded and have the strata council members vote "in real time" during the meeting.
- In addition, you can send a message about the meeting from right in the ticket. By doing this, the message and all responses are saved in the ticket.

You can also add **Checklists**, **Tasks** and **Notes** to the **Ticket**. These are explained in the PowerStrata [Tickets Guide](#).

Who can do this?

- Strata council members and strata property manager can create meetings and **Tickets** in PowerStrata, then add additional items to **Tickets** including **Documents**, **Polls**, **Messages**, **Tasks**, **Checklists** and **Notes**.
- Anyone can obtain a free Zoom on-line meeting account that allows them to schedule a meeting of up to 40 minutes. You will need to subscribe to a Zoom plan in order to conduct meetings of longer duration.

More Details and References

- For more information on scheduling meetings in PowerStrata see the PowerStrata [Meetings, Minutes and Notices Guide](#).
- For more information on PowerStrata **Tickets**, see the PowerStrata [Tickets Guide](#).
- For more information on PowerStrata **Polls**, see
 - The [PowerStrata Polls](#) section of this guide
 - The [PowerStrata Polls Video](#)
- [Zoom On-line Meetings](#) (This is the Zoom Website)
- [Here](#) is a video that explains Zoom basics.
- [Here](#) is an article that describes certain privacy considerations when using Zoom, or other on-line meeting tools.

Using PowerStrata to Schedule a “Restricted Proxy” Annual General Meeting or Special General Meeting and Deliver the Meeting Notices

Overview

PowerStrata makes it easy to schedule an annual general meeting, special general meeting or information meeting and deliver the necessary notices and documents, either by mail to the owners’ strata lots or by email and “snail mail” to owners who have provided email addresses or mailing addresses outside the strata plan, for the purpose of receiving such notice.

During the current period, it may not be possible to hold “in-person” general meetings. Gatherings of over 50 people are not permitted and those with fewer participants may be impractical, due to “social distancing” requirements.

Ideally, any meeting that is not urgent should be delayed. However, this is not always possible. For annual general meetings and special general meetings that must be held during this current period (and cannot be delayed), the Condominium Home Owners Association of BC (CHOA) recommends that they be held by restricted proxy. This can allow the meeting to be held with as little as one person participating “in person.”

A “restricted” proxy means that limitations are placed on the proxy. Usually, this means that the owner appointing the proxy identifies, for each matter to be voted on at the meeting, whether the vote is to be in favour, opposed or abstained.

Please see CHOA Bulletin [Managing Coronavirus Risks & Strata Corporation General Meetings](#) which describes how to organize and conduct a general meeting by restricted proxy. (See page 3.)

Using PowerStrata to schedule a “restricted proxy” general meeting and deliver the notices is much the same as for meetings held the usual way, with a few differences. We provide a general description of how to do this below.

How Does it Work?

Here is the suggested procedure for scheduling an annual general meeting in PowerStrata and delivering the meeting notice and proxy form to all owners. In this example, the general meeting is being held by restricted proxy. Also, an on-line information meeting for questions and discussion is being held a week prior to the general meeting.

Steps:

1. Prepare and finalize the general meeting notice and store it locally.
2. Prepare and finalize the notice for the on-line information meeting and store it locally.
3. Determine who will be the nominees for the strata council positions.
4. Determine who will be the designated proxy holder.
5. Create an **Annual General Meeting** in PowerStrata:
 - Click on the **Council** tab, then **Meetings**, then **Schedule a Meeting**;
 - Select "**Annual General Meeting**" in the pop-up and click **Schedule**;
 - Complete the following fields on the Meeting form:
 - **Location**
 - **Date**
 - **Time**
 - **Notes** (optional)
 - **Attendees** (Normally all owners and the property manager. Even though the designated proxy holder may be the only owner attending, all owners must be identified as **Attendees** to generate the meeting notices for all owners).
 - **Reminders**: Adjust the default reminders only if needed
 - **Who else sees the meeting** (optional);

- The strata council nominees.
- Click **“Save”** and then on the pop-up, click **“Save but do not send Notifications.”**

Restricted Proxy Meeting

This is a Restricted Proxy Meeting: Within the limits of the Strata Property Act strata corporations and owners are permitted to convene meetings entirely by proxy; however, this method is frequently avoided due to limited participation and mistrust of owners due to misuse of the proxies.

Designated proxy holder:

Completed proxy must be sent to:
(Leave the options that are not applicable blank)

Email Address:

or Mailing Address:

or drop in the designated ballot box:

By date: yyyy-mm-dd

Located at:

Resolutions or agenda items that require voting instructions:

Strata council nominees:

Status

Status:

6. Create an on-line meeting in Zoom or another on-line meeting tool:
 - Sign in to Zoom and “Schedule a Meeting.” Then, on the “Manage Meeting” page, click on “Copy the Invitation.” Copy the meeting URL from the pop-up “Copy Meeting Invitation” page:

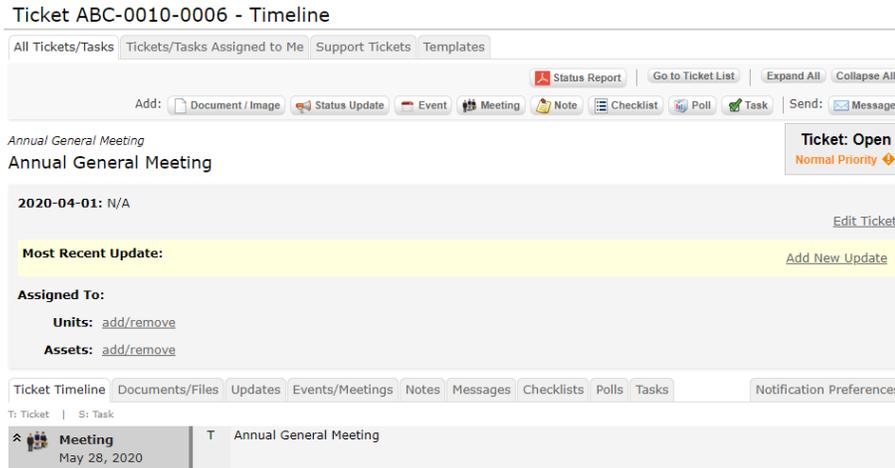
Join Zoom Meeting
<https://us04web.zoom.us/j/322658695>

Option: If you use a different on-line meeting tool, perform the equivalent steps.

7. Create a **Ticket** that is related to the general meeting:

- Back on the **Meetings** page in the **Council** tab, click on **Meetings** and find the annual general meeting in the list. Click on the link to open the meeting.
- Click on the pencil (“edit”) beside **Ticket**. This will create the **Ticket** and add a link to the **Ticket**. Click on the link to enter the **ticket**. In the **ticket** will be a link to the meeting.

By creating a **Ticket** for the meeting, you can keep everything about the meeting in one place.



8. Create an **Information Meeting** from the ticket:

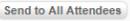
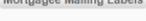
- Click **Add Meeting** and in the pop-up, select **Information Meeting** from the drop-down list. Click **Schedule**;
- Complete the following fields on the **Meeting** form:
 - **Location**
 - **Date**
 - **Time**
 - **Notes:** In this field, indicate that this will be an on-line meeting and paste the Zoom On-line Meeting URL that you copied in step 5 above. Add any other notes as needed.
 - **Attendees** (Likely owners and the strata property manager)
 - **Reminders:** Adjust the default reminders only if needed
 - **Who else sees the meeting** (optional)
 - **Documents** (optional);
- Click **Save**. Now in the **Ticket** will be links to both the general meeting and the

information meeting.

9. Generate the meeting notice and **Hard Copy Delivery Request** for all owners:

- Back on the **Meetings** page in the **Council** Tab, click on **Meetings** and find the annual general meeting in the list. Click on the link to open the meeting.
- Scroll down to **"Notice."** You will see a link to the **Meeting Notice** and a button **"Send to all Attendees."** Click the button.

Annual General Meeting

 Strata Council	Title	Lynn Court - Annual General Meeting
 Meetings	Ticket:	
 Edit	Date	Thursday, June 18, 2020
 Delete	Time	6:00 pm to 7:00 pm
 Notification	Location	Delta Hotel
	Notes/Agenda	
	First reminder	1 week before
	Second reminder	3 days before
	Attendees	Owners (Lynn Court) Property Manager (Lynn Court)
	Also visible to	
	Minutes	 Attach
	Notice	 SAMPLE-Notice-Page-Restricted-Proxy_March-27.doc  Send to All Attendees
	Status	Normal
	General Meeting Tools	 Registration List  Voting Cards  Restricted Proxy  Notice to Mortgagees  Mortgagee Mailing Labels

- The system will automatically generate a message **Compose** form with the meeting notice and proxy form attached. By default, the recipients are the owners and the strata property manager.

notices by email, those with invalid email addresses and those who have specifically requested to receive hard copies.

OR

- o **Yes, To All Recipients:** Use this option if you want to deliver hard copies to all owners.

Do not use the other **Hard copy Delivery** options for a general meeting notice!

The other two options in the grey area (**Deliver Message and Attachments ... To Resident and Non-Resident Recipients**) are the default options and should be left as-is for a general meeting, so that the hard copies of the message, notice and proxy form are sent to all owners regardless of whether they are resident or non-resident owners.

Please refer to *Sending out Messages* in the [PowerStrata Document and Message Delivery Guide](#), for more details about generating the meeting notice and the **Hard Copy Delivery Request**.

- Once you are happy with the message, press **Send**.

10. Complete the **Hard Copy Delivery**:

- Once the message is sent, PowerStrata will review the hard copy delivery settings for the message and will generate a **Hard Copy Delivery Request (Document Delivery)**.

Document Delivery

Inbox (5) Sent Deleted Drafts Templates Doc Delivery Compose

ABC-0010 (Lynn Court) Friday, April 3, 2020 - 10:13 AM
Subject: Lynn Court - Annual General Meeting
From: Technical Support (PowerStrata)
To: Owners (Lynn Court)
Property Manager (Lynn Court) 0%

Document	Copies to Print
Letter	1
SAMPLE-Notice-Page-Restricted-Proxy_March-27.doc	26
rest_proxy.pdf	26

Actions/Filters

- Undelivered Only
- Print Labels & Envelopes
- Delivery List
- Delivery List (CSV)
- Mark as Completed
- Back to List

- Those assigned **Communicator** authority in the strata and/ or the management company will be informed about the new document delivery task by notification email. (See sample below.)
- The **Hard Copy Delivery Requests** enable the **Communicators** to:
 - o See a list of all owners to whom hard copies must be delivered and filter

the list by resident and non-resident owners.

- Easily determine how many copies of the meeting notice and proxy forms should be printed. (Only one copy of the message (which forms the “covering letter” for the meeting notice) needs to be printed since it is a multi page document containing the individual letters for each owner.)
- Print mailing labels for the packages that must be mailed out

In this way, the hard copies can easily be sent to all required owners, either by mail or delivery within the strata.

11. Send the information meeting notice:

- Repeat steps 9 and 10 above, but for the information meeting. (Find this meeting by clicking on the **Meetings** Button on the **Council** Tab.)

Who can do this?

Self Managed Stratas: Strata council members can create the meetings in PowerStrata, create the related **Ticket** and generate the meeting notices. Those users with **Communicator** privilege in PowerStrata can perform the **Document Delivery** steps.

Stratas that are Professionally Managed: Property management staff can perform these functions.

More Details and References

- CHOA Bulletin containing a description of general meetings held by restricted proxy: [Managing Coronavirus Risks & Strata Corporation General Meetings](#)
- For more information on scheduling meetings in PowerStrata, see the PowerStrata [Meetings, Minutes and Notices Guide](#).
- For more information on PowerStrata **Tickets**, see the PowerStrata [Tickets Guide](#).
- For more information on **Document and Message Delivery**, see the PowerStrata [Document and Message Delivery Guide](#).
- [Zoom On-line Meetings](#) (This is the Zoom Website)
- [Here](#) is a video that explains Zoom basics.
- [Here](#) is an article that describes certain privacy considerations when using Zoom, or other on-line meeting tools.

Revision History

Date	Description
April 7, 2020	Minor edits to improve clarity.
April 3, 2020	Initial Release.