VIC Certificates

The instructions in this article relates to **Certificates** which can be found by searching or selecting it from the StrataMax desktop.

The Victorian Owners Corporation Act 2006 which took effect on 1 January 2008 required that templates need to show the following:

- Forms and templates have been amended to show 'Owners Corporation' as opposed to Body Corporate.
- The Form 3 has been replaced by the Section 151 Certificate.
- The levy and arrears notice templates have been amended to comply with the approved forms.
- When referring to Entitlements, Lot Liability means Contribution Entitlements and Lot Entitlement means Interest Entitlement in the Roll and when setting up levies.

It is important to note that there are some specific requirements for the supply of information on the Section 151 certificate. StrataMax has provided the mechanism to deliver the data but its availability and content will need to be managed internally.

The certificate requires provision of the Statement of Advice, the Owners Corporation Rules, and minutes of the last Annual General Meeting. This information can be added to the certificate by using *Document Inclusion*.

Data in the Certificate Requisitions can also be entered for printing on the certificate.

StrataMax has used its best endeavours to create a process for production of the information required under the Owners Corporation Act 2006. However, StrataMax accepts no responsibility for the accuracy of the information contained in the forms or documents, or the completeness of the data. No reliance should be made on the material provided, it is recommended that the data be checked and approved before issuing the certificate.

Edit Requisitions

Edit Requisitions allows certain questions to be answered in the certificate where appropriate.

1. In **Certificates**, select the *Special > Edit Requisitions*.
2. In the 'Extended Answers' screen, click *Insert* and select one of the available questions and click *OK*.

- Delete and Edit can also be used here where appropriate.

3. Enter the details for that question if required, then click OK. This information will appear on the last page of certificate.

4. Enter the text for the answer for that question if required, and click OK. This information will appear in the numbered section of the certificate.

5. Click Close.

Edit Cover Letter - PEXA Payments

The Cover Letter can be edited to include the StrataPay Reference Number for the associated Lot Account so that the details can be used to make payments using the individual unique StrataPay Reference Number and the StrataPay Biller Code or BSB - this transaction will reconcile automatically through the **Bank Rec**.

The BSB number and Biller Code is hard coded on the Levy Notice Deposit Slip and can be typed into the Cover Letter following the below steps.

1. Search or select **Certificates**.
2. Click Report Setting tab.
3. Click Edit Cover Letter.
4. Select Global or Local as required. Global will report across your portfolio.
5. Enter text for Cover Letter including the BSB/Biller Code and StrataPay Reference special text <StrataPayRef> - example below:

```
BSB: 067-970
or
Biller Code: 74625

Account Number: <StrataPayRef>
```

6. Click File > Save.
7. Produce a sample Certificate for a Lot A/c to ensure the Cover Letter has been set as required.

Note: The property Bank Account Number should not be supplied for payments as the transaction will require manual allocation in the Bank Rec.

Owners Corporation Register

Section 147 of the Owners Corporation Act requires specific information to be available if requested. As the information is made up from various areas it is recommended to use a Report Set to combine the

required reports so the Report Set can be printed/saved at any point in time. The below reports are recommended:

- Plan Report
- Roll List (1)
- Document Amendment Report
- Disputes Register Report
- Contracts Register
- Insurance Report (if the details on the Plan Report are not sufficient)