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How To Issue a Status Certificate (Section Report) in Strata Master

The Status Certificate is a report with required information regarding a Lot, which is commonly requested and provided to prospective purchasers or to property conveyancers who are transacting the sale or purchase of a property on behalf of the seller or purchaser.

Note : The report in Strata Master is provided as a Word document, so that the details can be checked against the Lot card and ledger before issuance. User entry methods due to lack of training or due to compliance with obscure requests by Owners Corporations will result in some records not merging through to the report. Strata Master allows some flexibility in entry methods to enable clients to fulfil daily requirements in management of the Strata Plans.

To Process a Certificate

1. Click on the Form Rpts (Formatted Reports) icon in you Icon Toolbar.



2. Select Status Certificate from the tab 'All', or from the Owner Rpts tab.

Formatted Reports			
🚥 🌭 🔯 💶 💽 🖉 💷 🖬			2
All Trust Ledger General Ledger	Banking Rpts Strata	Mgt Rpts Owner Rpts Client F	lpts Financial Grp
Name	Group	Description	^
🕞 Outstanding Invoices	General Ledger	Report	
🛅 Outstanding Owner Invoices	Strata Mgt Rpts	Report	
🛅 Owner Ledger	Owner Rpts	Report	
🛅 Owner List	Owner Rpts	Report	
lo Portal Activity Report	Strata Mgt Rpts	Report	
🛅 Questionable Transactions	General Ledger	Report	
D Receipts	Banking Rpts	Report	
🛅 Statement of Financial Performance	Client Rpts	Report	
ò Statement of Financial Performance - Group	Financial Grp	Report	
losition Statement of Financial Position	Client Rpts	Report	
ò Statement of Financial Position - Group	Financial Grp	Report	
Statement of Key Financial Information	Client Rpts	Report	
🔁 Status Certificate	Owner Rpts	Word Processor Report	
ồ Strata Bank Balances	Banking Rpts	Report	
🛅 Strata Bank Details	Banking Rpts	Report	
🛅 Strata Committees	Strata Mgt Rpts	Report	

- 3. The screen opens as pictured below. You will need to enter the relevant details.
 - The person making the request could be the conveyancer or an individual. Type their name in or cut and paste from another document.
 - Address is that of the person typed above.
 - Generally one Status certificate is requested, however note that you can select all Lots in a Plan.

😋, Report Parame	ters	×
Person or Organisati	on Requesting the Certificate	0
		-
Owner selection C All owners in a	strata plan 🕫 One owner	
Select Lot/Owner		_
C Unit/Plan 📀	Lot/Plan C Address C Name C Lot Ref	
Lot No. Pla	n No.	
🔲 Update Certific	ate Issued Date	
Exclude lot from	n debt recovery	
Warning	This is an important legal document, the accuracy and completeness of which is the sole responsibility of the individual and the business preparing and executing the document.	
	Rockend assumes no responsibility for the accuracy of this document.	
	OK Exit	

4. Once entered the request appears as below.

🖪, Report Param	eters	×
Person or Organisa	ation Requesting the Certificate	?
Jones Solicitors		
Address of Person 111 Jones Streets,	or Organisation Requesting the Certficate , Jonesville, VIC 3000	_
Owner selection C All owners in	a strata plan 💿 One owner	
Selected: Lot 4 / O Unit/Plan @ Lot No. Pl	/ Plan 6666 (GST registered) · Lot/Plan C Address C Name C Lot Ref A/The Champions, 45 Sportsman Road, COBUR WA 6000	G
✓ Update Certifi ✓ Exclude lot from	icate Issued Date om debt recovery	
Warning	This is an important legal document, the accuracy and completeness of which is the sole responsibility of the individual and the business preparing and executing the document.	
	Rockend assumes no responsibility for the accuracy of this document.	

5. Click ok to generate<u>the draft</u> of the Certificate. Note you will need to peruse the draft and make manual edits where required.



6. The Word document will either open on your screen or be found in the bottom task bar, coloured yellow and flashing with the Word logo. Click on this logo to open the Certificate.



7. Once the draft is opened, peruse carefully to ensure that -

• all merge fields have merged,

- there are no paragraphs to remove (remember this document is set up to be used for all Lots and Plans),
- that the levies and other figures are correct. Varying processing practices in your office can affect whether levies are recognised for merging.

	OF THE STR	ATA TITLES ACT 1985	
Property:	Lot 4 in Strata Plan 6666,		
Proprietor:	The Champions, 4/45 Sport	sman Road, COBURG WA 6000	
Requesting party: Jones Solicitors			
Your Reference	9:		
The Owners of above that at 17	Strata Plan 6666 (the Strata Con ′ March 2023:	npany) hereby certifies in respect of the Property details	ed
1. Administra	ative Fund		
1. Administra The due da	ative Fund ates and amounts of any regular	periodic contributions determined by the Strata Compa	ny
 Administra The due da under section 	ative Fund ates and amounts of any regular ion 36(1) are: 01 Jan 2022	periodic contributions determined by the Strata Compa	ny
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8. An example of a section requiring removal is pictured here. Point 8 is an OR item and the second part is not applicable.

8.	Utility Charges The lot is not sub- [OR]	metered.
	The lot is sub-met	tered and the amount due but unpaid for gas, electricity and water consumption is:
	Gas:	[\$amount / nil] and paid to [date]
	Electricity:	[\$amount / nil] and paid to [date]
	Water:	[\$amount / nil] and paid to [date]

9. Save the document when is it considered correct and complete. Saving is done as for any other Word document, using the Save button or File > Save as.

AutoSave 💽 Off	<u>□</u> り~ひ ~		Document2 - Strata Maste	r Status Certificate - Microsoft Word
File Home	Insert Draw Design	Layout	References Mailings	Review View Help
Paste	$\begin{array}{c c} & & & \\ \hline \\ \hline$	~ A ₀	E - E - E - E = = = = = ±= - ▲ - E - 2↓ ¶	AaBbCcDc AaBbCc AaBbCcDd
Clipboard 🔽	Font	ы	Paragraph	دا Styles

List of Status Reports Requested

In Quick Reports, there is a record of Status Reports Requested. As below, select the Lots tab and Show Status Certificate History as the output. You can further filter by Plan, and/or date range, and/or certificates issued or updated.

Curick Reports Corporations Lots Registers Insurance Unners Corporation Details Manager "Select All Image: Select All Street No Street Postcode Town Postcode Managed? G Managed plans	Contacts Contacts
	Show status certaincare riskony
Lot # Unit # L 16 6666 4 4 Spo	or Address Name of ne status Letitu attsman Jones Solicit 17/03/2023

24/03/2023 6:48 pm AEDT