

Answering service setup worksheet

Template version 2026-09-26. Fill in one worksheet per community before your answering service goes live, and again whenever you change services. Anything in [SQUARE BRACKETS] is yours to fill in. Hand the finished worksheet to your provider and keep a copy.

1. The community

Community name [NAME], address [ADDRESS], [NUMBER] units, time zone [ZONE]. Main phone number [NUMBER]; separate leasing or maintenance numbers, if any, [NUMBERS]. Access codes the service may give callers: [NONE / WHICH ONES], only after checking [NAME, UNIT AND CALLBACK AGAINST THE RESIDENT LIST / OTHER CHECK]; a caller who cannot be verified gets [THE ON-CALL TECHNICIAN / A MESSAGE FOR THE OFFICE].

2. When the service answers

The office is open [DAYS, HOURS]. The service answers [AFTER HOURS ONLY / AFTER HOURS AND WHEN THE OFFICE DOES NOT PICK UP / AROUND THE CLOCK]. Holidays and closures this year: [DATES]. Who updates office hours with the service when they change: [ROLE].

3. What counts as an emergency

Attach your after-hours maintenance policy, or list the emergencies here: [LIST]. Decisions the service will ask about: lockouts [EMERGENCY / NOT], no heat below [TEMPERATURE, MEASURED INDOORS], no cooling above [TEMPERATURE, MEASURED INDOORS], a failed toilet in a one-bathroom unit [EMERGENCY / NOT]; check the thresholds with your counsel against the habitability rules where you operate. A caller in danger is told to call 911 first, and one who smells gas to leave the building and call [GAS UTILITY] from outside.

4. Who is called about an emergency

Attach your on-call schedule, or give the call order below. Say how many attempts each person gets before the next is called, [NUMBER], and what happens if nobody answers: [WHAT HAPPENS]. Who sends schedule changes and swaps to the service: [ROLE], by [HOW].

Order	Role	Name	Phone
1	On-call technician	[FROM THE SCHEDULE]	[FROM THE SCHEDULE]
2	Backup technician	[FROM THE SCHEDULE]	[FROM THE SCHEDULE]
3	[MAINTENANCE SUPERVISOR]	[NAME]	[PHONE]
4	[PROPERTY MANAGER]	[NAME]	[PHONE]

5. Everything that is not an emergency

Non-emergency maintenance goes to [THE OFFICE QUEUE / A WORK ORDER IN (PMS NAME)]. Leasing and prospect calls go to [A TRANSFER TO (NUMBER) / A MESSAGE FOR THE LEASING TEAM]. Noise and courtesy calls go to [COURTESY PATROL (NUMBER) / A MESSAGE FOR THE OFFICE]. Package, rent and general questions go to [A MESSAGE FOR THE OFFICE]. Anything else: [RULE].

6. Vendors and utilities

Gas utility [NUMBER]; electric [NUMBER]; water [NUMBER]; plumber, HVAC, water restoration, locksmith and elevator [NAME, NUMBER EACH]. Reporting an outage or gas smell to a utility is done by [THE SERVICE / THE TECHNICIAN]. Paid vendor calls are made by [ONLY THE TECHNICIAN / THE SERVICE, FOR (WHICH PROBLEMS), UP TO (LIMIT)], with [ROLE] approving anything above it. [ROLE] keeps these numbers current and sends changes by [HOW].

7. How calls are answered

Greeting: "[COMMUNITY NAME], [WORDING]." Languages: [ENGLISH / ENGLISH AND SPANISH]. Every caller is asked for their name, unit and callback number. Things the service must never say or promise: [LIST, SUCH AS ARRIVAL TIMES OR FEES].

8. Messages, records and reports

Call reports go to [NAMES AND EMAIL ADDRESSES] by [EMAIL / TEXT / THE PROVIDER'S APP], [AS EACH CALL COMES IN / AS A DAILY SUMMARY]. Recordings and transcripts: [WANTED / NOT NEEDED]. Work orders are created in [PMS NAME] by [THE OFFICE / THE SERVICE, WHERE ITS INTEGRATION SUPPORTS IT].

9. Test before go-live

Before the switch, call the service through [ITS TEST NUMBER / TEMPORARY FORWARDING] down every route you set up: an emergency, the same emergency with the primary not answering, a repair that can wait, a leasing call, an office message and each transfer. Check who was reached, what happens when nobody on the list answers, and that each report or work order arrived. [ROLE] switches [COMMUNITY PHONE NUMBER] over on [DATE]; repeat the emergency call through it that day. Tested by [NAME].

For the office team

From [DATE], calls to [COMMUNITY PHONE NUMBER] are answered by [SERVICE NAME] [WHEN]. Emergencies go to the on-call technician in the order on our schedule, and [LEASING OR COURTESY CALLS] are transferred right away. Everything else arrives as [A CALL REPORT / A WORK ORDER] by [HOW], for follow-up by [TIME]. Tell [ROLE] about any change to office hours, the on-call schedule or a vendor number the same day, because the service only knows what we tell it.