Board Docket

Board Docket — Counsel Manual

This book is for **association counsel**. You are not a member, not a director, and not a vote.

The Board Administrator invites you. You then appear only on **closed-session** items they list you on. Standing counsel is not a blanket grant: a later personnel session does not open because you were listed on an earlier lawsuit item.

> Screenshots in this book are from a sample association. Your live account shows your association's name and items.

Related: Directors Manual · Management Manual · Members Manual

---

1. What this is

Board Docket is Florida HOA board correspondence software. It keeps one association-owned record per matter so directors may communicate electronically, prepare a consent agenda, and record Adopted or Not adopted only after a noticed meeting. It is not an electronic vote, not legal advice, and not HOA management software.

A **closed session** is a noticed-meeting agenda section (personnel, or meeting with association attorney). It is not a chat room, not a private attorney mailbox, and not an electronic vote.

Mailbox: counsel may use **Mail** for association email (same three-pane desktop client as engaged management, directors, and committee members). Folders are Inbox, Sent, Drafts, Archive, Junk, and Trash. Drag a thread onto Inbox, Archive, Junk, or Trash. Delete and Junk hide it from you only. Restore to Inbox brings it back. A received message is not erased. Share with full board, Forward to lead, and Forward to board move your copy to Archive. Sign-in opens **Closed**. **Mail** is highlighted while you are in Mail. On the phone the bottom bar is **Mail** and **Closed**. You do not see Docket or Meetings. The top-right menu is Search, Manual, and Sign out. Opening a conversation uses the same form as Compose (From, To, Cc/Bcc, formatting, and attachments). To, Cc, and Bcc each include a box for any email address. Addresses you type receive the message by email. On To, **All**, each director, and the manager are names with a circle. **All** selects everyone on that line. Names with a circle stay in Board Docket. Adding an outside address on a reply makes that thread external. **Discuss privately** starts a separate internal thread. The subject stays on the thread. **Save draft** and **Send as** are for a new message. **Forward into Docket** is staff-only. A thread leaves Mail when it is placed on the Queue or filed onto an item; later comments stay there. Threads with counsel (or a counsel-marked contact) show a counsel flag. Committee electronic discussions may implicate FS 720.303(2); confirm open-meeting applicability for each association. You still cannot open ordinary Docket items,

record decisions, or export the association backup. Confirm privilege and records handling with your engagement letter and Florida Statutes. Not legal advice.

The **association** owns the writing. If the management company changes, closed-session records stay on the HOA. If the Board Administrator ends your counsel role, your sessions end; the writings remain.

The header is white. A **sage** line on the bottom of the bar means board-side access. You see a **Counsel** chip. Under the bar: **name · Counsel · Signed in {date time}**, frozen at login until Sign out.

Ask (header on wide screens, and **More**) answers product questions from these manuals and the FAQ. It cannot open closed-session packets or ordinary docket items. It is not legal advice and not a vote.

Home is **Closed sessions**, plus **Records review** when staff send a package to your email. There is no Docket queue, no Ready, no Reply as Director, no Meetings calendar, no Billing, and no backup ZIP.

---

2. Sign in

1. Open the Board Docket address in the welcome email.
2. Enter the email the Board Administrator invited.
3. Type the **6-digit code** on that same page, in the **same browser**. Codes expire and work once. There is no clickable login link.
4. If you serve more than one association, pick the correct one.

The code is sent to the email you were invited with. You do not create a mailbox for Board Docket.

This is not a member login.

---

3. Closed sessions (home)

Cards are upcoming or held meetings where you are on that segment’s roster. Each card links to the closed item and the **closed-session packet**.

You do not see ordinary docket items, member Updates, or closed sessions you were not listed on — even on the same HOA.

3a. Records review

Staff may **Request attorney review** on an official-records package and enter your email. The notice does not include the member’s request, document names, or commentary.

1. Sign in and open **Records review**.

2. Open each file. Exclude a document or commentary that should not be copied. Choose a basis and say why. The app does not decide privilege.
3. **Confirm and release.** That releases the package with those exclusions. Staff cannot hand the copies over before you confirm.

This is not a vote. You still cannot open the rest of the docket or run Official records for the association.



4. Open an item

On a listed closed item you see the title, description, files, and conversation. Members never do.

Reply as counsel. The post is stamped counsel on the server. It is an association writing, not a vote, and not a private attorney chat. Once posted, a message cannot be edited or withdrawn.

Compose notice: this closed-session writing may be withheld from member inspection when staff apply an exclusion with justification. Decisions happen only at the noticed meeting.

There is no **Approve** or **Reject**. After the meeting, the board record may say **Adopted** or **Not adopted**. You cannot record that decision.

Download the **closed-session packet** from the item or from Home. You cannot download the public meeting packet.

---

5. Rules of engagement

How a closed session is **performed** in this app:

1. The Board Administrator (or management, when they can assign the agenda) places a regular-track item on **Closed session** and states a basis: **Personnel** or **Meeting with association attorney**.
2. They name the roster for **that segment**. Seated directors and the Board Administrator are always in. Management attends only if checked (typically off for personnel, on for meeting with association attorney). You attend only if checked.
3. Talk stays on that docket item. There is no executive-session chat and no electronic vote.
4. The public packet stays consent + regular. The closed packet is for the roster only.
5. After the noticed meeting, the Board Administrator (or management, if they attended) records **Adopted** or **Not adopted**. Closed-session minutes are a separate PDF onto closed items only.
6. Privilege is **not** automatic. Closed placement hides the item from members in the app. A records-request ZIP still needs a human exclusion with justification. Confirm process with the association and the current Florida Statutes. This book is not legal advice.

---

6. Restrictions

Not available to counsel
Ordinary docket items, member Updates, or closed items you are not listed on
Docket queue, Ready for Consent Agenda, Request Board Discussion, Reply as Director
Meetings calendar, public meeting packet, public recap
Record Adopted / Not adopted
Seats, members, branding, billing, engagement, backup ZIP
Official records list, export, or handing copies to a member. You may review and confirm one package sent to your email

Not available to counsel
Vote, Approve, or Reject
Demote or replace the Board Administrator

Ending counsel (Board Administrator) kills your sessions immediately. Writings stay on the association.

---

7. Privacy in one line

Writings on a closed item are **association records**. Members do not see them on Updates. Staff may still have to produce or withhold them on a written official-records request. Confirm process with the association.

Need help?

Ask the Board Administrator who invited you.

Board Docket powered by StoufferAI