Board Docket

Board Docket — Members Manual

This book is for **association members** (homeowners and other members). On a live association you **do not sign in**. Your Board Administrator places a private **Owners portal** link on the association's secure website. That link shows released materials, shared items, closed records you may inspect, and a meeting calendar. You **never post**, create items, or vote.

The public **demo** still has an Owners tab with a signed-in look for product tours. Live HOAs use the portal link, not a personal Board Docket login.

You do **not** have board Mailbox unless the Board Administrator adds you to a **committee** (that path uses a personal sign-in for Mail only). Confirm open-meeting rules with association counsel.

Directors use the Directors Manual. Management and the Board Administrator use the Management Manual. Association counsel uses the Counsel Manual. They are not members.

> Screenshots in this book are from a sample association or the public demo.

---

1. What you will see

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.

It is not a public website and not an election.

The header is white. A **peach** line on the bottom of the bar means you are signed in as a member. Under the bar: **name · Member · Signed in {date time}**, frozen at login until Sign out.

Ask in the header answers product questions from these manuals and the FAQ. It cannot see this association's Updates. It is not legal advice and not a vote. **Search** finds the same items you would see on Updates.

Home is **Updates**. On the phone that label is the bottom bar. You do not see Docket or Meetings. Committee mail, when you have it, is the **Mail** tab. The top-right menu is Search, Records, Texts, Manual, and Sign out. Each card shows progress left to right: a check is a finished stage, a filled circle is the current stage, and an outline is still ahead (Prepare, Board review, Meeting, Closed). Names are in Symbol key. Status is the mark on the right. On the public demo, choose the **Owners** tab, then **Updates**, to see that track on each row (Start Date and Last Update appear before any due date). Dates are month and day. You do not see the staff **Who can see this** bar.

Section	Meaning
In progress	Open board work that is not yet on a meeting
On a meeting	On a noticed meeting (consent or regular)
Recently completed	Closed records you may inspect

This is not a vote. There is no Approve button. Official decisions happen at a noticed board meeting.



2. How you open materials

1. Sign in to your **association's** secure website (the one your HOA already uses).
2. Open the Board Docket **Owners portal** link your Board Administrator posted there.

3. Browse **Updates** and **Calendar**. No Board Docket email code or password is required for this portal.

If the link stops working, ask the Board Administrator — they may have rotated it for security.

Committee Mailbox (if you are on a committee) is separate and does use a Board Docket sign-in code.

---

3. Progress versus the full record

The board chooses who can see an item.

Board and management only (the usual setting while work is open):

- You **can** open the item and see the progress track and status.
- You **cannot** see the board conversation yet.
- Staff may release selected files for you under **Materials for review before the meeting**. That is not the full packet and not a vote.

When that item **closes** (completed, correspondence closed, or archived), you may **inspect** the conversation and every document. Cancelled board-and-management items stay hidden.

Members, board, and management (shared on purpose):

- You see the item and the conversation while it is still open.
- Files still depend on what staff released for members (plus every document after close for inspection).

Management only stays hidden from you even after close.

Drafts and director suggestions are never on Updates.

Closed session (personnel, or meeting with association attorney) never appears on Updates, including after it closes. You do not see the title, description, files, or conversation. You may see only that a noticed meeting has a closed segment if the association publishes a public agenda outside this app. Confirm process with association counsel. Privilege is not automatic; a written official-records request still goes to staff, who may withhold with justification.

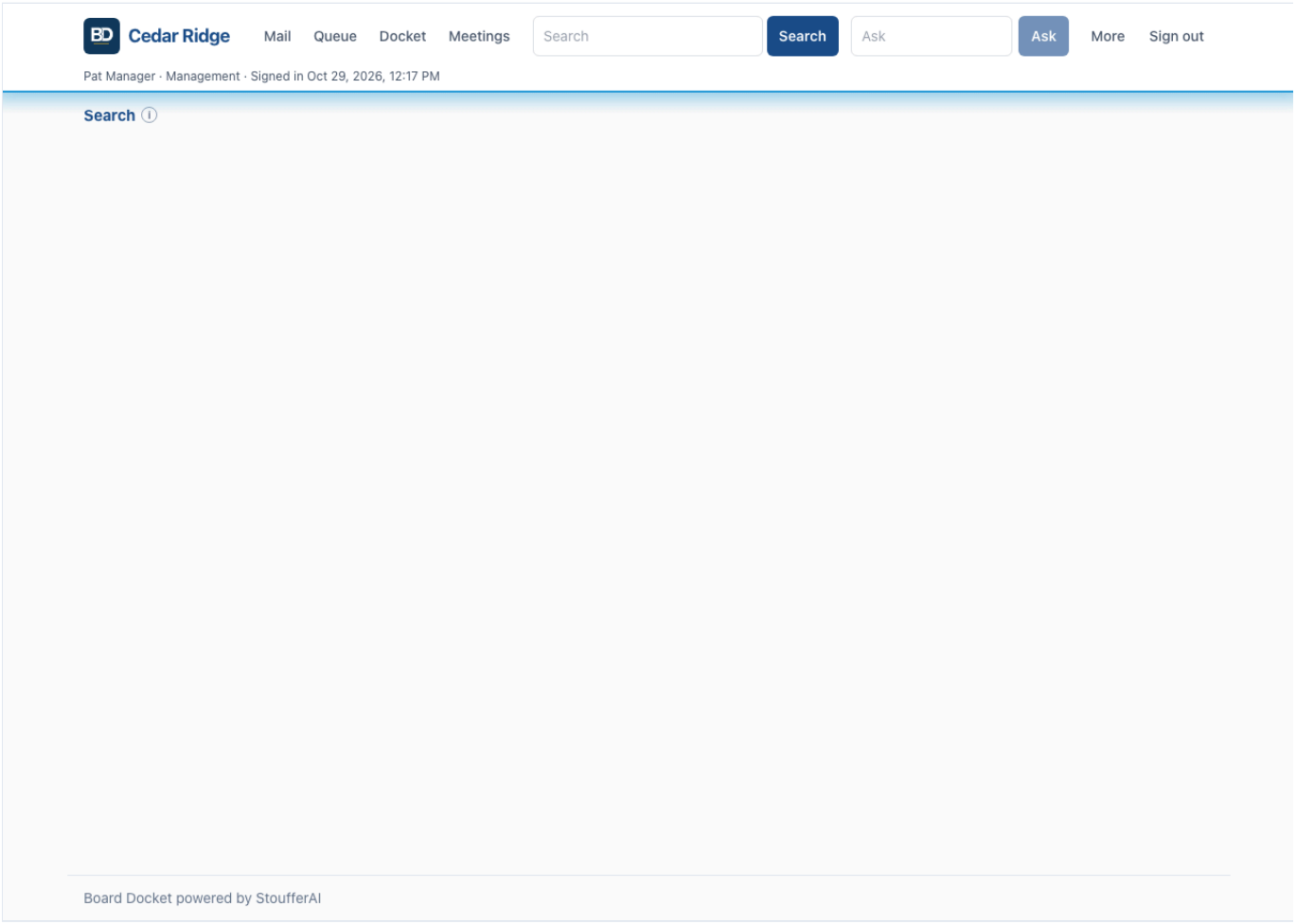
You cannot reply. There is no composer for members.

---

4. Search

The **Search** box is in the header on every screen. Type a word from the title or description and click **Search**.

Results are only items you can already open. Hidden drafts and management-only items will not appear.



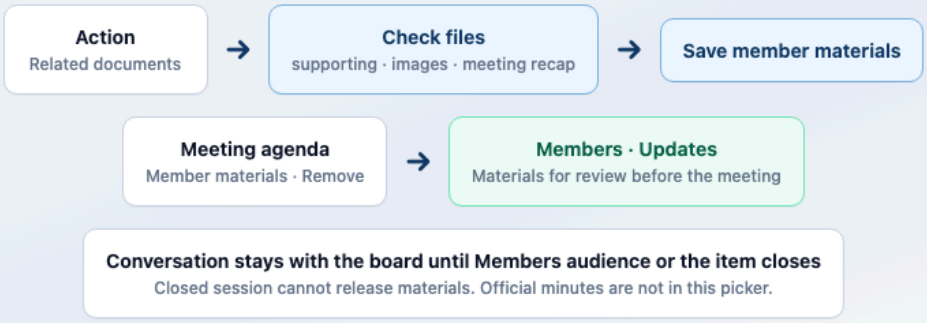
5. Open an item

From Updates or from search results, tap the title.

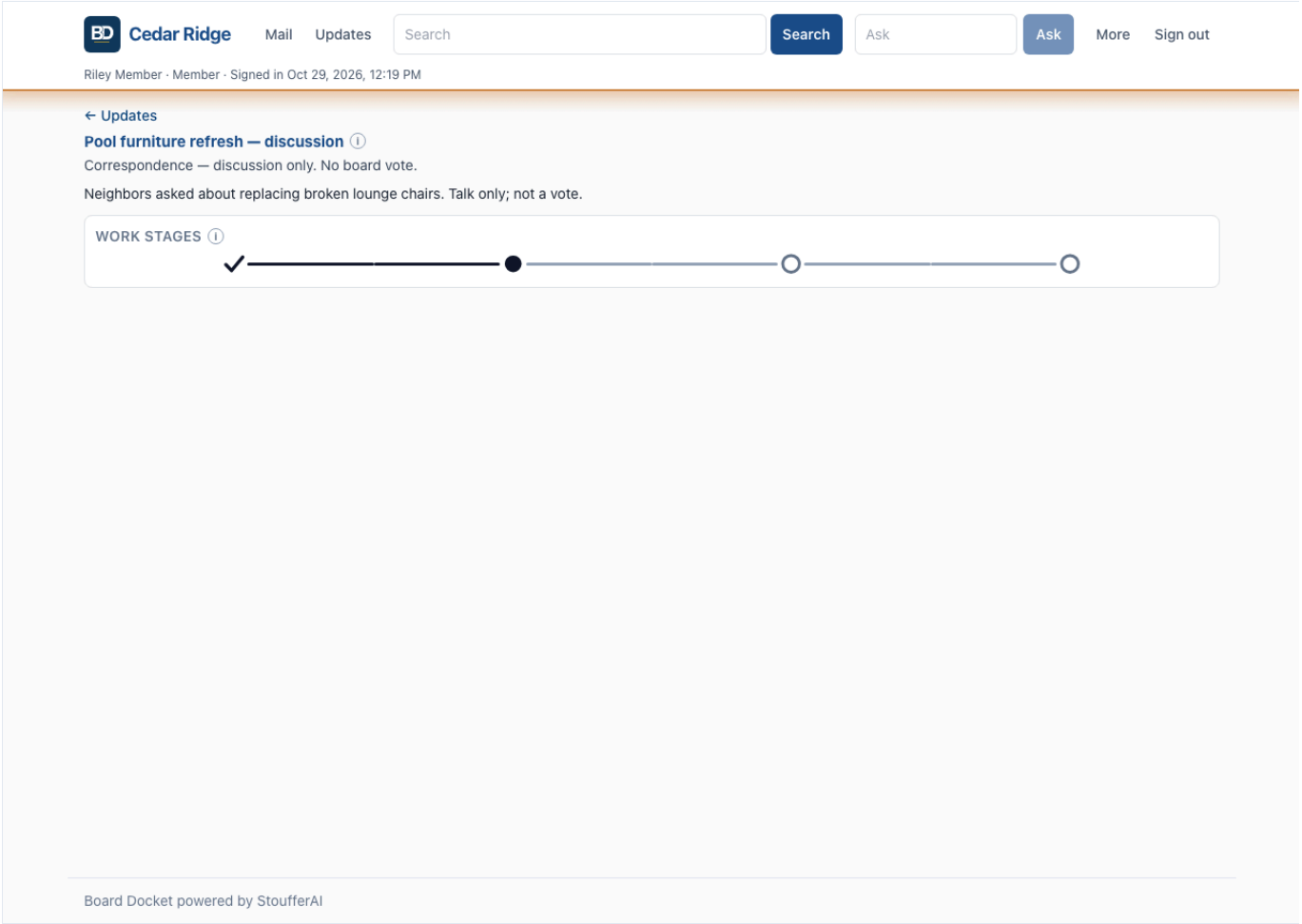
Progress-only item: stages, status, and a note that the conversation stays with the board until they share it or the item closes. If staff released files, you also see **Materials for review before the meeting** with **Open** and **Download**.

Member materials before a noticed meeting

Staff release selected files for members without opening the board conversation. This is not a vote.



After close, members may inspect every document on the record. Sharing Members opens conversation; files still follow the checkboxes until inspection.



Shared or closed inspectable item: Conversation and documents. Shared items show files staff released for members. After close you may inspect every document. Use **Open** and **Download**. You still cannot post. **Activity** under the thread is a collapsed work-file log, not conversation.

You may file a written official-records request under **More → Request official records**. Staff prepares ordinary copies. You can still send the same request the way your association already accepts it (often certified mail). Certified mail still matters for the statutory presumption.

← Updates

Vendor scheduling — irrigation start-up

Correspondence — discussion only. No board vote.

Discussion only. No board vote. Comment if you have access-gate concerns.

WORK STAGES



Conversation

DS DIRECTOR SMITH · SEP 5, 5:02 PM
South gate can be unlocked at 6:45 a.m. I will meet the crew. Members on Oak Court should know the system will cycle twice that morning.

PAT MANAGER · SEP 5, 9:02 PM
Thank you. Crew has the gate plan. Heads near 12 Oak will be flagged so they are not buried.

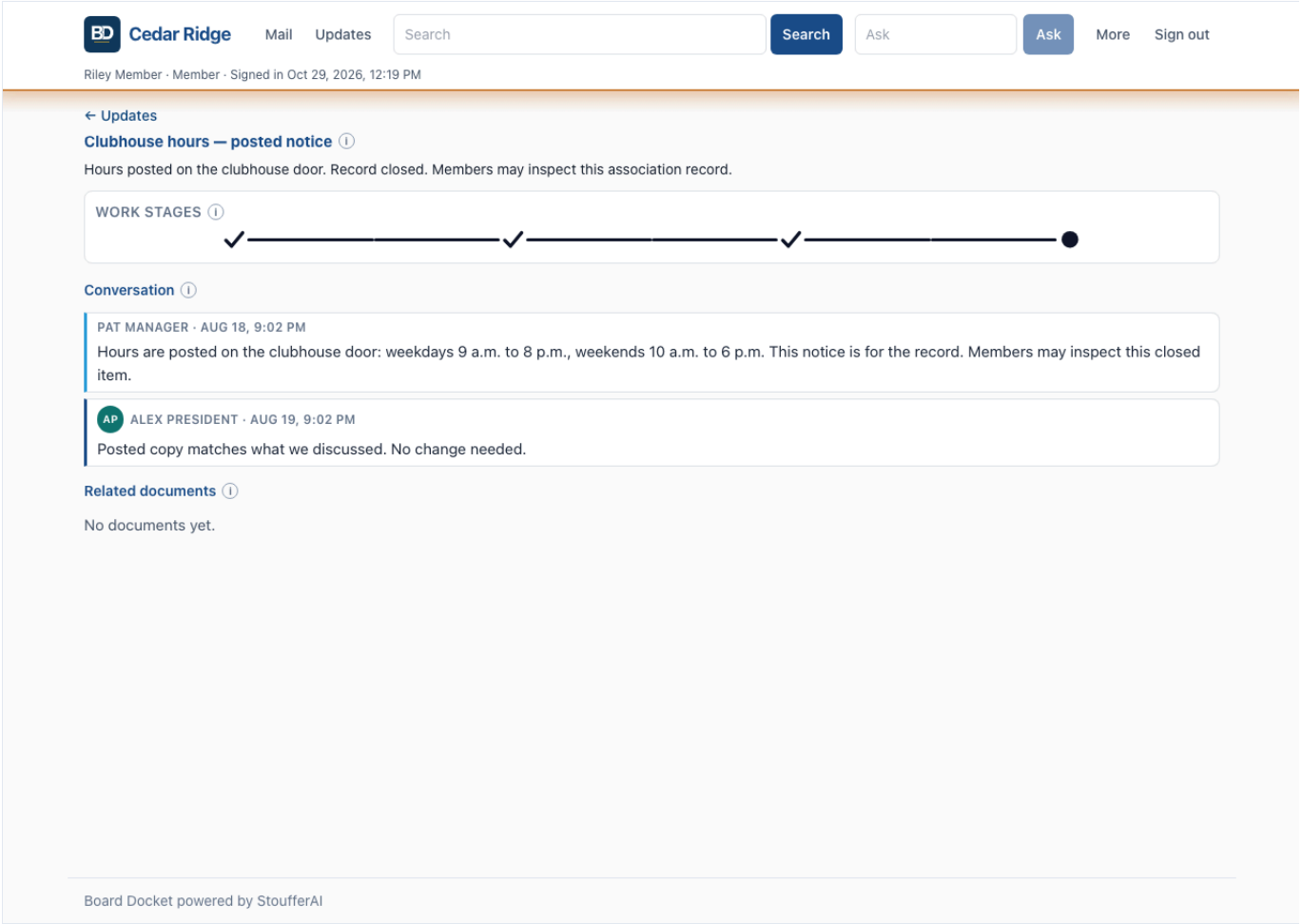
DJ DIRECTOR JONES · SEP 6, 1:02 AM
Please skip the bed at 8 Maple. New sod went in last week.

PAT MANAGER · SEP 6, 6:34 PM
Crew can start Tuesday if the south gate is unlocked by 7 a.m.

DS DIRECTOR SMITH · SEP 7, 10:52 AM
South gate can be unlocked Tuesday by 6:45. Please keep the hose bibs capped.

Related documents

No documents yet.



If an item is on a noticed meeting, you will see that it is on a meeting. You do not get the board's Meetings workspace.

---

6. What you cannot do

Not available to members
Post or reply
Create or suggest a docket item
See management-only items
See closed-session items (personnel, or meeting with association attorney), including after they close
See the closed-session packet, closed minutes, or closed conversation
See other people's Ready signals

Not available to members
Download the association backup ZIP
Vote, Approve, or Reject
Use board Mailbox (directors / management) without a committee assignment

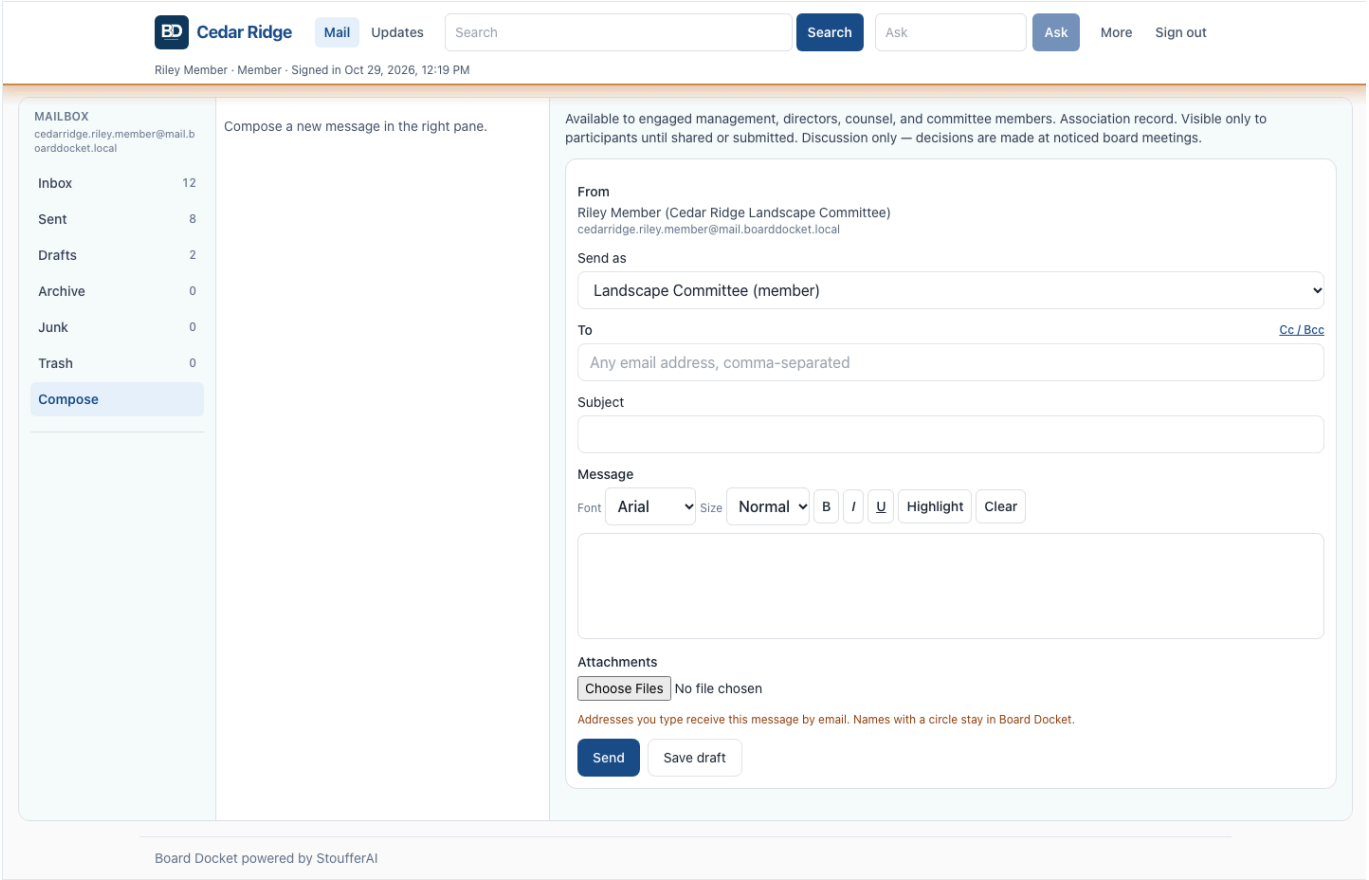
To ask the board something, use the path your association already uses (management email, meeting comment, or a written official-records request here or outside the app). Ordinary member access is inspection, progress, and records requests.

6A. Committee Mailbox (only if invited)

If the Board Administrator adds you to a **committee** under **More → Committees**, you also see **Mail**.

1. Open **Mail**. On desktop the folders are Inbox, Sent, Drafts, Archive, Junk, and Trash (same three-pane client as management and directors). Drag a thread onto Inbox, Archive, Junk, or Trash. Delete and Junk hide it from you only. Forward to lead moves your copy to Archive. The lead still sees it in Inbox.
2. **Send as** that committee when you start a new message. Outside email addresses can be added on To, Cc, and Bcc. The board mailbox lists **All**, each director, and the manager on To with a circle. **All** selects everyone on that line. A committee message does not list the whole board.
3. Opening a conversation uses that same form. To, Cc, and Bcc each include a box for any email address. Addresses you type receive the message by email. Names with a circle stay in Board Docket. Adding an outside address on a reply makes that thread external. The subject stays on the thread. **Send reply** posts there. **Save draft** and **Send as** are for a new message.
4. Messages are **association records**. Visible only to participants until someone **Forwards to lead** or the lead **Forwards to board**.
5. When a lead or director places the thread on the Queue, it leaves Mail. Later comments stay on that item. Discussion only — not a vote. Committee recommendations are made at noticed committee meetings. Confirm FS 720.303(2) open-meeting rules with association counsel. Not legal advice.

You still cannot post on Docket items, create board Actions, or vote.



7. Privacy in one line

Writings on Board Docket are treated as **association records**. Members may inspect shared and closed **board** records as described above. Closed-session items never appear on Updates. Staff may still withhold them on a written official-records request. The public cannot.

Need help?

Ask your Board Administrator or management company. They maintain the Owners portal link under **Owners** in Board Docket.

Board Docket powered by StoufferAI