



Board Docket — Management Manual

This book is for **property management** staff and for the **Board Administrator** (whoever the board designates to run the association's account). It is how you open matters, talk on the record, send items to a noticed meeting, and keep the association's files. Board Administrator is not the same as President.

It is **not** a vote. Binding board decisions happen at a noticed meeting. In the app, post-meeting labels are **Adopted** and **Not adopted**.

Directors use the [Directors Manual](#). Members use the [Members Manual](#). Association counsel uses the [Counsel Manual](#).

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

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.

Board Docket sits beside your management software (Vantaca, AppFolio, and the rest). It does not sync work orders or assessments. One job: board business should not live in reply-all email.

Each matter is a **docket item**. You create it, attach files, **Distribute to the board**, and keep one conversation on that item.

The **association** owns every record and the Stripe subscription. If the firm changes, history and billing stay with the HOA. Ending an engagement immediately ends management access; it does not delete records.

The header is white. A **sky** line on the bottom of the bar means management. A **sage** line means board (including Board Administrator). Under the bar: **name · title · 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 Queue. It is not legal advice and not a vote. **Search** finds items you can already open.

Who	Home	What they can do
Management	Queue	Create live items, reply as management, meetings, packets, management-only items
Board Administrator	Queue	Same tools as management for most board work, plus director signals, seats, members, counsel, branding, engagement, billing, backup

2. Sign in

1. Open the Board Docket address.
2. Enter your work email.
3. Type the **6-digit code** in the **same browser**. Codes expire and work once. If a code expires, request another.
4. If you work on more than one association, pick the correct one.

 Board Docket

DemoPricingFAQStart trialSign in

Sign in

Enter your email. We send a 6-digit code. Type it here in this same browser — not a link.

Email

Email me a sign-in code

[Management: password and authenticator](#)

 Board Docket powered by StoufferAI

DemoPricingFAQManualsFirmsTermsPrivacySign in

Optional: **More → Password and authenticator** to add a password plus an authenticator app. Sign-in then asks for the password and a 6-digit app code. The emailed code still works. Directors stay on the email code.

Optional: **More → Texts** for SMS notices. Sign-in is never by text.

3. Queue

Sign-in opens **Mail**. **Queue** lists items **under consideration**, plus a **Drafts** link. A mail thread leaves **Mail** when it arrives here. **Advance to Docket** moves that same conversation onto the Docket and off the Queue. Live and closed items are on **Docket**, not in this list.

Each row on **Queue** and **Docket** shows **Start Date** and **Last Update** between the item and the due date. Start Date is when the item was created. Last Update is the last time that item changed. Dates are month and day, the same style as Due. On a phone those two columns stay hidden so the title still fits.

An open Official Records Inspection is called out above the list when one is waiting.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 10:46 AM

Queue

Threads leave Mail when they arrive here. Advancing an item moves that same conversation to the Docket.

Under consideration 1

Weekend amenity hours — related suggestion

Director Jones also raised weekend amenity access. May merge with clubhouse hours. This is not a vote.

Suggested by Director Jones · Oct 8, 5:02 PM

Open to Advance / merge

Advance anyway

Send to staff

Reason to set aside

Set aside

Official Records Inspection: Riley Member due 9/22/2026; Riley Member due 9/24/2026.

Drafts (3)

Board Docket powered by StoufferAI

Mail is the first tab. **Docket** is the live and closed list, with filters (status, category, amount, dates, text). **Meetings** is the calendar. There is no **New** tab. **Search** in the header finds items you can open.

4. Create, submit, distribute

A board matter starts in **Mail**, not from a New tab.

1. **Suggest for consideration** on one thread, or **Combine into one item** when several Mail threads are the same matter. Each director still sees only their own comments and your replies.
2. The thread leaves Mail. The item is on the Queue.
3. **Forward into Docket** is the staff path that creates a **draft** (Queue → Drafts) instead of a Queue conversation. Directors do not use that folder.

On a draft, correspondence is the usual type (talk only; may never go to a meeting). Set title, description, optional dollar amount, category, and contract / capital / emergency flags. If a **published governance rule** matches the amount, type and source citation fill in — that can **override** the Type you picked. Set **Who can see this** (see §6). **Save draft**.

Save draft does not put the item on a meeting. The board does not see it until you **Submit** and **Distribute**. Type is what you will ask of the board later, not a roster placement.

BD

Cedar Ridge

Mail

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Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM

New docket item ⓘ

Title

Description

Type

Consent agenda candidate

Dollar amount (optional) ⓘ

Category (optional)

e.g. operations, capital, maintenance

Review by (optional)

mm/dd/yyyy

Flags (optional)

☐ Contract

☐ Capital project

☐ Emergency

Who can see this ⓘ

Board and management only

Classification if no rule matches

Management Authority (Purchasing Policy §4.2)

Save draft

Board Docket powered by StoufferAI

On the draft:

1. **Upload** PDFs, Office files, or images. Files follow the item’s visibility. There is no per-file audience picker.
2. **Delete draft** — removes the unpublished item. Directors, management, and the Board Administrator can do this. It is not yet on the board record. After **Submit**, Delete draft is gone — use **Cancel** so the submitted item stays on the trail.
3. **Submit** — locks the draft for internal check.
4. **Distribute to the board** — sends to eligible directors and starts the clock.

You cannot distribute while the association is still **provisional** (waiting for the Board Administrator to take ownership), or after trial if the subscription is unpaid. Directors can still open existing items when unpaid.

After distribute you may still upload files until the item is completed, cancelled, or archived.

BD

Cedar Ridge

Mail

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Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM

Docket

► Filter

ACTION	DUE	\$
? Irrigation main break — emergency repair    		\$4,200 
? Front Entrance    		×
? Vendor scheduling — irrigation start-up    		
? Clubhouse hours — posted notice    		✓
? Roof replacement — \$15,000   		
? Landscape contract — \$6,200   		
● Palm Tree Replacements   		\$5,600 
● Insurance claim — meeting with association attorney    		
● Personnel matter for closed session    		
● Pool heater — waiting for minutes   		\$3,200 ✓
● Equipment purchase — \$4,850   		
● Irrigation timer — suggested from the committee   		×
● South entrance paint — suggested from Mailbox   		×
● Clubhouse after-hours use — under consideration    		
● Pool furniture refresh — discussion   		

• Symbol key

Board Docket powered by StoufferAI

5. Item types

Type does **not** schedule a meeting by itself. Only two types auto-place after **Distribute**.

Type	After Distribute	Auto on a meeting?	Typical use
Correspondence	Talk on the record. Close as correspondence when done.	No	Email replacement
Information only	Directors may click I've Reviewed This (optional).	No	FYI
Acknowledgment	Directors click I've Reviewed This.	No	Under management

Type	After Distribute	Auto on a meeting?	Typical use
			spending authority
Board input	Non-binding support / do not support, or Request Board Discussion.	No	Feedback before a meeting
Consent agenda candidate	Ready for Consent Agenda or Request Board Discussion. Ready is not a vote. Silence is never Ready.	Only after enough Ready signals → consent agenda	Purchases that need a meeting decision
Board meeting required	Needs a noticed meeting.	Yes — regular agenda	Capital / high dollar
Acted under emergency authority	Record of action already taken; ratification at a meeting.	Yes — regular agenda	Emergency

Consent agenda is the meeting list of routine items that already hit Ready. At the noticed meeting they may be **adopted in one motion** if they stay on consent. That motion is the decision. Clicking Ready in the app only means a director is prepared for that list.

6. Who can see this

Set this on the item. Labels in the product:

Label	While open	After close
Management only	Hidden from board and members	Still hidden from board and members
Board and management only (default)	Members see progress only (stages and status; no thread or files)	Members may inspect the conversation and every document. Cancelled stays hidden.
Members, board, and management	Members see the item, conversation, and files	Same

On an open item, staff can **click the chips** (Management / Board / Members) to change who can see this. The selected chip fills in. Work stages (Prepare / Board review / Meeting / Closed) are **indicators only** — they are not buttons.

Members never post. Drafts and suggestions stay hidden from members.

BD



[Cedar Ridge](#)

[MailQueueDocketMeetings](#)

Search

Search

Search

Ask about Board Docket

Ask

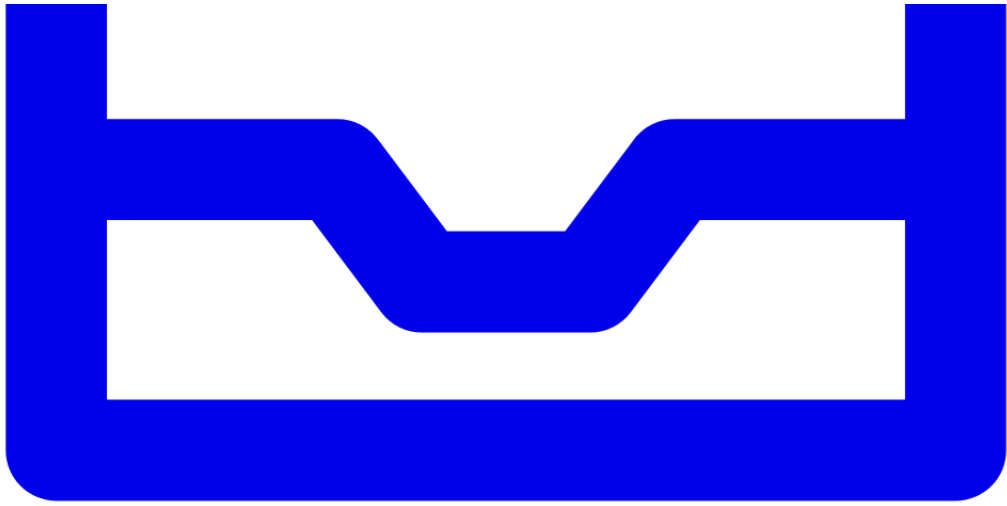
Ask

[More](#)

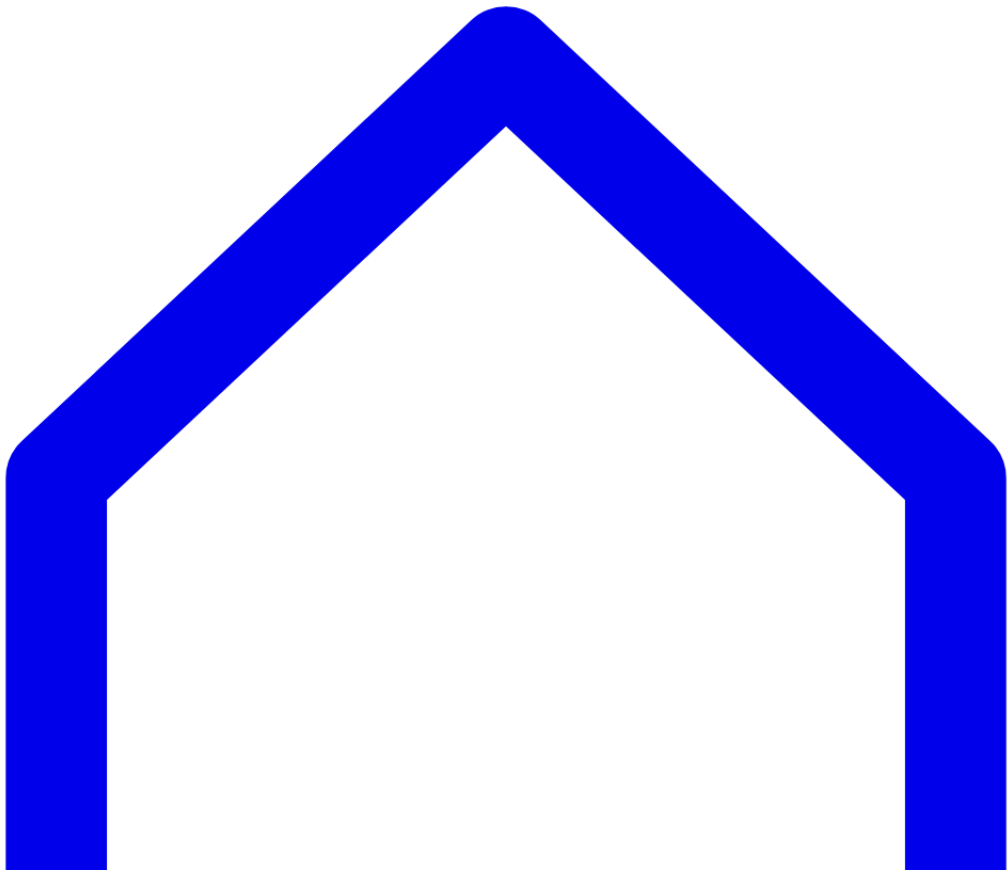
Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM



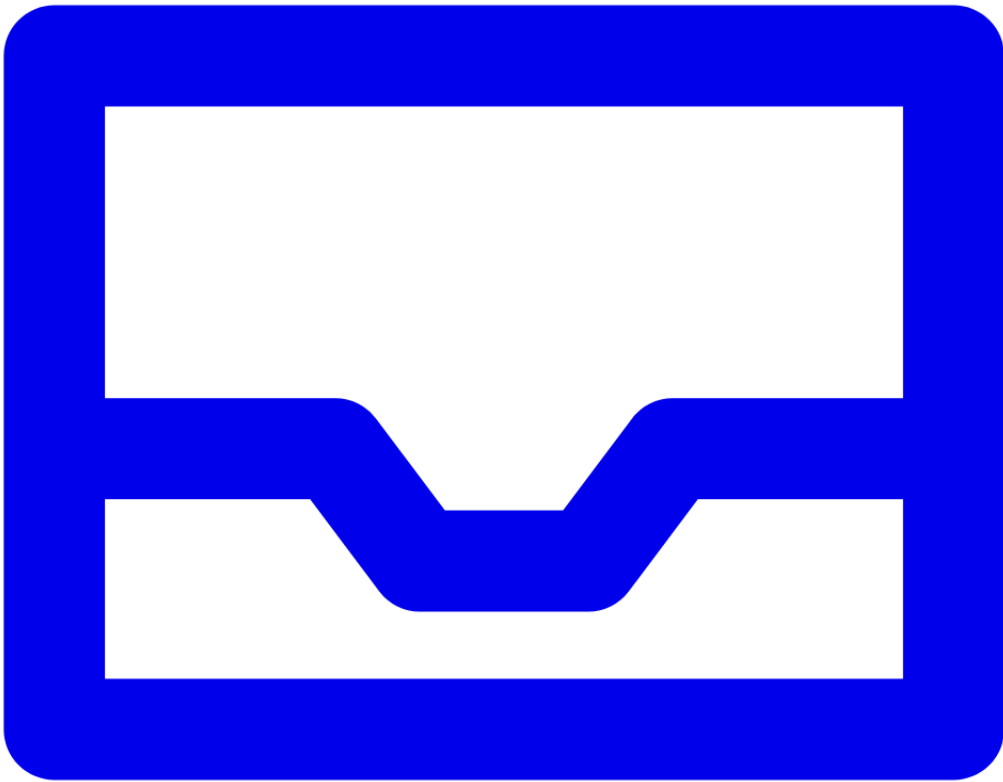


[Mail](#)



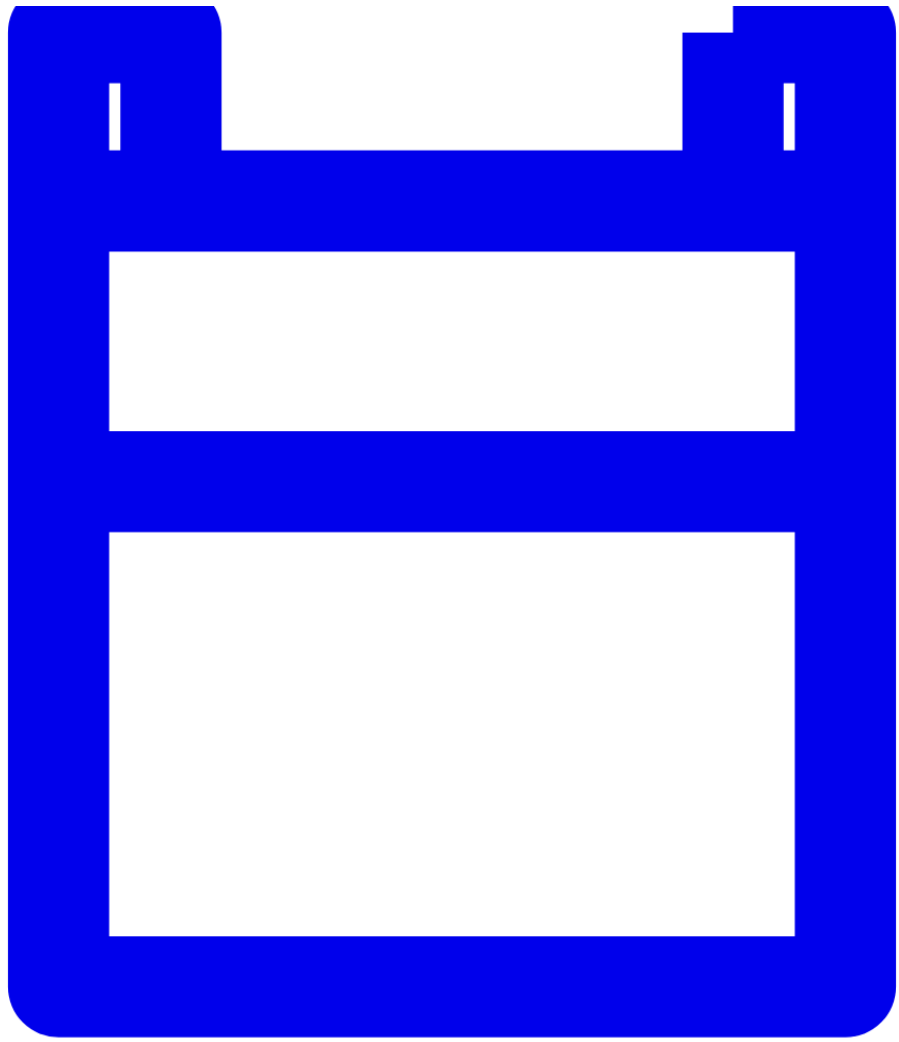


[Queue](#)



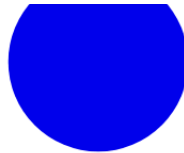
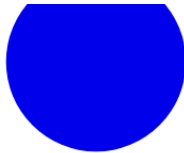
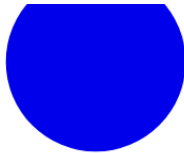
[Docket](#)





[Meetings](#)





[More](#)
[← Queue](#)

Equipment purchase — \$4,850



\$4850.00

Consent Agenda Candidate (Purchasing Policy §4.2)

Replace pool pump. Consent agenda candidate with 3 of 4 directors ready.

Work stages



1. Prepare
2. [Board review](#)
3. [Meeting](#)
4. Closed

Who can see this



1. [Management](#)
2. [Board](#)
3. [Members](#)

Meeting recap



[Request meeting recap](#)

Conversation



1. Pat Manager · Sep 3, 9:02 PM

Vendor quote is attached. Two pumps compared. Recommending the Hayward 1.5 HP at \$4,850 including install and haul-away of the old unit. Three-year parts and labor warranty.

2. [DS](#)Director Smith · Sep 4, 9:02 AM

Quote looks complete. Fine for consent if the three-year warranty is copied into the meeting packet. No other questions.

3. [DJ](#)Director Jones · Sep 4, 3:02 PM

Please confirm the old pump is hauled away the same day so we do not leave equipment by the pool fence.

4. Pat Manager · Sep 4, 9:02 PM

Confirmed. Haulaway is in the quote. I placed this on the April consent agenda. Packet will include the warranty page.

Submitted your reply to the question. Please click on the "Open Consent Agenda" button that appears on the meeting page.

5. **DB**Director Brown · Sep 5, 3:02 AM
Ready. No further questions from me.
6. **DS**Director Smith · Sep 5, 7:11 PM
Ready for the consent agenda
Quote looks complete. Fine for consent if the three-year warranty is in the packet.
7. **DI**Director Jones · Sep 5, 7:11 PM
Ready for the consent agenda
Please confirm haul-away the same day.
8. **DB**Director Brown · Sep 5, 7:11 PM
Ready for the consent agenda
Ready. No further questions.
9. Pat Manager · Sep 6, 4:09 PM
Vendor quote is attached for the pump replacement.

Activity (6)

Expand

Status beats for this item. Not conversation.

Reply as management

Font Arial Size Normal B I U Highlight Clear

Attach documents i

Choose Files No file chosen

On the [meeting agenda](#).

Add to a noticed meeting

i

Meeting Garage Door Replacement · 9/17/2026, 9:00:00 AM · consent closed Agenda section Consent agenda Add to meeting

READY FOR CONSENT AGENDA — 3 of 5 eligible directors ready. Director Davis, Director Liner has not responded.

► Record recusal

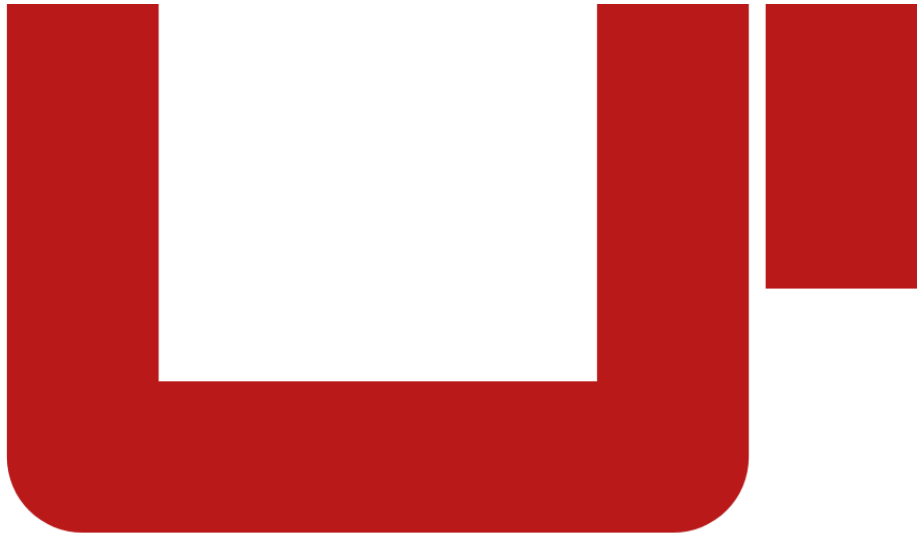
Related documents

i

No documents yet.

Choose File No file chosen Upload





Official Records Inspection

i

Minimize

Output ZIP — ordinary filesDownload

Mark handed to requester

The ZIP is copies: README.txt, INDEX.txt, conversation.txt, and files/. The requester does not need Board Docket.

Riley Member · Due 9/22/2026 · received

Please produce all writings on the pump purchase.

Request attorney review

Add the attorney’s email. They can exclude documents or commentary. The package is released when they confirm. This is not a vote.

Attorney email Send for attorney review

- Conversation — Pat Manager

Vendor quote is attached. Two pumps compared. Recommending the Hayward 1.5 HP at \$4,850 including install and haul-away of the old unit. Three-year parts and labor warranty.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Conversation — Director Smith

Quote looks complete. Fine for consent if the three-year warranty is copied into the meeting packet. No other questions.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Conversation — Director Jones

Please confirm the old pump is hauled away the same day so we do not leave equipment by the pool fence.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Conversation — Pat Manager

Confirmed. Haul-away is in the quote. I placed this on the April consent agenda. Packet will include the warranty page.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Conversation — Director Brown

Ready. No further questions from me.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Item: Equipment purchase — \$4,850

Replace pool pump. Consent agenda candidate with 3 of 4 directors ready.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Signal — Director Smith (ready for consent)

Quote looks complete. Fine for consent if the three-year warranty is in the packet.

Withhold basis Why this writing is withheld Required. The app does Exclude from the package
- Signal — Director Jones (ready for consent)

Please confirm haul-away the same day.

Withhold basis

Choose a basis

▼

Why this writing is withheld

Required. The app does

Exclude from the package

- Signal — Director Brown (ready for consent)
Ready. No further questions.

Withhold basis

Choose a basis

▼

Why this writing is withheld

Required. The app does

Exclude from the package
- Conversation — Pat Manager
Vendor quote is attached for the pump replacement.

Withhold basis

Choose a basis

▼

Why this writing is withheld

Required. The app does

Exclude from the package

Certified mail still matters for the statutory presumption. This log is the association's work file.

Who received it?

i

Director	Email Text	Viewed	Response
DB Director Brown	— — —		ready for consent
DD Director Davis	— — —		No response
DJ Director Jones	— — —		ready for consent
DL Director Liner	— — —		No response
DS Director Smith	— — 9/7/2026, 11:08:25 AM		ready for consent

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7. Conversation and files

Conversation is the open thread: posts, director signals (Ready / Asked for board discussion), and files added on the item. Directors show a colored identity mark and a timestamp on each turn.

Activity sits under the thread. It is the work-file log of status beats (placed on a meeting, changed who can see this). It starts **collapsed**. Expand to read it; Minimize to hide it. Those lines are not replies.

You **Reply as management**. Directors **Reply as Director**. Posts are association records and may be inspected by a member. **Once posted, a message cannot be edited or withdrawn**. Follow-up with a new post.

Attach files on a reply when they belong to that turn. Use **Open** and **Download** there.

← Queue

Landscape contract — \$6,200

\$6200.00

Consent Agenda Candidate (Purchasing Policy §4.2)

RFP circulated to three vendors. Two bids compared. Pulled to the regular agenda after Director Davis requested discussion.

WORK STAGES



WHO CAN SEE THIS



Meeting recap

Request meeting recap

Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM

- DJ

DIRECTOR JONES · AUG 23, 5:00 PM

Confirm all three walk the same beds including the Oak Court slope.
- PAT MANAGER · AUG 25, 5:00 PM

Walk completed. All three walked Oak Court. Harbor may no-bid. Waiting on numbers.
- PAT MANAGER · AUG 31, 5:00 PM

Two bids are in. Harbor declined. Greenfield is \$6,200 for the year. Oak & Pine came in at \$7,150 with a wider mulch spec. Both bids are attached.

0

Greenfield-bid.pdf · [Open](#) · [Download](#)

0

Oak-and-Pine-bid.pdf · [Open](#) · [Download](#)

DD

DIRECTOR DAVIS · SEP 1, 5:00 PM

I need the full bid package before consent. Why is Oak & Pine higher, and did both walk the same beds? Please pull this to discussion.

PAT MANAGER · SEP 2, 5:00 PM

Side-by-side is attached. Same walk date. Oak & Pine includes pine straw that Greenfield priced as an extra.

0

Bid-comparison.pdf · [Open](#) · [Download](#)

PAT MANAGER · SEP 4, 5:00 PM

I placed this on the regular agenda of the April noticed meeting. The packet is the RFP, both bids, and the comparison.

DS

DIRECTOR SMITH · SEP 4, 9:00 PM

Thank you. Regular agenda is the right place. I can support Greenfield if the mulch extra is written as a not-to-exceed.

DB

DIRECTOR BROWN · SEP 5, 5:00 PM

I will come prepared for the meeting. No further questions from me.

PAT MANAGER · SEP 17, 5:02 PM

The current landscape contract ends May 31. I am drafting an RFP for annual maintenance: mow, beds, mulch, and an irrigation check. Comment on scope before I send it out. This is not a vote.

DS

DIRECTOR SMITH · SEP 18, 12:41 PM

Filed from official mail to director.cedarridge@inbound.boarddocket.com.
From: office@oakandpine.example
Subject: Oak & Pine bid follow-up — Oak Court beds

We walked the same beds as Greenfield, including Oak Court slope. The \$7,150 figure is a wider mulch spec, not a different walk. Happy to answer questions on the landscape item.

AP

ALEX PRESIDENT · SEP 18, 5:02 PM

Include pine straw versus mulch as an alternate so bids are comparable. Send to at least three vendors.

PAT MANAGER · SEP 19, 5:02 PM

RFP is attached and sent to Greenfield, Oak & Pine, and Harbor Lawn. Walk March 12. Bids due March 19. This is not a vote.

0

Landscape-RFP.pdf · [Open](#) · [Download](#)

DD

DIRECTOR DAVIS · SEP 20, 5:02 PM

DB DIRECTOR BROWN · SEP 29, 3:02 PM

Who else was invited? Last year we only got one bid.

DD DIRECTOR DAVIS · OCT 1, 5:02 PM

Asked for board discussion
Need the full bid package

DS DIRECTOR SMITH · OCT 3, 5:02 AM

Ready for the consent agenda
Fine for consent if the mulch extra is written as a not-to-exceed.

DJ DIRECTOR JONES · OCT 3, 5:02 PM

Ready for the consent agenda
Ready once this is on a noticed meeting.

Activity (2)

Status beats for this item. Not conversation.

[Expand](#)

Reply as management

Font **Arial** Size **Normal** **B** *I* U Highlight Clear

Reply to the board

Attach documents ①

Choose Files No file chosen

On the [meeting agenda](#).

2 of 5 eligible directors ready. Silence is not counted as ready.

Record recusal

Related documents ①

0 Landscape-RFP.pdf · [Open](#) · [Download](#)

0 Greenfield-bid.pdf · [Open](#) · [Download](#)

0 Oak-and-Pine-bid.pdf · [Open](#) · [Download](#)

0 Bid-comparison.pdf · [Open](#) · [Download](#)

Choose File No file chosen

Upload

Director	Email	Text	Viewed	Response
DB Director Brown	—	—	9/22/2026, 3:07:24 PM	No response
DD Director Davis	—	—	9/8/2026, 4:45:20 PM	requested discussion
DJ Director Jones	—	—	—	ready for consent
DL Director Liner	—	—	—	No response
DS Director Smith	—	—	9/6/2026, 7:24:58 PM	ready for consent

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Recusal: on an open item, recuse a director seat when that person must not count toward Ready. Recused names appear next to **Record recusal**. **Remove** puts that seat back in the eligible count. Recusal is not a vote.

Consideration → Docket

Suggested items appear on Queue, Mine, and Docket **under consideration**. The board can comment and mark **In favor**. Majority in favor guides the next step; it is not a vote. Directors cannot Advance.

Set aside requires a reason. **Send to staff** parks a management-only draft.

Open to Advance / Merge

On the Queue list, **Open to Advance / Merge** opens that suggestion. It does not Advance or Merge by itself. On the item you can edit the title and description, then **Advance to Docket**, **Merge into this item**, **Send to staff**, or **Set aside**.

Merge is only on that open item, and only while the suggestions are still under consideration. You choose the related suggestions. Their posts keep the original authors. Their documents move onto

this item. The source suggestions are withdrawn.

Advance

On the Queue list, **Advance** moves that suggestion to the live Docket immediately. The same conversation leaves the Queue. Directors and the Board Administrator are notified. If fewer than a majority have marked **In favor**, that click is the acknowledgment. In favor is a guide, not a vote.

Advance does not Merge.

On the open item, the same step is **Advance to Docket**. Below majority, check **Acknowledge Advance below majority** before that button. **Set aside** ends consideration and needs a reason. **Send to staff** parks a management-only draft. It does not email an address.

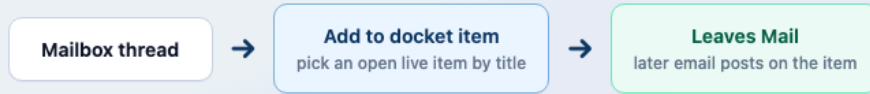
Update a live item

After **Advance to Docket**, a later mailbox thread is **Add to docket item** on that thread. Pick the open live item by title. The subject does not have to match. Messages are copied with their authors, and the thread freezes. It does not create a second suggested item.

Filing that mail, uploading a document, or posting as management or Board Administrator marks the item updated. Directors who already chose **I've Reviewed This, Ready for Consent Agenda, Supports**, or **Does not support** return to **Needs your attention**. Earlier responses stay. A request for discussion or more information stays in effect. A director reply does not reset the board. If Ready no longer meets the threshold, the item leaves the consent agenda and returns to awaiting response. Directors signal Ready again. This is not a vote. Silence is still not Ready. An item with a recorded decision is not reopened.

File a Mail thread onto a live item

The thread must still be in Mail. The subject does not have to match the docket title. This is not a second suggestion and not a vote.



Directors who already finished reviewing return to open

I've Reviewed This, Ready, Supports, and Does not support no longer cover the new material. Discussion and information requests stay.

If Ready no longer meets the threshold, the item leaves the consent agenda. Silence is still not Ready. A recorded decision is not reopened.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 11:30 AM

MAILBOX

cedarridge.pat.manager@mail.bo

arddocket.local

Inbox3

Drafts1

Compose

Contacts

Forward into Docket

INBOX

Select related threads. Each director still sees only their own comments.

Combine into one item

☐

Pool heater quotes — packaging for a draft

Internal · B1

☐

Warranty terms — Gulf Pool Heaters

External · B1

☐

April notice draft — board administrator

Internal · B1

Pool heater quotes — packaging for a draft

Internal thread · B1

Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

Add to docket item

Pool furniture refresh — discussion

Add to docket item

Director Smith · Internal · Thu Oct 08 2026 14:45:54 GMT-0400 (Eastern Daylight Time)

Pat — Jones and I prefer the longer warranty. Please package this as a Docket draft. Discussion only; not a vote.

Pat Manager · Internal · Thu Oct 08 2026 15:45:54 GMT-0400 (Eastern Daylight Time)

Received. I will open a draft with both quotes attached. This does not put it on a meeting.

From

Pat Manager (Cedar Ridge)

cedarridge.pat.manager@mail.boarddocket.local

To

Any email address, comma-separated

Cc / Bcc

All

Brown

Davis

Jones

Liner

Smith

Pat Manager

Subject

Pool heater quotes — packaging for a draft

Message

Font

Arial

Size

Normal

B

/

U

Highlight

Clear

Attachments

Choose Files

No file chosen

Addresses you type receive this message by email. Names with a circle stay in Board Docket.

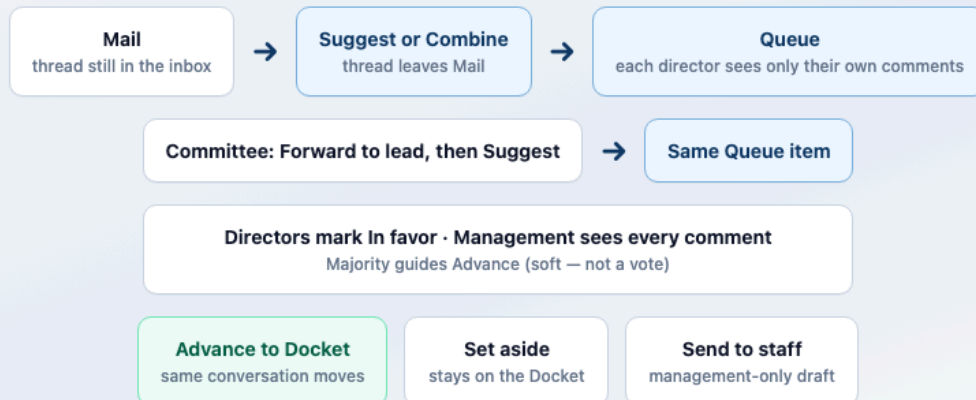
Send reply

Board Docket powered by StoufferAI

Error messages include a small close control. Closing one removes it.

How a matter reaches the live Docket

Discussion and In favor are not votes. Decisions are made at noticed meetings.



One conversation. It is not in Mail and on the item at the same time. Later email on a moved thread is posted on the item. Merge related Queue items before Advance. A thread still in Mail can be Add to docket item. Titles do not have to match.

Merge into this item

Management folds related suggestions into one keeper before Advance.

Suggestion A
keeper

Suggestion B

Suggestion C

↓ Merge into keeper

One suggested item

All messages keep original authors · All documents move · In favor unioned

↓ When ready

Advance / Set aside / Send to staff



Pat Manager · Management · Signed in Oct 9, 2026, 10:47 AM

[← Queue](#)**Weekend amenity hours — related suggestion**

Director Jones also raised weekend amenity access. May merge with clubhouse hours. This is not a vote.

WORK STAGES

Prepare

Board review

Meeting

Closed

WHO CAN SEE THIS

Management

Board

Members

Meeting recap [Request meeting recap](#)**Under consideration**

0 of 5 eligible directors in favor (majority needs 3). Silence is not in favor. This is not a vote.

Management decision

Advance moves this to the live Docket. Majority in favor guides that step; below majority you may still Advance with acknowledgment — there are no official electronic votes. Set aside ends consideration. Send to staff parks a management-only draft.

Title

Weekend amenity hours — related suggestion

Description

Director Jones also raised weekend amenity access. May merge with clubhouse hours. This is not a vote.

[Save title / description](#)☐ Acknowledge Advance below majority (not a vote)[Advance to Docket](#)[Send to staff](#)[Reason to set aside](#)[Set aside](#)**Conversation**

The conversation starts when management sends this to the board.

[Reply as management](#)

Font

Arial

Size

Normal

B

I

U

Highlight

Clear

Reply to the board

Attach documents [Choose Files](#) No file chosen**Related documents**

No documents yet.

[Choose File](#) No file chosen[Upload](#) **Official Records Inspection** [Expand](#)

Output

ZIP — ordinary files

[Download](#)

Download is available after you log the written request. ZIP opens on any computer.

[Log a written request](#) to gather this item's writings.

8. Official Records Inspection

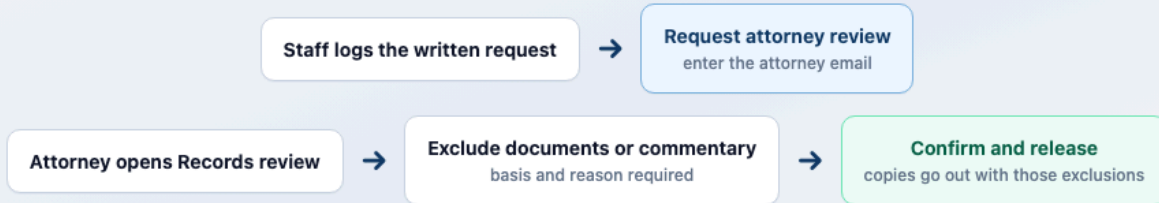
Members may ask in **writing here** (More → Official records) or outside this app. Staff fulfills from **Official records** or from one docket item at a time. A member request may have **zero or more** attached items.

The **Official Records Inspection** block sits near the bottom of the item (click the records mark to jump there). Expand / Minimize like Activity. Log the written request, then download a **ZIP of ordinary files** (README, INDEX, conversation.txt, files/). The requester does not need Board Docket to open them. This is not every official record of the association. This is not a vote.

Request attorney review takes an attorney email. The notice does not include the request, document names, or commentary. The attorney opens **Records review**, may exclude a document or commentary with a basis and a reason, and chooses **Confirm and release**. That releases the package. You cannot **Mark handed to requester** while the review is open. The app does not decide privilege.

Attorney review before release

The email does not include the request, document names, or commentary. The app does not decide privilege.



Staff cannot mark the package handed over while the review is open. This is not a vote.



← Official records

Jordan Hale ⓘ

received · due 10/23/2026

Please provide the records related to the palm tree replacements.

Output

ZIP — ordinary files

Download

Mark handed to requester

The ZIP is copies: README.txt, INDEX.txt, conversation.txt, and files/. The requester does not need Board Docket.

Request attorney review

Add the attorney's email. They can exclude documents or commentary. The package is released when they confirm. This is not a vote.

Attorney email

Send for attorney review

Attach the docket items that match this written request. Staff chooses the items. This is not a vote.

Docket item

Choose an item

Attach item

Palm Tree Replacements

Item: Palm Tree Replacements

Community requires 150 palm tree replacements throughout the community. Homes are identified but palm species are not defined. Estimate is \$5,600 for horticultural assessment.

Withhold basis

Choose a basis

Why this writing is withheld

Required. The app does not decide privilege.

Exclude from the package

Certified mail still matters for the statutory presumption. This log is the association's work file.


Official Records Inspection ⓘ
 [Minimize](#)

Output

ZIP — ordinary files
Download

Download is available after you log the written request. ZIP opens on any computer.

Log the written request you received. The 10-business-day clock starts from the date it arrived.

Requester name

Parcel

Contact

Date received

10/09/2026


Written request

Paste the letter or email.

Start the 10-day clock

Certified mail still matters for the statutory presumption. This log is the association's work file.

9. Meetings, packet, decision

1. Create or open a meeting under **Meetings**.
2. Add an open item from the item page or the meeting page.
3. **Regular agenda** = discussion at the noticed meeting. **Consent agenda** only if the item already reached the Ready threshold. **Closed session** = personnel or meeting with association attorney. Consent items cannot move to closed. List management (default off for personnel, on for lawyer-client) and check association counsel onto that segment. Standing counsel is not a blanket grant.
4. Reorder as needed (Board Administrator or management).
5. Download the **meeting packet (PDF)** for the board packet. It is consent + regular only. Download the **closed-session packet** only if you are on that roster.
6. On an open public item, near the top, **Request meeting recap** (management or Board Administrator). Do not put a public recap on a closed-session item. The draft uses only that item's conversation, documents, and files. Inspect the **Missing from this item** section, edit, then **Save as document**. It is a summary for the noticed meeting. It is not a vote. It is not minutes. Nothing is the record until you save it.

7. After the noticed meeting, record the decision. The screen says **Adopted** or **Not adopted** (and deferred / tabled when that is the outcome). Deferred, tabled, or referred items stay open for a later meeting. If management did not attend a closed session, only the Board Administrator records that decision. Counsel cannot record it.
8. **Deposit approved minutes** on the meeting (management only). This is a separate step from discussion files and from the recap. Minutes are usually approved at the next meeting. The PDF is placed on every **public** agenda item's thread. **Closed-session minutes** are a separate PDF onto closed items only. If management did not attend, the Board Administrator deposits them.
9. **Mark completed** only after a final decision (Adopted / Not adopted / No action) **and** every held meeting on that item has minutes on the thread. Closing is not a vote.

Closed session — rules of engagement

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

1. Use **Closed session** only for a noticed-meeting segment with a stated basis: **Personnel** or **Meeting with association attorney**. Closed items stay on the regular / meeting-required track. They are never consent.
2. Name the roster **per item**. Seated directors and the Board Administrator are always in. Check management only when they should attend (default off for personnel, on for lawyer-client). Check each counsel user who should see **that** segment. Standing counsel still must be listed.
3. Keep talk on the docket item. This is not an executive-session chat, not a private attorney mailbox, and not a vote.
4. Hand the board the **public packet** (consent + regular) and, to the roster only, the **closed-session packet**. Generating the public packet must not include closed Q&A or files.
5. Do not run **Request meeting recap** on a closed item. Recap is not minutes and must not pull closed text into a public summary.
6. After the noticed meeting, record **Adopted** or **Not adopted**. If you were omitted from that roster, only the Board Administrator records it. Counsel never records it.
7. Deposit **closed-session minutes** onto closed items only, same attendee gate. Public minutes stay on public items.
8. On a records request, closed items appear as withhold candidates with the basis pre-filled. Staff still type the justification. The app does not decide privilege. Board-admin ZIP export still includes closed records (the association owns them). Counsel cannot run export.
9. Ending a management engagement does not delete closed-session records. Ending counsel kills that lawyer's sessions; writings stay on the HOA.

Confirm process with association counsel. This book is not legal advice.

Closed session — restrictions

Restriction	What the product enforces
Members	Never see closed items on Updates, including after complete. They may see only that a noticed meeting has a closed segment if the association publishes a public agenda outside this app. Closed items cannot be shared as member-visible.
Management	See a closed item only if that session's roster includes management. Omitted staff cannot open the item or record the decision.
Counsel	Association counsel, not a member. Open only closed items they are listed on, plus a records package sent to their email for review. No ordinary docket, Billing, seats, branding, export, or the Official records list. Cannot demote the Board Administrator.
Consent	A consent-agenda item cannot move to closed.
Public packet / recap	Consent + regular only. No closed thread, files, or recap text.
Decision chrome	No Approve / Reject. Decision UI is still Adopted / Not adopted. Counsel cannot record it.
Privilege	Closed placement hides the item from members. A records ZIP still requires a human exclusion with justification.
Ownership	Firing management does not delete closed-session records.



Meetings ⓘ



March board meeting

Wednesday, Aug 12, 2026, 8:43 AM · held · Posted (48 hours) · consent closed



Garage Door Replacement

Thursday, Sep 17, 2026, 9:00 AM · upcoming · Posted (48 hours) · consent closed



April board meeting

Saturday, Sep 19, 2026, 7:11 PM · upcoming · Posted (48 hours) · consent closed



Sunday board meeting

Sunday, Oct 4, 2026, 3:00 PM · upcoming · Posted (48 hours) · consent closed

Schedule a noticed meeting

Title

Board meeting

Date

mm/dd/yyyy

Time

7 00 PM

Pick any day — Saturday and Sunday are allowed.

Notice type

Posted (48 hours)

Create meeting

[← Meetings](#)**April board meeting**

Saturday, Sep 19, 2026, 7:11 PM · upcoming

Notice: Posted (48 hours) · Consent deadline Thursday, Sep 17, 2026, 7:11 PM (consent closed)

[Download meeting packet \(PDF\)](#)[Download closed-session packet \(PDF\)](#)**Official minutes** ⓘ

Official minutes (PDF)

 No file chosen

Accepted at a later meeting (optional)

Not recorded ▼

Closed-session minutes ⓘ

Closed-session minutes (PDF)

 No file chosen

Accepted at a later held meeting (optional)

Not recorded ▼

Add an Action ⓘ

Action

Clubhouse after-hours use — under consideration · correspondence open ▼

Agenda section

Regular agenda ▼

Closed-session basis

Personnel ▼

☐ Management attends this closed session (typically off for personnel, on for meeting with association attorney)

List counsel on this closed session

☐ Ann Attorney☐ Morgan Counsel**Consent Agenda****[Equipment purchase — \\$4,850](#)**

Consent Agenda Candidate (Purchasing Policy §4.2) · on consent agenda

Record decision ⓘ

Adopted ▼

Vote tally (optional)

Resolution number (optional)

Regular Agenda

Landscape contract — \$6,200

Consent Agenda Candidate (Purchasing Policy §4.2) · meeting required

Move up

Move down

Record decision ⓘ

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Roof replacement — \$15,000

Board Meeting Required (Purchasing Policy §4.3) · meeting required

Move up

Move down

Record decision ⓘ

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Irrigation main break — emergency repair

Acted Under Emergency Authority (Purchasing Policy §4.4) · ratification pending

Move up

Move down

Record decision ⓘ

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Closed session

Insurance claim — meeting with association attorney

Closed session — Meeting with association attorney · meeting required

Move up

Move down

Record decision ⓘ

Adopted

Vote tally (optional)

Resolution number (optional)

Record formal decision

Close correspondence when the talk is done and the item was never a meeting decision.

Archive completed or cancelled items to clear them from active lists.

10. Mailbox (and Docket forward)

Mail is the first tab for engaged management, directors, counsel, and committee members. On desktop it is a three-pane email client (folders · thread list · reading/compose) on `mail.boarddocket.com`. It lists only threads that are not yet on an item. **Suggest for consideration** or **Combine into one item** places the conversation on the Queue and removes those threads from Mail. Combining does not paste directors' comments into one board-visible message: each director still sees only their own comments and your replies; you see all of them. Management is not added when a director shares with the full board, or when a committee lead forwards to the board. A suggested item is not a staff-only draft. Committee rooms are managed by the Board Administrator (**More → Committees**). Mailbox records access for custodian export is separate from member Official Records Inspection and needs a noticed-meeting approval entry by the Board Administrator. Confirm with association counsel; not legal advice.

Opening a conversation uses the **same form as Compose**: From, To, Cc/Bcc, formatting, and attachments. **Cc / Bcc** opens those fields. **Hide Cc / Bcc** closes them. To, Cc, and Bcc each include a box for any email address, comma-separated. 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. Counsel, the board administrator, and contacts are not listed. The subject stays the one already on the thread. **Send reply** posts on that conversation. **Save draft** and **Send as** are for a new message. Adding an outside address on a reply makes that thread external, and later messages on it go to those addresses. **Discuss privately** still starts a separate internal thread.

Add to docket item files a thread that is still in Mail onto one open live item you pick by title. The subject does not have to match. That thread then leaves Mail. Later email on it is posted on the item. Directors who had finished reviewing that item go back to open.

In Mailbox, open folder **Forward into Docket** for the association inbound address (`actions+...@inbound...`). **Engaged management and the Board Administrator only** — directors do not see this folder. That creates a staff **Docket draft** (subject → title, body → description), not a Mailbox thread. Allowed attachments are imported. This path skips consideration when the board already directed staff to file it.



MAILBOX

cedarridge.alex.president@mail.
boarddocket.local

Inbox 4

Drafts 1

Unassigned 0

Compose

Contacts

Records access

Forward into Docket

INBOX

Select related threads. Each director still sees only their own comments.

Combine into one item

☐ April notice draft — board administrator
Internal · B1

☐ Landscape committee — mulch
recommendation to board
Internal · C3

☐ Insurance renewal options (shared with board)
Internal · B2

☐ Draft budget worksheet (shared with board)
Internal · B2

Select a conversation

Choose a thread from the list, or open Compose to write a new message. A thread leaves Mail when it is placed on the Queue. Later comments stay on that item.



Director Smith · Director · Signed in Oct 9, 2026, 11:30 AM

MAILBOX

cedarridge.director.smith@mail.boarddocket.local

Inbox

9

Drafts

2

Compose

INBOX

Pool heater quotes — packaging for a draft

Internal · B1

Guest parking signs — wording

Internal · B1

Roof reserve study — questions for next packet

Internal · B1 · Counsel

Landscape committee — mulch recommendation to board

Internal · C3

Clubhouse Wi-Fi upgrade estimate

Internal · B1

Gate motor service window

External · B1

Pool heater quote — private review

Internal · B1

Insurance renewal options (shared with board)

Internal · B2

Draft budget worksheet (shared with board)

Internal · B2

Pool heater quote — private review

Internal thread · B1

Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

Share with full board

Suggest for consideration

Opens a suggested Docket item for the board and management to comment. It is not live until management Advances it. This is not a vote. This cannot be undone.

This elevation cannot be undone.

Director Smith · internal · Mon Oct 05 2026 12:50:36 GMT-0400 (Eastern Daylight Time)

Jones — two heater quotes attached in my notes. Discussion only; not a vote.

Director Jones · internal · Mon Oct 05 2026 14:50:36 GMT-0400 (Eastern Daylight Time)

Thanks. Prefer the unit with the longer warranty before we ask management to package it.

From

Director Smith (Cedar Ridge)

cedarridge.director.smith@mail.boarddocket.local

To

[Cc / Bcc](#)

Any email address, comma-separated

☐ All ☐ Brown ☐ Davis ☒ Jones ☐ Liner ☐ Smith ☐ Pat Manager

Subject

Pool heater quote — private review

Message

Font

Arial

Size

Normal

B

/

U

Highlight

Clear

Attachments

Choose Files

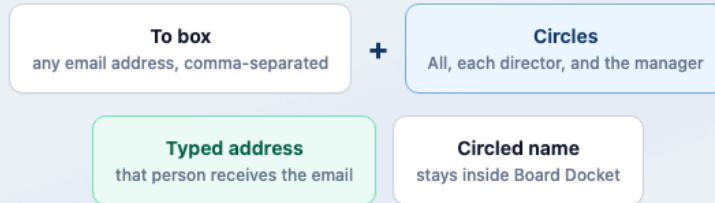
No file chosen

Addresses you type receive this message by email. Names with a circle stay in Board Docket.

Send reply

Same form for a new message and a reply

To, Cc, and Bcc each have a box for any email address. Names with a circle stay in Board Docket.



A reply that adds an outside address makes the thread external

Later messages on it go to those addresses. Discuss privately starts a separate internal thread. The subject stays on the conversation.

Save draft and Send as are for a new message. Send reply posts on the open conversation. This is not a vote.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

Alex President · Board Administrator · Signed in Oct 9, 2026, 11:30 AM

MAILBOX

cedarridge.alex.president@mail. boarddocket.local

Inbox

4

Drafts

1

Unassigned

0

Compose

Contacts

Records access

Forward into Docket

Docket ingest settings are in the right pane.

Forward into Docket

Separate from Mailbox email. Engaged management and the Board Administrator forward mail here to create a **Docket draft** (not a Mailbox thread and not a vote). Directors use Suggest or Mailbox → Suggest for consideration instead.

actions+093ba0429f12d1dd050a9042e0b64fc0@inbound.boarddocket.local

Copy address

- Allowed attachments are imported. The original email is stored when the provider includes it.
- A staff draft stays with management until someone distributes it in the app.
- This path skips the consideration / majority guide (board already directed staff to file it).
- Rotating the address stops the old one from working.

Rotate address

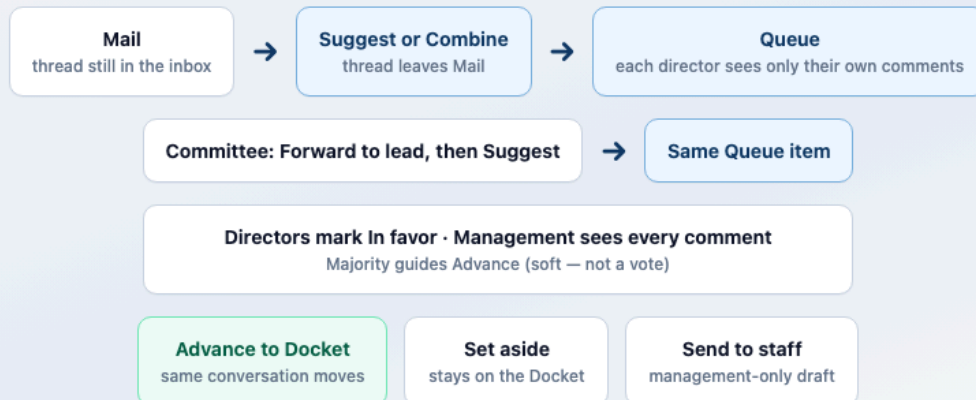
Board Docket powered by StoufferAI

Consideration → Docket

Suggested items stay on the Queue until you **Advance**, **Set aside**, or **Send to staff**. On the list, **Open to Advance / Merge** opens the suggestion so you can **Advance to Docket** or **Merge into this item**. **Advance** on the list moves that item to the Docket immediately, including when a majority is not **In favor**. That click is the acknowledgment. It is not a vote and it does not Merge. Set aside stays on the Docket so it does not return to Mail. Directors may mark **In favor**. On the Queue they do not see one another's comments. **Merge** keeps original authors and moves the documents; the source suggestions are withdrawn. Use **Combine into one item** in Mail when the sources are still separate threads. Rotate the inbound address if it leaks.

How a matter reaches the live Docket

Discussion and In favor are not votes. Decisions are made at noticed meetings.



One conversation. It is not in Mail and on the item at the same time. Later email on a moved thread is posted on the item. Merge related Queue items before Advance. A thread still in Mail can be Add to docket item. Titles do not have to match.

Merge into this item

Management folds related suggestions into one keeper before Advance.

Suggestion A
keeper

Suggestion B

Suggestion C

↓ Merge into keeper

One suggested item

All messages keep original authors · All documents move · In favor unioned

↓ When ready

Advance / Set aside / Send to staff

11. Search and reports

Header **Search** finds items by title or description.

More → Reports: days and dollars waiting from Ready-threshold to a recorded meeting decision, counts by status, and a **who saw what** projection from the audit log (views, responses, downloads).



Search ⓘ



Reports

Meeting recaps are requested on the Action, not here. Open the item and use **Request meeting recap**.

Waiting on a meeting decision ^①

\$0.00 waiting.

No items have reached the Ready threshold yet.

Actions by status

ratification pending — 1

draft — 5

correspondence open — 3

declined suggestion — 3

meeting required — 4

suggested — 1

completed — 1

awaiting response — 1

on consent agenda — 1

decision recorded — 1

Who saw what ^①

DS Director Smith · viewed · Equipment purchase — \$4,850 · Oct 9, 10:49 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 9, 10:48 AM

DS Director Smith · viewed · Landscape contract — \$6,200 · Oct 9, 10:47 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 10:47 AM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Oct 9, 10:24 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 9, 10:24 AM

DS Director Smith · viewed · Landscape contract — \$6,200 · Oct 9, 10:22 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 10:22 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:08 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:07 AM

DS Director Smith · viewed · South entrance paint — suggested from Mailbox · Oct 9, 10:07 AM

DS Director Smith · viewed · Weekend amenity hours — related suggestion · Oct 9, 9:59 AM

DS Director Smith · viewed · Landscape contract — \$6,200 · Oct 8, 8:27 PM

DS Director Smith · viewed · Landscape contract — \$6,200 · Oct 8, 7:47 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Oct 8, 7:47 PM

DS Director Smith · viewed · Landscape contract — \$6,200 · Oct 8, 7:44 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Oct 8, 7:44 PM

DS Director Smith · viewed · Fence staining question on Oak Court · Oct 8, 7:17 PM

DS Director Smith · viewed · Insurance claim — meeting with association attorney · Oct 8, 3:45 PM

DS Director Smith · viewed · Irrigation main break — emergency repair · Oct 8, 3:45 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 8, 2:53 PM

DS Director Smith · viewed · Front Entrance · Oct 8, 2:53 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 10:23 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:20 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:20 AM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 5, 9:19 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Oct 5, 9:19 AM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Oct 4, 8:22 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 4, 8:22 PM

PM Pat Manager · document opened · Test 8 · Oct 4, 8:19 PM

PM Pat Manager · document opened · Test 8 · Oct 4, 8:19 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Oct 4, 8:24 AM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 26, 3:10 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 26, 3:09 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 26, 3:08 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 22, 6:55 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 22, 6:54 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 22, 6:54 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 22, 1:23 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 22, 1:23 PM

AP Alex President · viewed · Vendor scheduling — irrigation start-up · Sep 17, 4:37 PM

AP Alex President · viewed · Florest Schedule · Sep 17, 4:36 PM

AP Alex President · viewed · Palm Tree Replacements · Sep 17, 4:25 PM

AP Alex President · viewed · Clubhouse hours — posted notice · Sep 17, 3:07 PM

AP Alex President · viewed · Clubhouse hours — posted notice · Sep 17, 3:07 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:38 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:38 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

AP Alex President · viewed · Personnel matter for closed session · Sep 17, 1:37 PM

GL Greg Liner · viewed · Test 8 · Sep 9, 5:14 PM

GL Greg Liner · viewed · Front Entrance · Sep 9, 2:44 PM

GL Greg Liner · viewed · Front Entrance · Sep 9, 2:34 PM

DS Director Smith · viewed · Clubhouse after-hours use — under consideration · Sep 9, 10:32 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Pool heater — waiting for minutes · Sep 9, 8:45 AM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 8, 9:18 PM

DS Director Smith · viewed · Front Entrance · Sep 8, 9:18 PM

DS Director Smith · viewed · Front Entrance · Sep 8, 9:17 PM

DS Director Smith · viewed · Front Entrance · Sep 8, 9:16 PM

DD Director Davis · viewed · Front Entrance · Sep 8, 7:11 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 8, 5:39 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 8, 5:39 PM

DS Director Smith · viewed · Florest Schedule · Sep 8, 5:27 PM

DS Director Smith · viewed · Florest Schedule · Sep 8, 5:01 PM

DD Director Davis · viewed · Vendor scheduling — irrigation start-up · Sep 8, 4:28 PM

DS Director Smith · viewed · Pool furniture refresh — discussion · Sep 8, 4:24 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 8, 4:23 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 8, 2:58 PM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 8, 2:58 PM

DS Director Smith · viewed · Florest Schedule · Sep 8, 2:57 PM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 7, 11:10 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 11:10 AM

DS Director Smith · viewed · Equipment purchase — \$4,850 · Sep 7, 11:08 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 11:08 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:58 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:55 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:54 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:52 AM

DS Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:52 AM

DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:52 AM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:52 AM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 7, 10:52 AM
AP	Alex President · viewed · Palm Tree Replacements · Sep 6, 9:23 PM
AP	Alex President · viewed · Palm Tree Replacements · Sep 6, 9:22 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM
DS	Director Smith · viewed · Vendor scheduling — irrigation start-up · Sep 6, 7:38 PM

Board Docket powered by StoufferAI

12. Board Administrator tools

These sit under **More**. Management staff do not get seats, members, counsel, branding, backup, or engagement end unless they are Board Administrator (or, for billing, allowed to pay).

Governance rules

Map dollar bands (and optional flags) to item types. Each version cites its source (policy, governing document, resolution). The app does **not** host a Florida-statute library. **Consent readiness** is how many eligible directors must signal Ready (vacant and recused seats are out of the count).



Governance rules 1

Consent readiness 1



N (minimum ready)

[Save readiness](#)

v1: \$0-\$3000 → acknowledgment

Source: Purchasing Policy §4.2 (hoa policy)

v1: \$0-∞ → emergency acted

When: emergency = yes

Source: Purchasing Policy §4.4 (hoa policy)

v2: \$3000-\$10000 → consent agenda candidate

Source: Purchasing Policy §4.2 (hoa policy)

v3: \$10000-∞ → board meeting required

Source: Purchasing Policy §4.3 (hoa policy)

Publish a new version

Contract flag

Capital flag

Emergency flag

[Publish version](#)

Board seats

Add or end director seats after elections. Each seat gets a welcome sign-in email. The **seat title** is whatever the board chooses (President, Secretary, Director, or another label). Board Docket does not assign President.



Board seats

Add or end seats after elections. Vacant seats are not counted as ready. The board chooses each seat's title (President, Secretary, Director, or another label). Board Docket does not assign President.

Director Smith — Director

[End seat](#)

Director Jones — Director

[End seat](#)

Director Brown — Director

[End seat](#)

Director Davis — Director

[End seat](#)

Director Liner

[End seat](#)

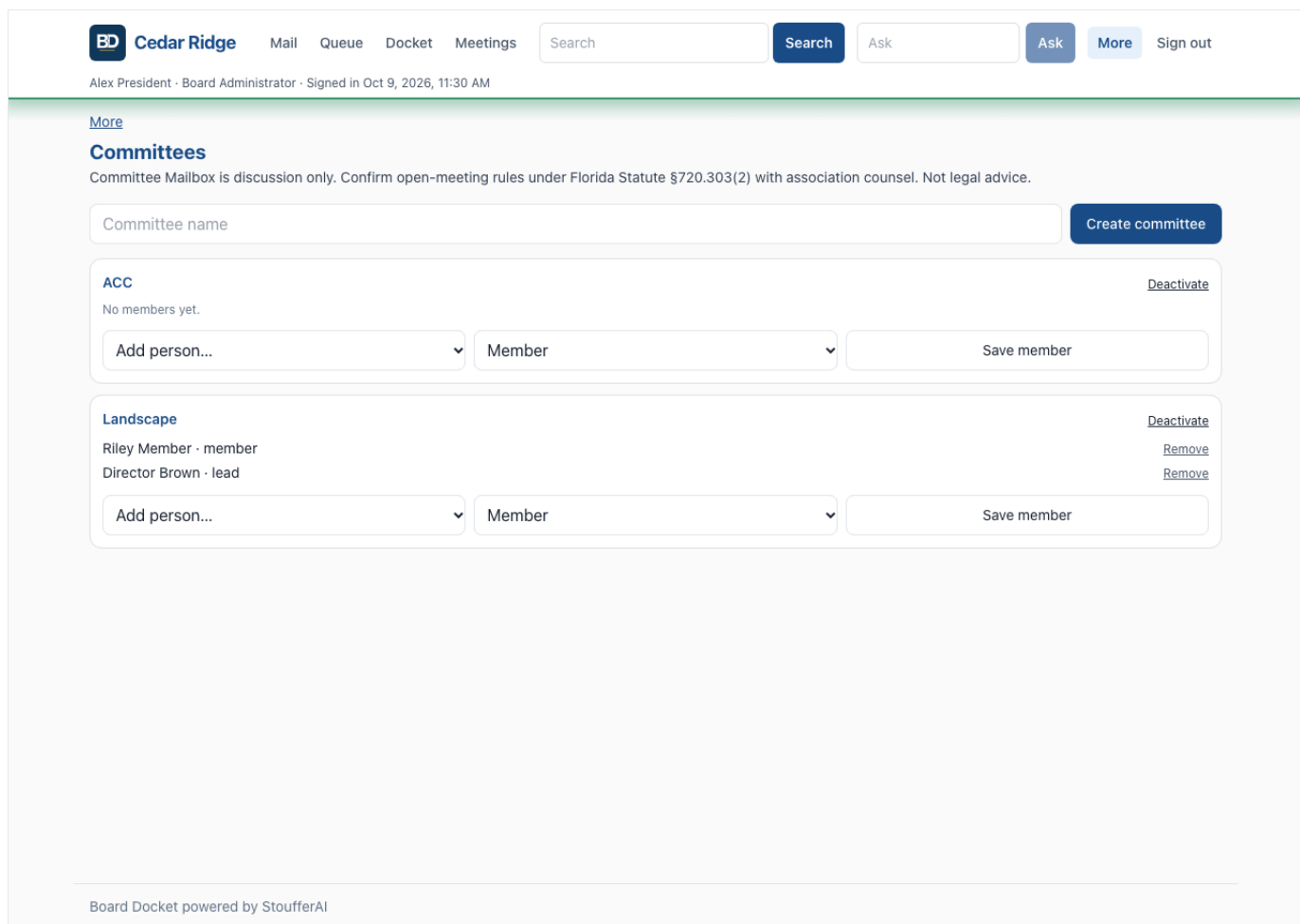
Greg Liner — Director (ended)

Add director

[Add seat](#)

Committees

More → Committees (Board Administrator). Create a committee, set one **lead**, and add members (often association members). Membership is not a HOA role — it is a separate roster. Committee users get the **Mail** tab for that room only. Elevations: Forward to lead → lead (or a seated director after Forward to board) may **Suggest for consideration**. That opens a suggested Docket item for board and management comment — not a live matter and not a vote. Management is not auto-added on Forward to board. Confirm FS 720.303(2) with association counsel. Not legal advice.



When you place an item on **Closed session**, pick **Personnel** or **Meeting with association attorney**, choose whether management attends, and check the counsel who should see that segment. Standing counsel still must be listed on each closed item. Confirm process with association counsel. The app does not decide privilege. On a records request, closed items appear as withhold candidates with that basis pre-filled; staff still type the justification.

Branding

Name, logo, support email, color. When association hosts are on, https://your-slug.boarddocket.com opens only this HOA.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

More

Sign out

Alex President · Board Administrator · Signed in Oct 9, 2026, 11:30 AM

Branding

Association URL: <http://cedarridge.localhost:3000>

Association name

Cedar Ridge

Logo URL

Primary color

Support email

Save branding

Board Docket powered by StoufferAI

Management engagement

Start or end the management company. Ending **immediately revokes** management access and keeps all records. The HOA's Stripe customer does not move to the firm.

BD

Cedar Ridge

MailQueueDocketMeetings

Search

Search

Ask

Ask

More

Sign out

Pat Manager · Management · Signed in Oct 9, 2026, 11:29 AM

Management company ⓘ

HOA management software

Not connected. Board Docket does not call Vantaca, AppFolio, CINC, or other management platforms. There is no sync. Actions stay in Board Docket.

Board Docket powered by StoufferAI

Billing

The association is the Stripe customer. Pay in the Customer Portal. After the 14-day trial, unpaid HOAs cannot **distribute** new items. Existing items stay open. A firm may pay as agent; they still do not own the data.

Download backup

More → Download backup whenever you want (daily, after a meeting, before a manager change). ZIP contains records.json plus a files/ folder of every uploaded document. The download is logged. Storage keys and Stripe ids are not in the file.

BD

Cedar Ridge

MailQueueDocketMeetings

Search

Search

Ask

Ask

More

Sign out

Alex President · Board Administrator · Signed in Oct 9, 2026, 11:30 AM

More

Ask about Board Docket

Product questions only, from the manuals and FAQ. Ask cannot see this association's docket. It is not legal advice and not a vote.

Ask

Ask

Committees

Texts

Official records

Reports

Rules

Billing

Branding

Board seats

Owners

Counsel

Download backup

Management

Management Manual

• Symbol key

Board Docket powered by StoufferAI

13. Quick workflow

Step	Who	What
1	Management	Draft → documents → Submit → Distribute (Type does not auto-roster except meeting-required / emergency). Or Delete draft if it should not go forward
2	Directors	Review / Ready / discussion / reply. Posts cannot be withdrawn.
3	Management	Answer questions (amber mark); add to a meeting if needed
4	After noticed meeting	Record Adopted / Not adopted
5	Staff	Fulfill an outside written inspection from Official Records Inspection

Step	Who	What
6	Board Administrator	Backup ZIP on a schedule you choose

What Board Docket is not

Not work-order or accounting software. No binding electronic board vote. No Approve / Reject on item responses. Silence is never Ready. No sync with Vantaca / AppFolio / CINC. No executive-session chat and no automatic privilege determination. Closed session is a noticed-meeting agenda section with a restricted packet and a named roster.

Need help?

- Deploy: [DEPLOY.md](#)
- Product rules: [PRODUCT_SPEC.md](#)
- Support: the association support email

Board Docket powered by StoufferAI