



Board Docket — Members Manual

This book is for **association members** (homeowners and other members invited to Board Docket). In the product your role is listed as member / owner.

You **track** board work and **inspect** records the association has shared or closed. You **never post**, create items, or vote in this app. You do **not** have board Mailbox unless the Board Administrator adds you to a **committee** — then the **Mail** tab is for that committee's discussion only (not a vote; recommendations are made at noticed committee meetings). 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. Your live account shows your association's name and items.

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**. Each card shows work stages (Prepare → Board review → Meeting → Closed) and status. On the public demo, each Updates row also shows **Start Date** (when the item was created) and **Last Update** (when it last changed), before any due date. Dates are month and day.

Section	Meaning
In progress	Open board work that is not yet on a meeting

Section	Meaning
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.



Riley Member · Member · Signed in Oct 9, 2026, 11:31 AM

Updates 1

In progress 1

Clubhouse after-hours use — under consideration

The board is working this. Conversation and documents open when it closes. This is not a vote.

[Open conversation](#)

Prepare

Board review

Meeting

Closed

Vendor scheduling — irrigation start-up

Correspondence — discussion only. No board vote.

Shared with members. They can see the conversation. This is not a vote.

[Open conversation](#)

Prepare

Board review

Meeting

Closed

Pool furniture refresh — discussion

Correspondence — discussion only. No board vote.

The board is working this. Conversation and documents open when it closes. This is not a vote.

[Open conversation](#)

Prepare

Board review

Meeting

Closed

On a meeting

Irrigation main break — emergency repair

\$4200.00

Acted Under Emergency Authority (Purchasing Policy §4.4)

The board is working this. Conversation and documents open when it closes. This is not a vote.

[Ratification pending](#)

Prepare

Board review

Meeting

Closed

Pool heater — waiting for minutes

\$3200.00

Consent Agenda Candidate (Purchasing Policy §4.2)

The board is working this. Conversation and documents open when it closes. This is not a vote.

[Decision recorded](#)

Prepare

Board review

Meeting

Closed

Equipment purchase — \$4,850

\$4850.00

Consent Agenda Candidate (Purchasing Policy §4.2)

The board is working this. Conversation and documents open when it closes. This is not a vote.

[On consent agenda](#)

Prepare

Board review

Meeting

Closed

Landscape contract — \$6,200

\$6200.00

Consent Agenda Candidate (Purchasing Policy §4.2)

The board is working this. Conversation and documents open when it closes. This is not a vote.

[Meeting required](#)

Prepare

Board review

Meeting

Closed

Recently completed 1

Clubhouse hours — posted notice

Closed record. Members may inspect the conversation and every document. This is not a vote.

[Completed](#)

Prepare

Board review

Meeting

Closed

2. Sign in

1. Use the link or address your Board Administrator sent.
2. Enter your email.
3. Type the **6-digit code** on that page, in the **same browser**. Codes expire and work once. If a code expires, request another.

 Board Docket

Demo Pricing FAQ Start trial Sign 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

Demo Pricing FAQ Manuals Firms Terms Privacy Sign in

Optional: **More → Texts** if you want a text when the board sends something you can see. Texts never log you in.

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 stages and status.

- You **cannot** see the conversation or files yet.

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, the conversation, and the files while it is still open.

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.

BD

Cedar Ridge

Mail

Queue

Docket

Meetings

Search

Search

Ask

Ask

More

Sign out

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

Search

Board Docket powered by StoufferAI

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.

BD

Cedar Ridge

Mail

Updates

Search

Search

Ask

Ask

More

Sign out

Riley Member · Member · Signed in Oct 9, 2026, 11:31 AM

← Updates

Pool furniture refresh — discussion ⓘ

Correspondence — discussion only. No board vote.

Neighbors asked about replacing broken lounge chairs. Talk only; not a vote.

WORK STAGES ⓘ

Prepare

Board review

Meeting

Closed

Board Docket powered by StoufferAI

Shared or closed inspectable item: Conversation (posts and files) and **Related documents**. Use **Open** and **Download** on files. 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 ⓘ

Prepare

Board review

Meeting

Closed

Conversation ⓘ



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.



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.



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.

BD

Cedar Ridge

Mail

Updates

Search

Search

Ask

Ask

More

Sign out

Riley Member · Member · Signed in Oct 9, 2026, 11:31 AM

← Updates

Clubhouse hours — posted notice

Hours posted on the clubhouse door. Record closed. Members may inspect this association record.

WORK STAGES

Prepare

Board review

Meeting

Closed

Conversation

PAT MANAGER · AUG 18, 9:02 PM

Hours are posted on the clubhouse door: weekdays 9 a.m. to 8 p.m., weekends 10 a.m. to 6 p.m. This notice is for the record. Members may inspect this closed item.

AP ALEX PRESIDENT · AUG 19, 9:02 PM

Posted copy matches what we discussed. No change needed.

Related documents

No documents yet.

Board Docket powered by StoufferAI

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 use the Compose folder (same three-pane client as management and directors).
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.

BD

Cedar Ridge

Mail

Updates

Search

Search

Ask

Ask

More

Sign out

Riley Member · Member · Signed in Oct 9, 2026, 11:31 AM

MAILBOX

cedarridge.riley.member@mail.boarddocket.local

Inbox5

Drafts2

Compose

Compose a new message in the right pane.

Available to engaged management, directors, counsel, and committee members. Association record. Visible only to participants until shared or submitted. Discussion only — decisions are made at noticed board meetings.

From

Riley Member (Cedar Ridge Landscape Committee)
cedarridge.riley.member@mail.boarddocket.local

Send as

Landscape Committee (member)

To

Any email address, comma-separated

Subject

Message

FontArialSizeNormalB/I/UnderlineHighlightClear

Attachments

Choose FilesNo file chosen

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

SendSave draft

Board Docket powered by StoufferAI

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 invite members under **Owners** in Board Docket.

Board Docket powered by StoufferAI