Association website setup

What we need from the board

Your property manager is setting up the association's website on Association Lobby. Please gather the items below. Tick each one when it's ready and write the answer, or where to find it, in the box. Then send this form back with the files.

Association

Please return by

Property manager and phone or email

Filled in by (board member)

Items marked Board or manager can come from either; if the property manager already has it, skip it. Send documents as PDFs or clear scans, and the owner list as a spreadsheet.

Association basics

- [ ] **The website address you'd like, such as atrium.associationlobby.com**
  Pick a short word or two. We set it up and secure it for you.

- [ ] **A look for the front page: Grove, Coastal or Metropolitan**
  It can be changed later.

- [ ] **Up to 4 photos of the property for the front page**
  Full-size photos straight from a camera or phone, 10 MB or smaller each. Wide shots of the building, entrance, pool or grounds work best.

  Board or manager

- [ ] **The package and features you want switched on**
  For example Documents, Maintenance, Messages, Marketplace, Reservations, Pest control, Vendors, Newsletter, Voting and the assistant.

  Board or manager

- [ ] **Billing contact: name, email and who pays (the association or the management company)**

  Board or manager

People

- [ ] **The owner list: unit number, email and name for every owner**
  A spreadsheet is fine. Use the blank template (unit_number, email, name). An owner with two emails, or two owners in one unit, gets one row each with the same unit number.

  Download the blank template (CSV):
  https://associationlobby.com/unit-owners-template.csv

- [ ] **Confirm the emails on the list are the ones owners gave the association for notices**
  We only email people on this list, and never automatically.

- [ ] **How each person lives here: full-time, part-time, tenant or other**
  Optional, but it helps the board send the right notices.
  Board or manager

- [ ] **Renters who should have access, listed under the owner's unit number and marked Tenant**
  Don't make a separate unit for a seasonal renter (such as 403S); the unit would count twice. Renters can use the site but don't vote.

- [ ] **Board members: name, office (president, vice president, treasurer, secretary, director) and unit**
  Board members sign in as owners; their office opens the board tools.

- [ ] **Official emails to show on the Board and staff page, such as president@yourassociation.org**
  Optional. Sign-in emails are never shown to residents.

Governing documents and records

- [ ] Recorded declaration of condominium (or HOA covenants) and every amendment
- [ ] Recorded bylaws and every amendment
- [ ] Articles of incorporation as filed with the state, and every amendment
- [ ] Current rules and regulations
- [ ] Approved board meeting minutes for the last 12 months

  Board or manager
- [ ] Each director's certification or education certificate

- [ ] **Owner forms, such as the Approval Request Form for changes to a unit**
  They go in Documents, Shared with residents, Forms, so every owner can find them. Use the association's own form, or start from our fillable template. Also tell us who reviews approval requests and any rules for changes (contractor insurance, work hours, how long the board takes), so owners can send requests online with their files.

  Download the Approval Request Form template (PDF): https://associationlobby.com/forms/approval-request-form-template.pdf

- [ ] **Decide which folders residents can see and which stay board and managers only**
  Private details such as social security numbers, bank details or medical information must be blacked out before anything is shared.

Source: Florida Statutes 718.111(12)(g): records a condominium with 25 or more units must post

Amenities and services

- [ ] **Spaces residents can reserve, such as the clubhouse, guest suite or the elevator for moves**
  For each: rules, open days and hours, shortest and longest booking, notice needed, fee, deposit, and whether tenants can book.

  Board or manager

- [ ] **Holidays or repair days when spaces are closed**

  Board or manager

- [ ] **Upcoming projects with dates, such as roof work, painting or pool repairs**

  They go on the project calendar so owners know what's coming, and when work will be noisy or a space is closed.

  Board or manager

- [ ] **Optional: photos of areas the board wants feedback on, such as the lobby or pool**

  Residents vote and leave notes. AI design concepts use AI credits.

  Board or manager

Voting and elections

- [ ] **The date the board adopted a resolution allowing online voting**

  In Florida the resolution sets how owners give consent and how they opt out.

- [ ] **How owners will give consent to vote online, and the deadline**

  Owners who don't consent vote on paper; the site lists who needs a paper ballot.

- [ ] **Date of the next annual meeting and how many board seats are open**
  The site works out the Florida notice deadlines: first notice 60 days before, candidate sign-up 40 days before, information sheets 35 days before.

- [ ] **Any upcoming votes, such as a door replacement or landscaping, with quotes or reports owners should read**
  Board or manager

Source: Florida Statutes 718.128: electronic voting

Building facts for Florida deadlines

- [ ] **Certificate of occupancy date for each building**
  The milestone inspection is counted from this date. The building department or the original developer's records have it.
  Board or manager

- [ ] **Number of habitable stories in each building**
  Buildings with 3 or more habitable stories need the milestone inspection and the structural integrity reserve study.
  Board or manager

- [ ] **Date of the last milestone inspection, and whether the building department requires it at 25 years**
  Some building departments, often near salt water, require it at 25 years instead of 30.
  Board or manager

- [ ] **Date of the last structural integrity reserve study (SIRS)**
  Required at least every 10 years for buildings with 3 or more habitable stories.
  Board or manager

- [ ] **Any notice periods in your bylaws that are longer than state law**
  For example, 21 days' notice of the annual meeting. The calendar uses the longer period. Note the article and section.

Source: Florida Statutes, Chapter 718

Communication

- [ ] **Group message spaces to start with, such as Community and Announcements**

- [ ] **Who writes the monthly newsletter note, and whether to send This weekend**

- [ ] **Reminder days before pest control visits and reservations (usually 3 days and 1 day before)**

  Board or manager

- [ ] **Who on the board and staff wants the 7 AM morning brief email**

  Board or manager

- [ ] **Read the privacy notice, which tells owners the board can see who has signed in**

  Read the privacy notice: https://associationlobby.com/privacy#activity

- [ ] **How owners will hear about the website: a letter, an email from the board, or a notice in the lobby**

  Invitation emails from the website are only sent when the board presses Send.

Official records requests

- [ ] **Who answers official records requests: the property manager, a board member, or both**

- [ ] **Agree that requests are answered within 10 working days**
  The site shows each due date and reminds the board as it gets close.
  Board or manager

Source: Florida Statutes 718.111(12)(c): 10 working days to provide records

Before go-live

- [ ] **Two owners sign in with their unit number and email and look around**
  Board or manager
- [ ] **The president signs in and opens the board tools**
- [ ] **Check that shared documents open for an owner and board-only folders don't show**
  Board or manager
- [ ] **Send a test maintenance request with a photo and close it**
  Board or manager

- [ ] **Pick the go-live date and send the announcement to owners**

Thank you. Questions about the website: office@associationlobby.com.

This list is a guide, not legal advice. Check your association's documents and state law with the association's attorney.