For property managers

New association setup checklist

Everything we need before a new association's website goes live. Each item says who usually provides it: the board, the property manager, or either. Work through it at your own pace; most associations finish in one to two weeks.

Association

Go-live date

Each item shows who usually provides it. Tick it when you have it, and use the box under it for notes. Send the board's list (a separate PDF) to the board for their items.

Association basics

These set up the website itself.

- [ ] **The association's legal name, exactly as filed with the state**
  Used at the top of the website and in emails to owners.
  Property manager

- [ ] **Type of association: condominium, HOA or co-op**
  The assistant and the voting rules follow the right state law for each type.
  Property manager

- [ ] **Street address, city, state and ZIP of the property**
  Shown on the website. The newsletter uses it to find local news, events and the weather.
  Property manager

- [ ] **Number of units**
  Florida condominiums with 25 or more units must post certain records on a website or app (see Governing documents).
  Property manager

- [ ] **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.
  From the board

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

- [ ] **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

- [ ] **Management company name, office phone and office email**
  Shown to residents so they know who to call.
  Property 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

Owners sign in with their unit number and the email on this list, so it needs to be right.

- [ ] **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

  From the board

- [ ] **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.

  From the board

- [ ] **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.
  From the board

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

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

- [ ] **Property managers and office staff who need access: name and work email**
  Property manager

- [ ] **Maintenance staff who take care of repair requests: name and email**
  Staff don't have to be on the owner list.
  Property manager

Governing documents and records

Upload these as PDFs or clear scans. Each one goes either in Shared with residents or in Board and managers only.

- [ ] **Recorded declaration of condominium (or HOA covenants) and every amendment**

  From the board

- [ ] **Recorded bylaws and every amendment**

  From the board

- [ ] **Articles of incorporation as filed with the state, and every amendment**

  From the board

- [ ] **Current rules and regulations**

  From the board

- [ ] **Approved board meeting minutes for the last 12 months**

  Board or manager

- [ ] **This year's annual budget, and any proposed budget for the annual meeting**

  Property manager

- [ ] **The most recent annual financial report**

  Property manager

- [ ] **A list of current contracts, and bids received in the past year**

  Florida condominiums post a summary of each bid over $500 for one year.

  Property manager

- [ ] **Current insurance policies or certificates**

  Property manager

- [ ] **Structural and life-safety inspection reports, and the latest structural integrity reserve study if one is required**

  Property manager

- [ ] **Building permits for ongoing or planned construction**

  Property manager

- [ ] **Each director's certification or education certificate**

  From the board

- [ ] **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

  From the board

- [ ] **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.

  From the board

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

Amenities and services

Only what your association uses. Skip what doesn't apply.

- [ ] **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

- [ ] **Anything staff must do before a booking, such as putting up the elevator covers**

  Property manager

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

  Board or manager

- [ ] **Pest control company, visit schedule (for example the 1st and 3rd Thursday) and time windows**

  Property manager

- [ ] **Vendor list: company, service, contact person, phone, email and website**

  Mark which vendors residents may see.

  Property 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

Only if the association will vote online.

- [ ] **The date the board adopted a resolution allowing online voting**
  In Florida the resolution sets how owners give consent and how they opt out.
  From the board

- [ ] **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.
  From the board

- [ ] **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.
  From the board

- [ ] **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

Florida associations: with these few facts, the yearly calendar shows the deadlines from Florida law, with reminders, such as election notices, the budget, the milestone inspection and the reserve study. Write "never" if something hasn't been done.

- [ ] **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

- [ ] **The month the association's fiscal year starts**
  The budget and year-end financial report deadlines are counted from it.
  Property manager

- [ ] **Date of the next budget meeting**
  Owners must get the notice and the proposed budget at least 14 days before.
  Property 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

- [ ] **Date of the last independent insurance appraisal**
  Required at least once every 3 years.
  Property 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.
  From the board

Source: Florida Statutes, Chapter 718

Communication

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

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

- [ ] **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

  From the board

- [ ] **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.

  From the board

Official records requests

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

  From the board

- [ ] **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

A last check together, about 30 minutes.

- [ ] **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**
  From the board

- [ ] **The property manager signs in with Staff sign-in**
  Property manager

- [ ] **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**
  From the board

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