For associations joining Association Lobby

Getting ready for Association Lobby

Your property management company will set up your association's private website on Association Lobby. This packet lists everything to gather. Tick each item when it's ready, write answers in the boxes, and send the packet back to your property manager with the files. Most associations finish in one to two weeks.

Association

Please send by

Property management company

Manager's name

Manager's email and phone

Board contact for questions

How to send things

Send the file	Email the file to your property manager, or put it in a shared folder (Google Drive, Dropbox or OneDrive) and send the link.
Write the answer	Write the answer in the box under the item, or in an email.
Decide together	The board decides, then writes the choice in the box. Your manager can help.
Do together at go-live	Nothing to send. You'll do this with your manager in a 30-minute check before go-live.

Tips

- Documents: PDFs or clear scans. Recorded documents should include every amendment.
- The owner list: a spreadsheet (Excel or CSV) with one row per owner: unit number, name and email.
- Photos: send the original files at full size. Don't shrink them, crop them or send screenshots; we keep them at full quality.
- Don't send passwords, bank account numbers or Social Security numbers. They aren't needed.

At a glance

Every item the association gathers, on one list. Details and answer boxes follow.

Association basics

- [ ] The website address you'd like, such as atrium.associationlobby.com — **Decide together**
- [ ] A look for the front page: Grove, Coastal or Metropolitan — **Decide together**
- [ ] Up to 4 photos of the property for the front page — **Send the file**
- [ ] The package and features you want switched on — **Decide together**
- [ ] Billing contact: name, email and who pays (the association or the management company) — **Decide together**

People

- [ ] The owner list: unit number, email and name for every owner — **Send the file**
- [ ] Confirm the emails on the list are the ones owners gave the association for notices — **Write the answer**
- [ ] How each person lives here: full-time, part-time, tenant or other — **Send the file**
- [ ] Renters who should have access, listed under the owner's unit number and marked Tenant — **Send the file**
- [ ] Board members: name, office (president, vice president, treasurer, secretary, director) and unit — **Write the answer**
- [ ] Official emails to show on the Board and staff page, such as president@yourassociation.org — **Write the answer**

Governing documents and records

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

- [ ] Each director's certification or education certificate — **Send the file**
- [ ] Owner forms, such as the Approval Request Form for changes to a unit — **Send the file**
- [ ] Decide which folders residents can see and which stay board and managers only — **Decide together**

Amenities and services

- [ ] Spaces residents can reserve, such as the clubhouse, guest suite or the elevator for moves — **Write the answer**
- [ ] Holidays or repair days when spaces are closed — **Write the answer**
- [ ] Upcoming projects with dates, such as roof work, painting or pool repairs — **Send the file**
- [ ] Optional: photos of areas the board wants feedback on, such as the lobby or pool — **Send the file**

Voting and elections

- [ ] The date the board adopted a resolution allowing online voting — **Write the answer**
- [ ] How owners will give consent to vote online, and the deadline — **Decide together**
- [ ] Date of the next annual meeting and how many board seats are open — **Write the answer**
- [ ] Any upcoming votes, such as a door replacement or landscaping, with quotes or reports owners should read — **Send the file**

Building facts for Florida deadlines

- [ ] Certificate of occupancy date for each building — **Write the answer**
- [ ] Number of habitable stories in each building — **Write the answer**
- [ ] Date of the last milestone inspection, and whether the building department requires it at 25 years — **Write the answer**
- [ ] Date of the last structural integrity reserve study (SIRS) — **Write the answer**
- [ ] Any notice periods in your bylaws that are longer than state law — **Write the answer**

Communication

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

- [ ] Who writes the monthly newsletter note, and whether to send This weekend — **Decide together**
- [ ] Reminder days before pest control visits and reservations (usually 3 days and 1 day before) — **Decide together**
- [ ] Who on the board and staff wants the 7 AM morning brief email — **Decide together**
- [ ] Read the privacy notice, which tells owners the board can see who has signed in — **Decide together**
- [ ] How owners will hear about the website: a letter, an email from the board, or a notice in the lobby — **Decide together**

Official records requests

- [ ] Who answers official records requests: the property manager, a board member, or both — **Decide together**
- [ ] Agree that requests are answered within 10 working days — **Decide together**

Before go-live

- [ ] Two owners sign in with their unit number and email and look around — **Do together at go-live**
- [ ] The president signs in and opens the board tools — **Do together at go-live**
- [ ] Check that shared documents open for an owner and board-only folders don't show — **Do together at go-live**
- [ ] Send a test maintenance request with a photo and close it — **Do together at go-live**
- [ ] Pick the go-live date and send the announcement to owners — **Do together at go-live**

The details

Tick each item when it's ready. Write the answer, or where the file is, in the box.

Association basics

These set up the website itself.

- [ ] **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.
  Decide together

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

- [ ] **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 · Send the file

- [ ] **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 · Decide together

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

  Board or manager · Decide together

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

  Send the file

- [ ] **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.

  Write the answer

- [ ] **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 · Send the file

- [ ] **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.

  Send the file

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

  Write the answer

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

  Write the answer

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**

  Send the file

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

  Send the file

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

  Send the file

- [ ] **Current rules and regulations**

  Send the file

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

  Board or manager · Send the file

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

  Send the file

- [ ] **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

  Send the file

- [ ] **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.

  Decide together

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 Write the answer

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

  Board or manager · Write the answer

- [ ] **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 · Send the file

- [ ] **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 · Send the file

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.

  Write the answer

- [ ] **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.

  Decide together

- [ ] **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.

  Write the answer

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

  Board or manager Send the file

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 Write the answer

- [ ] **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 Write the answer

- [ ] **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 · Write the answer

- [ ] **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 · Write the answer

- [ ] **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.

  Write the answer

Source: Florida Statutes, Chapter 718

Communication

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

  Decide together

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

  Decide together

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

  Board or manager · Decide together

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

  Board or manager · Decide together

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

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

  Decide together

- [ ] **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.

  Decide together

Official records requests

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

  Decide together

- [ ] **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 · Decide together

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 · Do together at go-live

- [ ] **The president signs in and opens the board tools**

  Do together at go-live

- [ ] **Check that shared documents open for an owner and board-only folders don't show**

  Board or manager | Do together at go-live

- [ ] **Send a test maintenance request with a photo and close it**

  Board or manager | Do together at go-live

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

  Do together at go-live

Your property manager takes care of these

You don't need to gather them, but it helps to know they're part of the setup.

- The association's legal name, exactly as filed with the state
- Type of association: condominium, HOA or co-op
- Street address, city, state and ZIP of the property
- Number of units
- Management company name, office phone and office email
- Property managers and office staff who need access: name and work email
- Maintenance staff who take care of repair requests: name and email
- This year's annual budget, and any proposed budget for the annual meeting
- The most recent annual financial report
- A list of current contracts, and bids received in the past year
- Current insurance policies or certificates
- Structural and life-safety inspection reports, and the latest structural integrity reserve study if one is required
- Building permits for ongoing or planned construction
- Anything staff must do before a booking, such as putting up the elevator covers

- Pest control company, visit schedule (for example the 1st and 3rd Thursday) and time windows
- Vendor list: company, service, contact person, phone, email and website
- The month the association's fiscal year starts
- Date of the next budget meeting
- Date of the last independent insurance appraisal
- The property manager signs in with Staff sign-in

What happens next

1. Your property manager reviews what you sent and asks about anything missing.
2. The manager sets up the website: your look, the owner list, documents, calendar and the features you chose.
3. A 30-minute check together: two owners, the president and the manager sign in and look around.
4. The board picks the go-live date and tells owners how to sign in.

Questions about the website: office@associationlobby.com

The checklist online, with the same items:
https://associationlobby.com/guide/setup-checklist

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