

Official Records Access and Inspection Policy

myHomeSpot approved policy | October 7, 2026 | Version 1.1

For the associations managed by myHomeSpot, subject to applicable association authorization, governing documents and controlling management agreements as described below.

[View the current policy and submit a records request](#)

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1. Purpose, application, and legal rights

This policy establishes myHomeSpot's standard terms of use for records-request and inspection services provided as part of our continued engagement by an association. Once adopted or otherwise validly authorized by the association and incorporated as permitted by its management agreement, it serves as that association's approved records-access policy.

The policy supports legal compliance, gives members clear instructions, explains their legal rights, discloses permitted fees, and promotes consistent, fair, and respectful treatment. It clarifies the responsibilities of members, the board, and management.

What "inspection" means

Inspection means viewing and reviewing existing records yourself, without purchasing dedicated human assistance. It does not include a manager's explanations, analysis, custom research, or preparation of new reports. Staff will still provide access, login or navigation help needed to make access usable, required accommodations, and any other assistance required by law.

The legal right of inspection also includes the right to make or obtain copies. Calling an appointment "self-directed" does not remove that right or turn required assistance into an optional paid service.

Your official records repository

HOA.myhomespot.com is your association's official member-portal records repository. Member-portal access and available document downloads are free. Management will make the association's nonexempt official records in its possession or control available through the portal or another lawful, usable access arrangement. Sign in with your own member credentials to view and download available documents. Contact management through the request process if you need access credentials, cannot open a document, or cannot find a requested record.

You may elect an office appointment to view the same available portal documents on our tablet. An appointment is not required to use your own portal account. The office device has a restricted connection to the records portal, with no personal email, general Internet browsing, or connected printing device.

Associations managed by myHomeSpot have no administrative employees and own no duplication equipment. myHomeSpot provides contracted administrative services. This staffing and equipment arrangement does not eliminate the association's duty to provide legally required access or copies; copying requirements depend on the law and equipment actually available, not ownership alone.

The repository is assembled from records provided to or created by myHomeSpot during its engagement. Records predating the management contract may be incomplete because they were not delivered at transition. **A record will be identified as "Not provided to myHomeSpot at transition" only when that status has been confirmed.** A document's absence from the portal alone does not establish that it was never provided or that the association has no duty to locate it. See [Section 10](#).

[Section 15 lists the required official-record categories by their statutory numbers.](#) It identifies what must be maintained when applicable; it is not a certification that every association has supplied every listed record.

Members may research the law applicable to their community:

- **Condominium associations:** [Florida Statutes, Chapter 718](#), principally §718.111(12), and [Florida Administrative Code Rule 61B-23.002](#).
- **Homeowners associations:** [Florida Statutes, Chapter 720](#), principally §720.303(4)-(5).

This policy operates subject to applicable law and the association's governing documents. Neither continued engagement of myHomeSpot nor use of its services waives statutory rights, authorizes prohibited charges, or extends a legal deadline. Applicable law controls whenever a conflict arises.

2. Who may request records and what may be ordered

This is a member records-access service, not a public-records service. Association members/property owners may request their association's nonexempt official records. An authorized representative may submit or carry out the request on a member's behalf with reasonable verification of that authority. No explanation of the member's purpose is required.

Other persons do not receive general member access merely because they are residents, vendors, purchasers, or members of the public. Applicable exceptions remain: condominium renters may inspect and copy the declaration, bylaws, rules, and the inspection reports specified in §718.111(12)(c)1.a.; prospective purchasers and others may receive particular documents or disclosures when the law requires. Subpoenas and other legal demands are handled separately. See [§718.111\(12\)](#) and [§720.303\(5\)](#).

You may request or order:

- **Self-directed access:** View the portal or schedule an inspection of identified records.
- **Copies of existing accessible records:** Identify the documents, relevant dates, quantity, and desired electronic or paper format. Available formats and lawful charges will be confirmed before paid fulfillment.
- **Optional human assistance:** Request an assistant manager or a licensed CAM for separately scoped consultation or research beyond required access.

The [statutory records index](#) includes governing documents, minutes, contracts, financial records, insurance, voting records, and other applicable categories. Protected portions will be withheld or redacted. Ordering does not create a right to exempt material or require a custom report unless another legal duty requires it.

There is no admission or equipment-use fee for inspection. Members and their representatives may photograph or scan accessible records using their own portable devices without charge. Copies and services required to be provided free remain free.

3. How to access, request, and order records

1. **Start with your member portal:** Sign in at HOA.myhomespot.com. Review or download the records available to you. You do not need to purchase an inspection appointment to use your account.
2. **Identify what you need:** Use the category numbers in [Section 15](#), document titles, and date ranges when known. Exact document titles or statute numbers are helpful but are not required to make an otherwise understandable request.
3. **Submit your request:** Use [Official Records Request Form](#), or send a written letter by certified mail, return receipt requested, to the address below. Choose self-directed inspection, copies, optional assistance, or a combination.
4. **Receive one acknowledgment, confirmation and cost proposal:** Management will confirm the active request, scope, access arrangement, estimated qualifying time, permitted rates or copying costs, estimated total, spending limit, deposit if any, account-billing arrangements, and planned start of chargeable work.

5. **Withdraw, revise, or allow requested copies to proceed:** Reply promptly if you wish to cancel or narrow the requested copies. A written request for association-provided copies is processed as an order under Section 9; no second routine proposal or acceptance email is required for those copies within the disclosed lawful scope and spending limit. Pay any lawful deposit stated in the confirmation. Genuinely optional services require separate approval. Required access and free records proceed independently.

myHomeSpot - Records Custodian
[Association Name]
225 N Pace Blvd
Pensacola, FL 32505

Include your association, name, property address, contact information, requested records and dates, and preferred access or copy format. Identify any authorized representative. Suggested appointment dates are preferences until confirmed.

Please do not email inspection requests. The designated submission methods are the form or certified letter. Email may be used for confirmations, follow-up communication, and authorized electronic delivery.

Staff must preserve the actual receipt date of a legally effective written request. The designated methods do not invalidate an otherwise legally sufficient request or restart its deadline when it is later transferred to the form.

Before online submission, the request process will display this policy, the [myHomeSpot Website Terms of Use](#), and applicable payment terms. Acceptance applies as described in [Section 14](#). A written request for copies initiates the fulfillment and lawful account-billing process in Section 9. It does not authorize undisclosed services, prohibited charges, or use of a stored card or bank account without an applicable payment authorization.

4. Acknowledgment and access deadlines

Management's acknowledgment target is **two business days after receipt**. An acknowledgment does not replace the obligation to provide timely access.

Request	Applicable requirement
HOA official-records inspection or copying	Access within 10 business days after the board or its designee receives the written request.
Condominium official-records access	Records made available within 10 working days after the board or its designee receives the written request.
Condominium's most recent annual financial report	Provided without charge within five business days after receipt of the owner's written request.
HOA annual budget or annual financial report	Provided without charge as required by the applicable statutory provisions.

These requirements come from [§720.303\(5\)-\(7\)](#) and [§718.111\(12\)-\(13\)](#).

Management will promptly seek clarification of an unclear or open-ended request while continuing to process identifiable records. The acknowledgment will identify missing property references, unclear subjects, date boundaries, or other material scope questions without requiring the member to state a purpose. myHomeSpot will

send the acknowledgment and fulfillment confirmation to the requester and copy the association board. Clarification, workload, board consultation, and estimates do not automatically suspend or restart a statutory deadline.

5. Scheduling, attendance, and inspection appointments

Days, hours, and authority to adopt rules

Inspections are scheduled by appointment, normally Tuesday through Thursday. All appointment requests start at 9:00 a.m. Central Time. The requested end time defaults to 9:30 a.m. and may be selected in 30-minute increments through 5:00 p.m. These are myHomeSpot's standard scheduling procedures, applied subject to the association's validly adopted rules and Florida law. Both HOA and condominium statutes authorize reasonable inspection rules governing time, frequency, location, notice, and manner. The association must validly adopt the rule and apply it reasonably.

Management will confirm the date, start and end times, location or electronic-access instructions, and records to be made available. Confirmation alone is not fulfillment: responsive records and usable access must actually be available on time. If the normal schedule cannot provide timely, meaningful access, management will arrange another reasonable day, time, or lawful access method. Office closures, staff availability, and a full appointment calendar do not automatically extend statutory deadlines.

Required access must be made available within **10 business days for HOAs** or **10 working days for condominiums**, subject to applicable law. Governing-document rights, required accommodations, and any shorter special-record deadline remain protected.

Scheduling authority and access requirements: [§720.303\(5\)\(a\), \(g\)](#) and [§718.111\(12\)\(b\), \(c\)1.a.](#)

Physical access will be arranged within 45 miles of the community or within the county where the community is located, as applicable. The Pensacola office will be used only when it meets those requirements.

Appointment duration and the HOA monthly limit

The law does not set a universal maximum inspection duration. For HOAs, §720.303(5)(g) prohibits rules that reduce a parcel owner's opportunity below one eight-hour business day per month. That is a minimum protected opportunity, not a state-imposed eight-hour maximum. Chapter 718 has no equivalent eight-hour monthly provision.

For Chapter 720 homeowners associations, scheduled in-person inspection is limited to one eight-hour business day per requesting member per calendar month. The member may use less than the available full day. Select a 5:00 p.m. end time for a full eight-hour inspection; selecting the default 9:30 a.m. end time or another shorter duration does not waive statutory inspection rights. This limit applies only as a reasonable, validly adopted association rule. It does not restrict ordinary access to the member portal or independent requests for copies and documents required by law.

The limit will not be used to delay a legally required response beyond 10 business days, deny access to records management failed to make available at the scheduled inspection, or override a greater right in the governing documents, a required accommodation, or a legal requirement. Additional access will be arranged when necessary for those purposes. **This monthly limit does not apply to condominiums.** See [§720.303\(5\)\(a\) and \(g\)](#).

Ordinary appointments end at the confirmed time and no later than the normal 5 p.m. closing time unless another arrangement is confirmed. A full-day appointment is 9 a.m.-5 p.m.; management-caused interruptions must not reduce the required opportunity. Condominium appointments may use the same daily hours, but additional reasonable appointments will be provided when needed for lawful access. There is no automatic monthly cutoff for condominiums.

Late arrivals, no-shows, and rescheduling

Members must arrive at the confirmed start time unless management agrees to a change. A full-day appointment describes the time available after the scheduled start; it is not permission to arrive at any time during the day. If management expressly offers an arrival window instead, that window will be honored. Scheduling requirements must be disclosed, reasonable, and applied consistently, with required accommodations and statutory access preserved.

Situation	Policy
Late arrival	Contact management before coming in late. Admission after the confirmed start is not guaranteed. A materially late arrival without an agreed change may require a new appointment under reasonable, disclosed scheduling rules. For example, a member scheduled to begin at 9 a.m. cannot assume admission at 1 p.m. Management may accommodate the late arrival when reasonable; if admitted, the original end time normally remains. A minor delay is not an automatic basis for denying otherwise available access.
Member cannot attend or wants another date	Notify management before the appointment when possible and suggest alternate dates. A replacement is confirmed when management sends the new arrangement. A preferred date is not guaranteed. Management will work in good faith to offer a reasonable alternative and will document any later date chosen by the member.
No-show	Management will document the confirmed appointment, records and access actually available, and nonattendance. The missed booking may be closed as a no-show; this does not permanently forfeit inspection rights or guarantee admission later that day. The member must contact management to arrange another appointment. The missed reservation does not automatically establish that the member used eight inspection hours or must wait until the next month.
Management cancels, starts late, or cannot provide the records	Management will promptly provide a replacement or lawful alternative, preserving the original deadline. Time lost because records, equipment, or access were unavailable is not charged against the member's inspection opportunity. An overdue failure is not cured merely by issuing a new appointment.
Repeated missed or changed appointments	Management may require written confirmation of the next appointment and coordinate a reasonable alternative, including legally sufficient electronic access. There is no automatic "three strikes" cancellation or permanent exclusion. Any additional restriction must be reasonable and consistent with access rights, accommodations, and governing documents.

A scheduling change does not restart the statutory clock. Staff will preserve the original request date and separately record when meaningful access was made available and who requested a later appointment. If a member declines or misses a timely, reasonable opportunity, that fact will be documented; it is not automatically treated as an association failure. The association cannot force a later appointment and characterize it as the member's voluntary choice.

Neither cited records provision sets a general maximum number of rescheduling requests or requires unlimited immediate appointments. The association will use reasonable scheduling and good-faith coordination, without treating a missed appointment as surrender of legal rights. Portal access and otherwise required copies continue independently.

No automatic no-show, late-arrival, or rescheduling fee applies to statutory inspection. Charges for separately ordered optional services remain limited by [Section 9.6](#).

On missed opportunities and good-faith rescheduling, see [Adelson v. Third Gulfstream Garden Apartments Condominium, DBPR Case 2008-05-2810, page 8](#). That fact-specific condominium order preserves the right to inspect while distinguishing a member's nonattendance from an association's denial. It does not establish a universal no-show penalty or replace current statutory deadlines.

What happens at the appointment

1. Management confirms the appointment, location, requested records, and the requester's eligibility.
2. Management provides the portal login link and access instructions. An office tablet is supplied for viewing the same portal documents available to the member. Use of the tablet and required login/navigation help are included in inspection.
3. The tablet is restricted to the records portal or records supplied for the appointment. It has no personal email, general web-browsing access, or connection to a printer or other duplication device. It uses only the connection needed to display the records.
4. The member reviews the documents independently. Dedicated explanations, custom research, or manager consultation are provided only if separately requested and approved as optional services.
5. The member may use a personal portable device to photograph or scan accessible records at no charge, or identify documents to be supplied as copies under Section 8.

The tablet's restrictions do not limit the records that must be made available. If requested nonexempt records are held outside the portal, management will arrange access to those records. An unavailable login, missing upload, or lack of a connected printer does not eliminate inspection or copying rights.

Management will provide a lawful means to obtain requested copies, including outside duplication where permitted. Where the law requires copies to be provided during inspection or records viewed on a screen to be printable on request, management will arrange compliant copying despite the tablet's lack of direct printing. A member will not be required to buy optional manager consultation to obtain copies.

Members must handle records carefully and may not remove or alter originals. Reasonable security measures may protect records without obstructing lawful access. Missing a confirmed appointment may require rescheduling; preserving the member's inspection rights does not require holding the appointment open for an unannounced late arrival. Actual timely availability and member nonattendance will be documented separately.

Copying and electronic-access requirements: [§720.303\(5\)\(a\)](#) and [§718.111\(12\)\(b\)-\(c\)](#).

6. Required assistance and optional services

Management will perform the work legally necessary to provide access, protect confidential information, and fulfill the association's records obligations. Members do not have to purchase optional assistance to receive these services.

Without optional assistance, inspection is generally self-directed. A dedicated manager will not be assigned to explain transactions, interpret documents, prepare summaries, or conduct custom research throughout the appointment.

Optional assistance may include explaining the organization of records, discussing particular transactions within the staff member's authority, or preparing a specifically requested analysis that the association is not otherwise required to provide.

Records and explanations are different services

For an ordinary records request, management provides access to the responsive, nonexempt written and electronic records the association possesses or controls. **The records speak for themselves; inspection does not include a manager's interpretation, a justification of board decisions, or answers to every question.** Management will identify where the requested records can be found and explain any missing-record or access issue.

Management does not independently speak for the board, supply the board's reasons, or offer a legal opinion. Questions seeking the board's position will be referred to the board; management may communicate a response the board has authorized. Required reports, disclosures, corrections, and legally required responses remain required. In particular, see the [condominium written-inquiry procedure in Section 13](#).

Optional service	Hourly rate
Assistant-manager assistance	\$75 per hour
Licensed community association manager assistance, specifically requested by the member	\$100 per hour

Assistant-manager staffing is the default for suitable work. Tasks requiring a licensed professional will be handled appropriately regardless of whether the member purchases optional CAM consultation.

Management's decision to use a CAM does not, by itself, authorize charging the member the CAM rate.

Optional work requires a written description, disclosed billing terms, an estimate, and the responsible payer's approval before it begins. Requesting a CAM does not authorize unlimited work or charges.

7. Who pays for management's work

Management compensation and member charges are separate questions.

Charges to the association: The executed management agreement, applicable service level, and valid fee schedule determine which services are included and which may be billed separately. Additional work may be billed at the applicable contractual rate when properly authorized.

Charges to the member: Only amounts legally recoverable from the member may be charged to that member. A management contract or form acknowledgment does not override statutory restrictions.

Remaining association expense: When the management agreement permits a charge that cannot lawfully be passed to the requesting member, that expense remains the association's responsibility under the agreement. It is not automatically an individual charge against the requesting owner.

For example, if an agreement permits \$75 for one hour of qualifying management work, but HOA law permits recovery of no more than \$20 from the member for that work, the member cannot be billed the \$55 difference as an "administrative" or "processing" fee.

There will be no duplicate recovery of the same expense from the member and association. Management fees must also comply with the prohibition against unreasonable or excessive fees in [§468.4334](#).

8. Copies, file formats, delivery, and fee limits

Documents available for download from HOA.myhomespot.com may be downloaded through the member's own device without a myHomeSpot copying charge. At an office inspection, the tablet is for viewing and has no connected printing device. To order copies, identify the documents and format in the request or during the appointment; management will confirm the permitted cost and fulfillment arrangement.

The associations have no administrative employees or association-owned duplication equipment. Copies may be arranged through an outside duplicating service when permitted. These facts do not remove statutory copying obligations or determine a charge by themselves.

Requested file types and custom compilations

You may request a preferred file type, such as PDF, Excel, or CSV. Management will identify the available format and any necessary redactions. An ordinary records request does not, by itself, require the association to create a new spreadsheet, combine information into a custom report, transcribe scanned pages, calculate new totals, or reverse-engineer software to match a preferred format. Applicable legal requirements and governing documents still control.

Collecting responsive records from different folders, retrieving existing electronic data, and providing usable access are not automatically custom services. Existing nonexempt data remain official records even when the software used to manage them is exempt. A software restriction or choice of format cannot be used to withhold that data. Required recordkeeping and report preparation also remain the association's responsibility.

If a requested conversion or compilation is beyond required access and is available as an optional service, management will quote it separately before doing paid work. The member may instead receive lawful access to the existing records. Required access will continue while an optional format or service is discussed.

Electronic delivery

A member may ask for electronic copies. Management will confirm whether the records can be downloaded from the portal, supplied through a secure link or email, or accessed through another lawful arrangement. The ordinary inspection right does not guarantee that every record will be emailed or delivered in a member-selected file type. Specific electronic-posting, delivery, printing, and free-copy duties remain in effect; a general portal link is insufficient if it does not provide usable access to the responsive records.

For email communications, including requests to save messages as PDFs, see the [email charge table in Section 16](#). There is no automatic PDF-conversion or records-filing charge payable by the requesting member.

Authority: [§718.111\(12\)-\(13\)](#) and [§720.303\(4\)-\(7\)](#). The distinction between existing records and information in a requested format also appears in a [DBPR condominium arbitration order dated March 25, 2003, page 6](#). That older order supports this limited distinction; current statutes govern access, delivery, and deadlines.

Homeowners associations - Chapter 720

- Retrieval/copying personnel charges are allowed only when qualifying work exceeds one-half hour **and** the request results in more than 25 copied pages. The maximum is **\$20 per hour**.
- No personnel charge applies to a request producing **25 or fewer copied pages**.
- If an association photocopier is available where records are maintained, requests totaling 25 or fewer pages must be copied on request during inspection. The charge may not exceed **25 cents per page**.

- If no photocopier is available where the records are maintained, or the requested copies exceed 25 pages, an outside service may be used. The recoverable copying charge is the **actual cost supported by the vendor invoice**.
- Free statutory documents and use of the member's own portable copying device remain free.

The \$75 and \$100 staff rates do not replace these member-charge limits. Required retrieval, preparation, monitoring, or copying cannot be relabeled as optional consultation to avoid the limits. See [§720.303\(5\)\(a\), \(g\), \(6\), and \(7\)](#).

Condominium associations - Chapter 718

Copies may be supplied at the member's reasonable expense where allowed. For specified documents, actual preparation and furnishing costs apply; free-copy duties take precedence. Chapter 718 does not automatically adopt the HOA's \$20 hourly cap, 25-page threshold, or 25-cent copying limit.

The \$75 and \$100 staff rates are not automatic condominium records-access charges. Each proposed member charge requires a lawful basis and must satisfy the applicable expense or cost restriction. There is no fee simply to inspect, and the member's own portable copying device may be used free. The most recent annual financial report requested under §718.111(13) is provided free. See [§718.111\(12\)-\(13\)](#).

Advance payment for ordered services

Lawfully chargeable duplication and optional human assistance are ordered services. The quote states the advance amount or deposit, the permitted costs covered, and how the final charge will be calculated. Advance payment is required before the paid work begins only to the extent lawful. The amount collected may not exceed the disclosed estimate of legally recoverable charges for requested copies, or the approved estimate for optional assistance. The single confirmation states the deposit, including \$0 when none is required; an estimate is not a deposit receipt. See Section 9 for the request-order process and final reconciliation.

No advance payment is required for inspection itself, use of a personal copying device, required access assistance, or documents that must be supplied without charge. See [Section 9](#) for payment authorization and reconciliation.

9. Request orders, estimates, deposits, and final billing

9.1 Rates and billing increments

Chargeable staff services are billed at the applicable hourly rate in **quarter-hour increments, rounded to the nearest 15 minutes**. Time is totaled by staff rate for each request and rounded once; separate emails, calls, or tasks are not individually rounded. For example, 20 minutes is billed as 0.25 hour and 25 minutes as 0.50 hour.

Staff service	Hourly rate	Quarter hour
Assistant-manager optional services; association-contract work when that rate applies	\$75	\$18.75
Licensed CAM specifically requested for optional assistance	\$100	\$25.00

These rates are not automatic member records-access rates. HOA retrieval/copying personnel charges remain capped at \$20 per hour and subject to the qualifying-work, time, and page-count requirements in [Section 8](#). The final

invoice states the actual qualifying time, applicable billing calculation, rate, service description, and lawful charge. It need not list every individual minute or task, but required cost substantiation will be supplied.

9.2 Statutory limits take precedence

Rounding does not establish eligibility for an otherwise prohibited fee or permit recovery above a statutory cap or actual-cost limit. Management will retain support for the qualifying work, actual time, threshold, page count, vendor expense, and recoverable amount. Where necessary, the charge will be reduced to the lawful amount.

Association-contract compensation and lawful recovery from a member remain separate under [Section 7](#). Required access, necessary redactions, retention, transmission, or fulfillment documentation do not acquire a separate member fee merely because staff time is involved. No administrative, technology, tablet, supervision, or service label may evade a statutory restriction.

9.3 What the written request orders

- **Inspection or portal access:** A request for access alone does not order paid copying, consultation, or analysis. Required access assistance and personal-device copying are free.
- **Association-provided copies:** A written request for copies is treated as the member's instruction to fulfill those copies and apply only lawfully recoverable costs, subject to the disclosed scope and estimate. Management first determines whether a member charge is permitted and sends the confirmation described below.
- **Optional services:** Assistant-manager consultation at \$75/hour and specifically requested optional CAM consultation at \$100/hour require an expressly approved scope, estimate or spending limit, and payment terms. An ordinary records request does not order these services. Management's staffing decision does not authorize a CAM charge.

9.4 One acknowledgment, fulfillment confirmation, and written proposal

myHomeSpot will send one written acknowledgment and confirmation to the requester, copying the association board. The confirmation serves as the written cost proposal for the requested copies; a second routine proposal is not required. It will acknowledge the actual receipt date, identify clear and unresolved portions of the scope, provide the free portal link and access instructions, and state the planned fulfillment arrangement.

Before chargeable copying begins, the confirmation will disclose the estimated qualifying time, applicable rate or actual-cost basis, anticipated volume or fee-eligibility assumptions, estimated member total, any separate association estimate, maximum member charge, deposit or \$0 deposit, payment terms, account-billing method, and planned start of chargeable work. Management will document delivery and provide a reasonable opportunity to withdraw or revise chargeable copying without delaying required access.

The confirmation must prominently state the estimated member costs and that management will fulfill the requested copies and automatically post actual lawful charges to the member's owner account unless the member replies withdrawing or revising the copy request before those costs are incurred. Account posting is used only where authorized by applicable law and governing documents; if that authority is absent, management will identify a lawful alternative billing arrangement. The member's written copy request is the order; failure to reply is not a new agreement to unrelated or undisclosed terms.

For requested copies within the disclosed lawful scope and spending limit, no separate acceptance email or further proposal is required unless another legal or contractual requirement requires one. The requester may reply immediately to withdraw, reduce, or clarify the order, choose free portal downloads, or use a personal copying device. An inspection-only request cannot be converted into a paid-copy order because the requester does not respond.

This process authorizes neither prohibited charges nor billing for unperformed work. It does not turn a charge into an assessment, authorize a lien, or authorize a debit from a bank account or charge to a stored card. Stored payment methods require an applicable payment authorization; an accounting entry on the owner ledger is distinct from collection of payment.

9.5 Deposits and the proposed cost limit

A confirmation may require a lawful advance payment for ordered chargeable copying or separately approved optional assistance. It must state the deposit amount and whether it is the full estimate or a partial advance; where none is required, it will state a \$0 deposit. Any lawful deposit is credited against actual recoverable charges and may not exceed the disclosed lawful estimate. A deposit request is not recorded as payment received until payment is actually received.

Management will not exceed the proposed cost without first sending a secondary written notification identifying the reason, remaining work, revised estimate, new maximum, and any additional deposit.

Chargeable work beyond the original maximum will pause until any legally or contractually required additional authorization and payment arrangements are in place. The secondary notice is needed only for a material scope change or proposed overrun; no additional proposal is issued merely to report actual costs within the original limit. Optional services beyond an approved limit require further affirmative approval.

Required access, free documents, login/navigation assistance, and personal-device copying proceed independently. A deposit or payment issue for chargeable copies or optional services does not automatically suspend or restart a statutory deadline or justify withholding otherwise required free access.

9.6 Withdrawal, revision, and missed appointments

A member may withdraw or revise the copy order or optional work by replying to the confirmation or notifying management in writing. Management will stop or adjust affected work as reasonably practicable. Only actual lawful costs already incurred within the disclosed order, including permitted unavoidable outside costs, remain chargeable; unperformed or merely reserved work is not billed. A withdrawal received before chargeable costs are incurred prevents those costs.

Canceling paid copies or optional assistance does not withdraw the underlying inspection request unless the member expressly withdraws it. A missed inspection appointment does not create a no-show fee or an automatic use of the member's full monthly inspection opportunity. Unused deposit funds are refunded after reconciliation. Attendance and rescheduling follow [Section 5](#).

9.7 Final itemized invoice and account reconciliation

The final itemized invoice is the reconciliation of the original proposal and actual fulfillment, not another proposal for consideration. It will show:

- The original estimate and disclosed maximum, plus any secondary notification and revised limit.
- The deposit requested, deposit actually received, date received, and credit applied; \$0 where no deposit was paid.
- Actual qualifying time, applicable billable-hour calculation and rate, services performed, copied page count when relevant, and permitted copying or outside-vendor costs.
- The actual lawful member charge and any separate amount payable by the association under its agreement.
- The amount posted to the owner account where authorized, less credited deposits, and the balance due or refund. A deposit will not be charged twice.

The final charge is based on actual permitted work and expense, not automatic forfeiture of the estimate or deposit. Statutorily required vendor invoices and other cost support will be supplied. Management will review disputed charges, correct errors, and refund unused advances. No duplicate recovery of the same expense is permitted.

9.8 Staff processing

1. Record the actual receipt, member or representative authority, association type, requested records, and statutory deadline.
2. Separate free access, association-provided copies, genuinely optional services, and association-contract expenses.
3. Identify unclear or open-ended terms while continuing to process identifiable records; locate responsive official records outside the portal where needed.
4. Check fee eligibility, page count, actual-cost limits, governing-document authority for owner-account posting, and the management agreement.
5. Send one acknowledgment, fulfillment confirmation and written estimate from myHomeSpot to the requester, copying the board; emphasize the lawful member cost and withdrawal/revision notice in bold and underlined text. Record delivery, the planned start, and any withdrawal, revision, optional-service approval, or lawful deposit.
6. Fulfill the active request within its disclosed lawful scope and cost limit. Send a secondary notice before a proposed overrun and obtain any required additional authorization. Preserve required access deadlines.
7. Issue the final itemized invoice, credit actual deposits, post only lawful authorized account charges, and reconcile balances or refunds.
8. Retain the request, confirmation and policy version, cost support, notices, applicable authorizations, deposit receipts, final invoice, and fulfillment record.

10. Repository completeness, protected records, and missing records

The portal is the starting point, not a limit on the records the association must maintain or disclose.

Requested nonexempt official records outside the portal will be located and made available through an appropriate method. Access is not limited to records created after myHomeSpot's management contract began.

Records predating management

Historical records appear in the repository as they are received, recovered, reviewed, and added. Records that were not delivered to myHomeSpot during transition will be disclosed as not provided when the intake history supports that conclusion. A missing portal entry alone is not proof of nondelivery.

When a requested item is absent, management will identify its status as applicable:

- **Available:** Posted in the portal or held elsewhere and available for inspection/copying.
- **Not provided to myHomeSpot at transition:** Confirmed missing from the records transferred; recovery or follow-up status will be stated.
- **Not yet located or awaiting verification:** Its existence, custody, or delivery history has not been established.
- **Restricted:** Withheld or redacted under an identified legal exemption.

- **Not applicable / not created / no longer retained:** Used only when supported by the association's circumstances and applicable retention requirements.

Management will pursue appropriate recovery and notify the board of unresolved required records. Changing management companies does not reset retention periods or excuse the association's duties. Condominium law expressly requires reasonable good-faith efforts to obtain and recover unavailable records. See [§718.111\(12\)\(b\)](#).

Protected information

Protected legal communications, exempt personnel and medical records, specified personal information, security credentials, and other statutory exemptions will be withheld or redacted. The protected material will be separated from otherwise accessible portions where appropriate. Official-record status does not necessarily mean unrestricted member access.

[Section 16 explains how these rules apply to internal management emails, manager-board communications, and messages among directors.](#) Labels such as "internal" or "confidential" do not by themselves establish a legal exemption.

For condominiums, management will simultaneously provide the statutory checklist of records made available and records not made available and retain it for seven years. See [§718.111\(12\)\(c\)](#).

11. Responsibilities of members, management, and the board

Members and representatives should identify the requested records, verify eligibility or authority reasonably, use their own portal credentials, attend confirmed appointments, protect original records, and promptly withdraw or revise unwanted copy orders, pay lawful disclosed charges and deposits, and separately approve optional services.

Management will identify the applicable law, preserve receipt dates, track deadlines, provide the portal link and required access assistance, arrange access to records held elsewhere, protect exempt information, and distinguish required services from optional work. Management will maintain appropriate fulfillment and legally necessary cost support; final member invoices will reconcile the original estimate, deposits, actual qualifying time, rates and lawful charges without requiring a minute-by-minute task log.

The board remains responsible for the association's legal compliance, records retention, valid policy adoption, and contractual funding obligations. The association's lack of administrative employees or duplication equipment does not shift prohibited charges to members. A routine legally valid request does not require a discretionary board vote before fulfillment.

No member's access will be obstructed because of criticism, a disagreement, or refusal to buy optional services. Required access cannot be made conditional on a release of claims or acceptance of unrelated payment obligations.

12. Frequently asked questions

Where do I find my association's official records?

Start at HOA.myhomespot.com. Sign in with your member credentials. If an item is not visible or your login does not work, submit a request identifying the problem. Records outside the portal remain subject to lawful access.

What is an inspection?

It is your self-directed review of existing accessible records. It does not include dedicated explanations or custom research. Required access assistance, reasonable login/navigation help, and legally required accommodations remain available.

Can I inspect the same records at the office?

Yes, by confirmed appointment at a compliant location. A restricted tablet displays the portal records. It has no personal email, general Internet browsing, or connected printer. You may use your own device to photograph/scan records free or order copies through management.

Can the association choose the days and hours for inspections?

Yes, through reasonable, validly adopted rules. This policy normally offers appointments Tuesday-Thursday starting at 9 a.m. Central, with a requested end time from 9:30 a.m. through 5 p.m. in 30-minute increments, with alternatives when necessary for timely, meaningful access. The normal schedule cannot override statutory deadlines, greater governing-document rights, or required accommodations. See [Section 5](#).

Is eight hours the maximum inspection time allowed by law?

No. Chapter 720 protects an opportunity of at least one eight-hour business day per month. This policy uses that as its ordinary HOA monthly limit, subject to the legal exceptions in Section 5. Chapter 718 has no equivalent eight-hour monthly rule. Portal access is not limited to once a month.

What if I am late, miss my appointment, or need to reschedule?

Contact management promptly and obtain confirmation before assuming you may arrive later. A 9 a.m. appointment does not guarantee admission at 1 p.m. A materially late arrival or no-show may require a new appointment under reasonable, disclosed rules. Your inspection rights remain, but the missed booking need not be held open. Management will document timely availability and coordinate reasonable rescheduling. See the [attendance and rescheduling table](#).

Can only members request records?

General member access belongs to association members/property owners and may be exercised through authorized representatives. Condominium renters have limited statutory access to specified documents. Other legal disclosure rights and demands are handled separately.

What can I order?

You may request access, electronic or paper copies of existing accessible records, and optional assistant-manager or CAM services. The numbered index in Section 15 follows the statute for your association type. Exempt information cannot be ordered merely by paying a fee.

Why are older records missing?

Some records predating management may not have been delivered at transition. Management will confirm the status rather than assume the reason from an empty portal folder. The association's duty to retain or recover required records continues.

Must I pay to inspect or get help signing in?

No inspection admission fee applies. Management supplies usable access and required help. Optional dedicated consultation and lawfully chargeable copies may involve a cost; required free documents remain free.

When do I pay for duplication or optional assistance?

The single confirmation states the lawful deposit and payment terms, including \$0 when no deposit is required. A written copy request is processed within its disclosed scope and spending limit unless withdrawn or revised; optional assistance needs separate approval. The final itemized invoice reconciles the estimate, deposit actually paid and actual lawful costs. No further routine proposal is issued within that limit. Required access continues independently.

Will my invoice show every minute worked?

No minute-by-minute task log is required. The final invoice shows the original estimate, deposit, actual qualifying time, applicable billing calculation, rate, services, lawful costs and balance or refund. Staff-service rounding is subject to statutory safeguards, and required cost support will be supplied.

Must I approve another proposal after requesting copies?

No second routine proposal is required. Your written copy request initiates fulfillment; the acknowledgment is also the confirmation and written estimate. Requested copies proceed within the disclosed lawful scope and maximum unless you withdraw or revise the order before costs are incurred, subject to any lawful deposit and account-billing authority. Optional services still require separate approval. Inspecting records or downloading available portal documents is free.

Will costs automatically be posted to my owner account?

The confirmation will state the estimate and owner-account billing arrangement. Actual lawful copy charges are posted automatically only when account posting is authorized and the active copy request has not been withdrawn or revised before those costs are incurred. No automatic card or bank debit, prohibited fee, assessment status, or lien is created by this process. Management must send a secondary notice before exceeding the original maximum and obtain any required additional authorization.

If I request 25 or fewer HOA pages, is everything free?

No personnel charge may be imposed for that copying request. Permitted copying costs may still apply unless the documents must be supplied free.

Does the monthly management fee cover every request?

The association's executed agreement determines included and additional services. Additional compensation allowed by that contract does not expand what may be charged to an individual member.

Can I request a CAM?

Yes. Optional CAM consultation specifically requested by the member is \$100/hour, subject to an approved scope and payment terms. The assistant-manager rate is \$75/hour. Neither rate overrides statutory member-charge limits.

Can I photograph records instead of ordering copies?

Yes. You and your authorized representative may use your own portable device to copy accessible records without a fee for using that device.

Can I request PDF, Excel, CSV, or the original file?

Yes, you may state a preference. That does not automatically require conversion or creation of a file the association does not maintain. Management will confirm an available, usable format with protected information removed. Existing electronic data cannot be withheld simply because they are stored in software. See [Section 8](#).

Must the association aggregate, decompile, or reorganize records for me?

Ordinary access concerns existing records, not a new custom analysis. For example, existing invoices may be provided without creating a new vendor-by-vendor spreadsheet. Ordinary collection and retrieval of responsive records are still part of fulfilling access. Required reports must still be prepared, and an existing spreadsheet cannot be withheld merely because a new spreadsheet would not be required.

Must all requested records be delivered electronically?

Not automatically. Request electronic copies and management will confirm the lawful delivery or access arrangement. Portal downloads, secure links, and email may be available; required electronic postings and specific delivery duties still apply. The policy does not promise every record by email or in every requested format. See [Section 8](#).

Can I require management to explain every record or speak for the board?

An ordinary inspection provides records for your review, not a promise of explanations, legal advice, or the board's reasoning. The records speak for themselves. Management may convey an authorized board response and provide separately approved optional help within its authority. Legally required answers remain required.

What if I offer to withdraw my inspection request if someone answers all my questions?

Management will refer questions requiring a board response to the board and identify any optional assistance it can offer. That proposal does not itself cancel the inspection request or pause its deadline. Management will continue records access unless you clearly withdraw the request; a conditional withdrawal takes effect only when you confirm the condition has been met. Accepting answers does not waive future statutory access rights.

Are condominium written questions to the board different?

Yes. A qualifying certified written inquiry from a residential condominium unit owner triggers a separate board-response duty. It cannot be dismissed as "the records speak for themselves" or made conditional on paid consultation. See [Section 13](#).

Can I request internal management or board emails?

Yes, when they are official records of your association and are not legally exempt. The subject, purpose, and association-record status matter; copying a manager or director does not make every message disclosable. Personal-device use is not a blanket exemption. See the [email categories in Section 16](#).

Can emails be restricted to viewing because the conversation keeps changing?

No blanket restriction applies. Existing messages can be preserved and supplied for the requested period while later replies are retained separately. A screen viewer may be used, but lawful copying rights remain. See [Section 16.3](#).

What will it cost to obtain emails as PDFs?

There is no automatic charge per email or PDF page. Required copying is subject to the applicable statutory limits. A genuinely optional custom packet may be quoted at \$75/hour for assistant-manager work, or \$100/hour for specifically requested optional CAM work, subject to the safeguards in the [Section 16 charge table](#).

Does accepting the policy waive my rights?

No. A written copy request is processed under the disclosed lawful order and estimate; optional services require separate approval. Any affirmative policy acceptance covers only lawful terms applicable to the transaction. It does not waive records rights, authorize prohibited charges, or compel acceptance of unrelated dispute-resolution terms to exercise statutory access.

What if I disagree with a charge or a missing-record response?

Request a written explanation and review by management and the board. Statutory deadlines and available legal remedies continue to apply.

13. Separate legal processes

Estoppel requests, purchaser or lender questionnaires, subpoenas, litigation demands, and legally required owner inquiries may have separate requirements, deadlines, and fee limits. They will be identified and handled under their applicable rules rather than automatically billed under this policy's optional hourly rates.

Residential condominium owners' written inquiries to the board

Under [§718.112\(2\)\(a\)2.](#), the board must respond in writing within **30 days** after receiving a unit owner's inquiry by certified mail. The response must answer substantively or state that legal advice or advice from the Division has been requested. If legal advice is requested, a substantive response is due within **60 days of receipt of the inquiry**; if Division advice is requested, it is due within **10 days after receipt of that advice**.

A properly adopted reasonable rule may limit responses to one written inquiry per unit per 30-day period, with additional inquiries answered in subsequent periods as the statute provides. A required board response is not an optional paid consultation.

Management will route qualifying inquiries to the board and track their deadlines separately from records requests. A letter requesting both answers and records is handled under both applicable procedures; the board-inquiry period does not extend the records-access deadline. Chapter 720 does not establish this same general certified-inquiry procedure, but other applicable legal, governing-document, and contractual response duties remain in effect.

14. Adoption, submission, and applicable terms

The association will document authorization and the effective date of this policy and its revisions. Changes to management compensation or account-billing authority must follow the governing documents, applicable law, and contractual process. Continued management engagement alone does not substitute for necessary association approval. Version 1.1 establishes the single-confirmation and final-invoice process prospectively; it does not retroactively impose new optional-service obligations or charges for earlier work.

Terms disclosed before submission and fulfillment

The online request process will conspicuously present this policy and links to the [myHomeSpot Website Terms of Use](#) and applicable payment terms before submission. Affirmative acceptance of disclosed website terms applies only to lawful terms governing the transaction. A certified letter or legally sufficient email request is not acceptance of unrelated website terms.

A written request for association-provided copies is an instruction to fulfill those existing records, subject to the statutory copying limits and the single confirmation and estimate in [Section 9](#). No second routine proposal or separate acceptance email is required for requested copies within the disclosed lawful scope and maximum unless another law or controlling agreement requires one. Management must disclose lawful costs and the withdrawal/revision opportunity before incurring chargeable costs, verify any account-posting authority, and honor timely withdrawal or revision.

A request for access alone does not order paid copies. Optional research, interpretation, custom analysis, or consultation requires a separate express order and approval of its scope, estimate or spending limit, deposit, and payment terms. The copy-order process does not authorize undisclosed optional services, prohibited fees, or charges to a stored card or bank account without applicable payment authorization.

Request acknowledgment

I confirm that I am a member/property owner or authorized representative, or have another applicable legal right to the specified records. I understand that member-portal access, available downloads, required access assistance, and personal-device copying are free. If I request management-provided copies, my written request is an order for those copies, subject to a disclosed lawful estimate and spending limit. Management will confirm the order and proceed unless I promptly withdraw or revise it before costs are incurred, subject to any lawful deposit. Actual lawful costs may be posted to my owner account where authorized and will be reconciled on a final itemized invoice showing the estimate, deposits and actual calculations. Management will notify me before a proposed overrun and obtain any additional authorization required. Optional services and stored payment methods require separate authorization. This acknowledgment does not waive statutory rights or authorize prohibited charges.

Required access and free copies do not depend on purchasing services, releasing claims, or accepting unrelated arbitration or liability terms. A legally sufficient request will be processed if a requester declines a nonrequired acknowledgment. Failure to reply to a copying estimate is not assent to an unrelated agreement or waiver of access rights.

Management will preserve the policy version, written copy request, delivered confirmation and estimate, scope changes, notices, applicable optional-service and payment authorizations, and final invoice. Florida's electronic-transaction law governs electronic assent where it is required. An internal owner-ledger entry and collection through a stored payment method are separate actions.

The association and management will periodically review the policy for legal changes. Applicable law, required disclosure rights, governing documents, and controlling agreements prevail over a conflicting policy term.

15. Official records index aligned to Florida law

Use the H or C number below when requesting a category of records, if helpful. The number matches the numbered item in the applicable statute. Categories apply only where relevant to the association. These lists describe the required inventory; they do not certify that each listed record exists, has been received by myHomeSpot, or is posted in the portal.

Existing nonexempt records may be inspected or copied. Protected portions remain restricted even if the document is an official record. Availability, missing-record status, and records predating management are addressed in Section 10.

15.1 Homeowners associations - §720.303(4)(a)

Statutory item	Records required when applicable
H01 §720.303(4)(a)1.	Plans, specifications, permits, and warranties for common-area improvements and other property the association must maintain, repair, or replace.
H02 §720.303(4)(a)2.	Bylaws and all amendments.
H03 §720.303(4)(a)3.	Articles of incorporation and all amendments.
H04 §720.303(4)(a)4.	Declaration of covenants and all amendments.
H05 §720.303(4)(a)5.	Current association rules.
H06 §720.303(4)(a)6.	Minutes of all board and member meetings.
H07 §720.303(4)(a)7.	Current member roster, designated mailing addresses, parcel identifications, and electronic-notice contact information required by the statute. Protected contact information is subject to access restrictions.
H08 §720.303(4)(a)8.	Association insurance policies or copies.
H09 §720.303(4)(a)9.	Current association contracts, including management agreements and leases. Work bids are also official records; their specific retention period applies.
H10 §720.303(4)(a)10.	Financial and accounting records: (a) itemized receipts and expenditures; (b) member accounts and periodic statements showing charges, payments, and balances; (c) tax returns, financial statements, and financial reports; (d) other records identifying, measuring, recording, or communicating financial information.
H11 §720.303(4)(a)11.	The disclosure summary described in §720.401(1).
H12 §720.303(4)(a)12.	Ballots, sign-in sheets, proxies, and other paper or electronic records of owner voting.
H13 §720.303(4)(a)13.	Affirmative acknowledgments under §720.3085(3)(c)3. These must be maintained but are excluded from member inspection under §720.303(5)(g)9.
H14 §720.303(4)(a)14.	Other written records related to association operations that are not separately listed.

15.2 Condominiums - §718.111(12)(a)

Statutory item	Records required when applicable
C01 §718.111(12)(a)1.	Developer-provided plans, permits, warranties, and other items required by §718.301(4).
C02 §718.111(12)(a)2.	Recorded declaration for each condominium operated and every amendment.
C03 §718.111(12)(a)3.	Recorded bylaws and every amendment.
C04 §718.111(12)(a)4.	Certified articles of incorporation or other creating documents, and amendments.
C05 §718.111(12)(a)5.	Current association rules.
C06 §718.111(12)(a)6.	Minutes of all association, board, committee, and unit-owner meetings, and recordings of meetings conducted by video conference. The statute contains a specific retention rule for video recordings when approved minutes exist.
C07 §718.111(12)(a)7.	Current unit-owner roster, mailing addresses, unit identifications, voting certifications, and required telephone/electronic-notice information. Statutory privacy and disclosure restrictions apply.
C08 §718.111(12)(a)8.	Current insurance policies for the association and condominiums it operates.
C09 §718.111(12)(a)9.	Current management agreements, leases, and other contracts imposing an obligation or responsibility on the association or unit owners.
C10 §718.111(12)(a)10.	Bills of sale or transfer for association-owned property.
C11 §718.111(12)(a)11.	Association and separate condominium accounting records: (a) itemized receipts/expenditures, bank statements, and ledgers; (b) supporting invoices, transaction receipts, and deposit slips; (c) unit accounts and periodic statements; (d) audits, reviews, accounting statements, structural integrity reserve studies, and financial reports; (e) work contracts and bids.
C12 §718.111(12)(a)12.	Ballots, sign-in sheets, proxies, and other paper or electronic voting records.
C13 §718.111(12)(a)13.	Rental records when the association acts as the rental agent for units.
C14 §718.111(12)(a)14.	Current statutory condominium question-and-answer sheet. Rule 61B-23.002(7)(a) requires the completed DBPR form and an update every 12 months.

Statutory item	Records required when applicable
C15 §718.111(12)(a)15.	Milestone inspection reports under §553.899, developer turnover inspection reports under §718.301(4)(p), and other structural or life-safety inspection reports.
C16 §718.111(12)(a)16.	Bids for materials, equipment, or services.
C17 §718.111(12)(a)17.	Affirmative acknowledgments under §718.121(4)(c). These are maintained but excluded from member inspection under §718.111(12)(c)5.h.
C18 §718.111(12)(a)18.	All building permits.
C19 §718.111(12)(a)19.	Satisfactorily completed board-member educational certificates.
C20 §718.111(12)(a)20.	Affidavits required by Chapter 718.
C21 §718.111(12)(a)21.	Other written records related to association operations. Rule 61B-23.002(7)(b) expressly includes correspondence and other written communications with DBPR's Division.

15.3 Retention and required online records

HOAs: Official records are generally retained for at least seven years unless a longer governing-document requirement or a specific statutory rule applies. Work bids and voting records have specific one-year rules. The association's written retention policy must also be made available as required by §720.303(4)(c).

Condominiums: Items C01-C06 are generally permanent records, subject to the statute's specific exception for video-conference recordings when approved minutes exist. Other records generally have at least seven-year retention, with specific rules including one year for bids and voting records and 15 years for structural integrity reserve studies and the specified structural/life-safety inspection reports. A preservation obligation, dispute, or other applicable requirement may require longer retention.

The statutory website-posting lists are separate from the full official-record inventory. HOAs with 100 or more parcels follow [§720.303\(4\)\(b\)](#); condominium associations managing 25 or more units without timeshare units follow [§718.111\(12\)\(g\)](#). For qualifying condominiums, required digital records generally must be posted within 30 days of receipt or creation unless a shorter period applies. Specific meeting notices and other required postings retain their own deadlines.

Required portal content includes the governing documents, financial and budget materials, applicable contracts and bids, meeting notices and materials, and other items identified in those provisions. It must be maintained with the required access controls and redactions. Records need not be on the general member portal to remain subject to a lawful inspection request.

Legal sources: [§720.303](#); [§718.111](#); [§718.112](#); [Rule 61B-23.002, effective June 18, 2026](#). This policy does not certify the completeness of any association's records or replace its governing documents.

16. Email communications, PDF copies, and charges

An email can be an official record before it is converted to PDF, uploaded to the portal, or placed in a records folder. The question is whether it is a record of the association related to its operations, and whether any legal exclusion applies. This section governs records access; it does not authorize disclosure of unrelated mailboxes or protected information.

16.1 Which emails must be made available?

Communication	How it is treated
Between management staff	Reviewed by content and purpose. Messages documenting the association's operations or work performed on its behalf-such as vendor instructions, maintenance activity, financial transactions, or handling of an owner complaint-are evaluated as association records. Internal circulation alone does not exempt them. Purely management-company business, unrelated clients' records, and personal messages are not automatically records of the requesting member's association.
Between a manager and the board or a director	Messages constituting association records about association business are made available, subject to legal exemptions. This includes qualifying instructions, reports, correspondence, and attachments. The identity of the sender or recipient alone does not determine access.
Between board members	Messages that otherwise qualify as association records are reviewed for disclosure even if sent through personal accounts or devices. Purely personal communications unrelated to association operations are outside the ordinary records request. The policy does not treat all director emails as automatically available to members or automatically exempt.
Mixed messages or threads	Accessible portions and responsive attachments are separated from legally protected material where appropriate. A protected message does not automatically exempt every earlier message in the thread. Records about other associations and unrelated personal material are not included.

The statutory categories include other written association records related to operations: [§718.111\(12\)\(a\)21](#), and [§720.303\(4\)\(a\)14](#). The categories above apply those standards; disputed classification depends on the particular record and applicable law.

For condominiums, DBPR's [Hanseman declaratory statement, DS 2021-014, January 6, 2022, paragraphs 11-14](#), found no personal-device exclusion for emails that otherwise qualify. It expressly did not decide the status of individual emails. An older [Humphrey arbitration order, March 30, 2009](#), reached a narrower result on its facts. These condominium decisions do not establish that every HOA or director email is disclosable. This policy therefore uses individual review rather than a blanket personal-account exemption.

16.2 What will be withheld or redacted?

Applicable exclusions include lawyer-client privileged communications, protected attorney work product, exempt personnel and medical information, specified personal information, security credentials, and other exclusions in [§718.111\(12\)\(c\)](#) or [§720.303\(5\)\(g\)](#). The rules for disclosure of email addresses differ between those chapters; staff will apply the correct rule rather than remove or disclose every address automatically.

Calling a message "internal," "draft," "confidential," or copying an attorney does not by itself establish privilege. Lawyer-client privilege depends on the legal requirements of [§90.502](#). A complaint, disagreement, or embarrassing statement is not exempt merely for that reason. Management will identify the applicable basis for withholding without

revealing the protected content. Uncertain privilege or classification questions will be referred promptly for legal review; this is not an automatic extension of the access deadline.

16.3 Viewing, copies, and continuing email threads

Management may provide a controlled, read-only display of the responsive, reviewed messages. Members do not receive access to a live staff mailbox, login credentials, or unrelated messages. **Read-only protects records against editing; it does not mean “inspection with no right to copies.”** The statutes permit screen access with printing upon request and preserve copying rights, including use of a member’s own portable copying device without a device-use fee. See [§718.111\(12\)\(b\)-\(c\)](#) and [§720.303\(5\)\(a\)](#).

A conversation may continue, but a sent or received message is an existing record. Management will identify the date range covered by the response and preserve responsive messages and attachments. Later replies do not justify delaying access to earlier records, overwriting them, or requiring the member to wait until the discussion is “final.” An ordinary request does not create a subscription to a live inbox.

Records may be retained electronically without converting every message to PDF. If PDF copies are supplied, they should preserve the message text, sender and recipient identities, subject, date and time, and responsive attachments, subject to lawful redactions. Repeated quoted material may be consolidated only if no distinct responsive message, attachment, or material context is lost. A PDF is a copy of the identified records, not a promise that the conversation has ended.

Required retention follows [Section 15.3](#) and any applicable preservation hold. Required association emails must be retained whether or not a member pays for a copy. Posting every email in the general member portal is not a prerequisite to official-record status or access; protected originals and reviewed access copies may be kept separately.

16.4 Who pays for retrieval, PDF preparation, and filing?

Work or service	Charge and responsible payer
Inspection and personal-device copying	No inspection admission fee and no charge for using the member's own copying device. Required access assistance is not an optional consultation.
Routine retention, filing, or bringing required records into order	An association recordkeeping responsibility. Management's compensation is governed by the executed management agreement. There is no automatic member charge to "make an email official," archive it, or correct incomplete filing.
HOA retrieval and copying, including an email-copy request	Only qualifying member charges under §720.303(5)(g): retrieval/copying work must exceed one-half hour and the request must result in more than 25 copied pages; qualifying personnel charges may not exceed \$20/hour . The assistant-manager and CAM rates do not replace this cap. Email count is not page count. Electronic-copy eligibility must be established; pages may not be inflated to create a fee. The 25-cent photocopier allowance is not an automatic fee for each PDF page. Permitted outside duplication costs require an actual vendor invoice.
Condominium email copies	Only a lawful, reasonable copying expense under §718.111(12)(c), disclosed in a quote. There is no automatic \$75 or \$100 hourly email-access fee. Chapter 718 does not simply adopt the HOA fee schedule. Free-copy duties and the right to inspect remain protected.
Genuinely optional custom PDF packet or analysis	For separately requested work beyond required access and copying—for example, a new custom index or analytical summary— \$75/hour for assistant-manager work , or \$100/hour for specifically requested optional CAM work , subject to an approved scope and lawful charge. Apply the nearest-15-minute billing rule in Section 9.1 and its statutory safeguards. An ordinary export, necessary redaction, or required copy cannot be relabeled "custom PDF work" to evade a fee restriction.

Before any paid email work, the quote will distinguish legally recoverable copy charges, genuinely optional services, and charges payable by the association under its contract. The single acknowledgment and confirmation will state the scope, rate or cost basis, estimate and spending limit, deposit if any, account-billing arrangement, and withdrawal/revision opportunity. Requested copies proceed under Section 9; actual lawful costs are reconciled on the final itemized invoice without another routine proposal. Optional work requires separate approval. No unspecified PDF, technology, legal-review, redaction, or filing fee is charged to the member. Association compensation that cannot lawfully be passed through remains an association expense as provided in [Section 7](#).

The requester's decision not to buy optional work does not excuse providing lawful access and copies. Copying limits apply regardless of whether management chooses PDF as the fulfillment method. See [Section 8](#) and [Section 9](#).

16.5 Information that helps locate email records

Identify the association, subject or event, approximate date range, and known participants when possible. Exact subject lines and a reason for the request are not required. Staff may seek useful clarification without automatically rejecting an understandable request or restarting its legal deadline. Management and directors will identify relevant record locations, preserve responsive material, and provide the nonexempt records through the confirmed access arrangement.