Panther Ridge HOA Policy on Homeowner Records Requests and Transparency

Adopted by the Board of Directors on [Insert Date]

1. Purpose

To enhance transparency and accessibility while protecting the privacy of homeowners, the Board of Directors of Panther Ridge Homeowners Association adopts this policy regarding the handling of official records requests in accordance with Florida Statutes §720.303(5).

2. Electronic Access as Default

The Association's management company (Associa) shall fulfill all official records requests from homeowners **electronically by default**, unless the homeowner explicitly requests to inspect records in person or receive printed copies.

3. Submission of Requests

Homeowners may submit written records requests via:

- Email
- The TownSq portal or other board-approved digital platform
- Certified mail or in-person delivery

Requests must identify the requesting homeowner and property address, and clearly specify the records sought.

4. Permitted Records for Disclosure

Only those records defined as "official records" under Florida Statute §720.303(5) shall be provided. These include but are not limited to:

- Governing documents (Articles, Bylaws, Declaration)
- Meeting minutes
- Financial reports and budgets
- Insurance policies
- Contracts
- Rules and regulations

The following categories of records **shall not** be disclosed, per Florida law and this policy:

- Records protected by attorney-client privilege
- Information obtained in connection with the approval of a lease, sale, or other transaction (e.g., credit reports, background checks)
- Medical records
- Personnel records of Association or management company employees
- Any record that would disclose the account status of other owners
- Any record containing sensitive or personally identifiable information such as email addresses, phone numbers, or unredacted unit ledgers, unless disclosure is required by law or has been expressly authorized in writing by the affected party.

5. Redaction Requirement

If requested records contain any protected or confidential information, the management company shall **redact** such information prior to release, and the redacted version shall be clearly labeled as such.

6. Delivery Format and Timeframe

Records shall be delivered via:

- Email (PDF or scanned files)
- Secure online link
- TownSq portal (if enabled)

All responses must comply with the statutory deadline of **10 business days** from the date of receipt of a valid request

7. On-Site Inspection Optional

Homeowners retain the right to inspect records in person at the management company's office during regular business hours, upon reasonable notice.

8. Fees and Charges

No charge shall be imposed for electronic access to records. Charges for physical copies or scanning paper-only documents must be reasonable, limited by statute, and pre-approved by the Board

9. Enforcement and Compliance

Per Section 3 and Section 7 of the Management Agreement between Panther Ridge HOA and Associa, the management company shall administer Association affairs in accordance with Board policies. Therefore, Associa shall adhere to this policy in its entirety, unless doing so would require material modifications to its systems or impose undue security risk, in which case such concerns must be communicated in writing to the Board within 10 business days.

10. Review and Amendment

This policy may be reviewed or amended by majority vote of the Board at any time in accordance with the Association's governing documents and applicable Florida law.