



**Brickell
Homeowners
Association**

QUICK AUDIT CHECKLIST / ASSOCIATION RECORDS

Can an owner find what they need?

A practical BHA-branded check for access, organization, currency, and required condominium records.

QUARTERLY REVIEW | 15 TO 20 MINUTES

Brickell Homeowners Association | Condo Leadership Resource Center

01 / REVIEW LIKE AN OWNER

Association records portal quick audit

Test the portal from outside the management network. Check the box only when the item is current, clearly labeled, and easy for an authorized owner to find.

ASSOCIATION / BUILDING

AUDIT DATE / REVIEWER

ACCESS & NAVIGATION

- ☐ Owner credentials work from a normal external connection.
- ☐ Password reset and support instructions are visible.
- ☐ Current documents are easier to find than archived versions.

GOVERNANCE & MEETINGS

- ☐ Governing documents and current rules are posted.
- ☐ Meeting notices, agendas, and supporting materials are organized by date.
- ☐ Director education, certifications, and conflict disclosures are available when required.

FINANCIAL

- ☐ Adopted budget and required financial reports are current.
- ☐ Monthly income or expense statements used for meetings are posted when required.
- ☐ Contracts and bids are stored consistently and access is appropriate.

BUILDING SAFETY

- ☐ Latest SIRS and applicable inspection reports are posted.
- ☐ Repair or remediation records are linked to the related inspection.
- ☐ Owners can tell which document is the latest approved version.

02 / TURN THE AUDIT INTO ACTION

Findings and follow-up

Record the gap, assign one owner, and set a due date. A short list that gets finished is more useful than a perfect audit that sits untouched.

GAP OR UPDATE NEEDED	DOCUMENT OWNER	DUE DATE	DONE	NOTES

A / BEFORE YOU CLOSE THE AUDIT

- ☐ Retest every corrected link from an owner account.
- ☐ Archive superseded documents without hiding the current version.
- ☐ Record the next quarterly review date and responsible person.
- ☐ Confirm requirements with the current DBPR guidance and association counsel.

B / FIND THE RIGHT LOCAL EXPERTISE

BHA Associate Members include community association law firms, property management companies, technology providers, engineers, reserve specialists, and other condominium professionals.

brickellhomeowners.org | Associate Members

Educational checklist only. Confirm the records required for your association under current law and governing documents.