

Process Checklist for NEW RENTER Address _____

Name _____ Tenancy start date _____ Rent S _____

- Check & File ID _____ Intro Form _____ Application _____ References _____
- Cancelled Power (if in owners name)
- Pre-entry inspection (IE Departed tenants' final inspection)
- Agreed start date _____
- Enter phone no. in phone contacts
- Create new folder to hold tenant's files
- Complete & print Tenancy Agreement
- Complete & print Guarantor Form (if needed)
- Print Bank AP form (if needed)
- Print New Tenant Brochure
- Save new Diary Document in tenant's folder
- Save new Rent Assessment record & File in tenants folder
- Save Photo ID & file in tenants folder
- Phone for meeting appointment
- Bond & Rent banked

At Meeting *****

- Sign Application
- " Agreement
- " Guarantor (if arranged)
- " Completed pre-entry inspection cklst
- Keys handed over (Number of keys)
- Discuss Brochure, Law, Refs, Problems, Etc.
- Other _____

After Meeting *****

- Copy / Scan / Save tenancy agreement in tenant's folder
- Copy / Scan / Save Bank AP form & file in tenant's folder (if used)
- Agreement copy given to tenant
- Advise failed applicants
- Diary first rent review date
- Cancel Adds
- Bond Lodged BN _____ Receipt No _____
- File bond acknowledgement letter/email
- File Email address
- Other