Tenant Onboarding Checklist

A tenant onboarding checklist is a comprehensive list of tasks and required documents that property managers follow during the tenant move-in process. It provides a step-by-step guide to ensure every action, such as verifying payments, conducting property inspections, setting up utilities, and delivering keys, is completed in the right order and within legal requirements.

Lease Agreement Terms

- [ ] State the rent amount and clearly outline the payment schedule.

- [ ] Specify the lease duration and renewal or termination options.

- [ ] Include rent increase clauses with notice periods.

- [ ] Define late payment penalties and grace periods.

- [ ] Detail security deposit conditions for collection, holding, and return.

- [ ] Describe maintenance obligations for both the tenant and the landlord.

Property Inspection

- [ ] Inspect appliances for safety and function.

- [ ] Check plumbing for leaks, drainage, and water pressure.

- [ ] Examine walls, ceilings, and floors for damage or wear.

- ☐ Test electrical systems and safety devices.

- ☐ Photograph each room with date stamps.

- ☐ Record all findings in a signed inspection report.

Payment Procedures

- ☐ List the rent amount and due date in the lease.

- ☐ Specify accepted payment methods such as bank transfer, check, or online portal.

- ☐ Outline late payment penalties and timelines.

- ☐ Provide receipts for all payments received.

- ☐ Keep accurate transaction records for legal and accounting purposes.

Community Guidelines

- ☐ Set noise level policies and quiet hours.

- ☐ Establish parking regulations and permit requirements.

- ☐ Define pet policies, including size, breed, and number limits.

- ☐ Outline rules for common area use and shared facilities.

- ☐ Specify consequences for violations and enforcement procedures.

Maintenance Instructions

- [ ] Assign tenant responsibilities such as lawn care or basic cleaning.
- [ ] Clarify landlord obligations for major repairs and replacements.
- [ ] Provide a process for submitting maintenance requests, including contact methods.
- [ ] Explain emergency repair procedures and response times.
- [ ] Require documentation for all repair requests.

Utility Setup

- [ ] Identify required utilities, including electricity, water, gas, and internet.
- [ ] Provide provider contact details for tenant setup.
- [ ] Arrange service activation dates before move-in.
- [ ] Communicate deposit and documentation requirements for each service.
- [ ] Verify activation before key handover.

Emergency Contact Information

- [ ] Provide direct contact information for the property manager.
- [ ] List emergency service providers like plumbers and electricians.
- [ ] Include after-hours contact options for urgent repairs.

☐ Outline the procedure for reporting emergencies.

Communication Plan

☐ Confirm tenant contact information for updates and notices.

☐ Explain the maintenance request protocol and response times.

☐ Provide emergency communication procedures for urgent issues.

☐ Clarify the channel for lease-related questions or changes.