

Property Hand Over – Agent to Tenant Procedure

Purpose of the Procedure

To ensure that all statutory requirements are complied with. To ensure every Tenancy is commenced with minimal stress to the Lessor Client, the Tenant and the Agency.

Notes

Reference is made in this procedure to the use of a Entry & Exit Condition reports outstanding folder. This folder should be used by Property Manager to follow up the return of Entry Condition Reports from Tenants.

This procedure is based on access to the following:

- Property Management software that has a computerised diary facility attached to the properties under management. If no computerised diary facility is available, action steps and conversations should be recorded in the relevant paper based files.
- The timing of the various action steps in this procedure is based on QLD Residential Tenancy legislation.
- There are references in this procedure to specific staff members in relation to specific activities. In some agencies, these roles may be performed by another member of staff or the title may be different.

Property Hand Over – Agent to Tenant Policies

1. Unless prior approval has been given by the Department Manager, no Tenancy Agreement is to be signed by a new Tenant while the property is still occupied by the Lessor Client or a current Tenant.
2. Property Managers must guide the new Tenant through the sign-up process ensuring that they fully understand what they are signing.
3. Property Managers must not issue keys prior to the signing of tenancy documents, start date of the lease and the collection of all monies due.
4. Rental Bonds are always the maximum permitted by legislation unless the Lessor Client instructs otherwise..
5. Bond transfers are to be dealt with on the following basis:
 - i. Outward Bond transfers must be first approved by the Department Manager
 - ii. Inward Bond transfers may be accepted.
6. All Tenants must sign the General Tenancy Agreement, or at least view the terms and conditions they will be subject to, and pay the bond as soon as possible after confirmation of application approval (however keep in mind point 1 above)
7. Any Special Terms must be provided in writing by the Lessor Client or drafted by a lawyer. These must have been provided to the tenant prior to accepting their application for the property.
8. Any alterations to the Tenancy Agreement must be initialled by all Tenants and the Property Manager (signing on behalf of the Lessor Client). All tenants must initial on every page of the Tenancy Agreement.
9. All signatures on the Tenancy Agreement must be witnessed by an Agency employee, who is not signing the agreement on behalf of the Lessor Client.
10. Each Tenant named on the Tenancy Agreement must be issued with a set of keys.
11. A master set of keys must be held in the office.
12. Only a Property Manager or Department Manager can sign a Tenancy Agreement on behalf of the Lessor Client.
13. Email, is the preferred form of communication (unless specifically instructed otherwise).
14. Where there is a reference made to the use of a particular letter to a Lessor Client or Tenant in the following procedure, it is possible to be replaced or used in conjunction with a phone call or email. Providing the date, contents of the call/email and the Lessor Client or Tenant's responses are clearly recorded in either the "Lessor Client" or "Tenant" section on the computer (whichever is appropriate).
15. All documentation sent or received in relation to a managed property is to be dated (received or sent) and filed appropriately (soft copy preferred).
16. All actions and/or communications in relation to a managed property are to be recorded in the appropriate section of the computer. The date, details and people involved are to be recorded.
17. QLD legislative and Management Agency Agreement requirements must be met at all times.
18. All Agency partners must act in the best interests of the Lessor Client at all times.
19. Any variation that is required to the approved Agency Policies and Procedures must be approved by the Department Manager.
20. Standard Agency checklists, letters and forms are to be used and updated at all times.

Documents used in this Procedure

Forms

Property Handover Checklist	Form24
Document/Key Receipt	Form4

Letters

Tenant Welcome Pack – Advising Strata	LG4
Agent to Tenant - Signed Agreement	LL17
Renewal & Rent Review – Advising That Agreement Signed	LL48

Procedure Steps

Step 1. Tenant Welcomed to the Agency

Performed By: Front Office Manager

Task Details

Forms and Letters used in this step: [Form24](#)

- 1.1 The Tenant/s are greeted and shown to the Agreement signing area.
- 1.2 The General Tenancy Agreement is provided to the Tenant for review prior to signing.

Step 2. General Tenancy Agreement Explained

Performed By: Property Manager

Task Details

- 2.1 When the Tenant has finished reviewing the documents, explain the following areas of the Agreement to the tenant in detail:
 - The Tenancy Schedule of the Agreement
 - Ending the Tenancy (explain notice periods)
 - The rent payment requirements are explained to the Tenant.

Step 3. General Tenancy Agreement Executed

Performed By: Property Manager

Task Details

- 3.1 Answer all of the Tenant's questions.
- 3.2 All copies of the Tenancy documentation are signed by the Tenant and the Agency representative:
 - initial where any of the standard printing in the Agreement has been altered
 - initial (tenant) the bottom of each page of the General Tenancy Agreement
 - sign in the appropriate places on the Tenancy Schedule
 - sign the Special/ Additional Conditions.

Step 4. Entry Condition Report Issued/Explained

Performed By: Property Manager

Task Details

- 4.1 The importance of the Entry Condition Report is explained to the Tenant:
- The Rental Bond refund is determined by the accuracy of this report
 - The report must be completed, signed and returned within 3 days to the Agency.
- If
- not, the Agent's report may be deemed true and correct.
- 4.2 One copy of the Entry Condition Report is given to the Tenant to complete
- This is to be returned signed/amended within 3 calendar days, a photocopy will be made for the tenant's records.

Step 5. Rental Bond Lodgement Form

Performed By: Property Manager

Task Details

- 5.1 The Rental Bond Lodgement Form is explained to the Tenant.
- 5.2 All parties sign and date the form where required.
- 5.3 Two photocopies are made of the signed Rental Bond Lodgement Form.
- 5.4 The Tenant is provided with a signed copy of the Form.
- 5.5 The Agency retains a copy of the Form, with the Tenancy Agreement.
- 5.6 The original Bond Lodgement Form is to be lodged with the Bond payment.

Step 6. Information statement & copy of applicable by-laws

Performed By: Property Manager

Task Details

- 6.1 The Tenant is provided with a copy of the information statement.
- 6.2 The 'Information Statement' is explained to the Tenant.

Step 7. Explain All Other Agency Documents

Performed By: Property Manager

Task Details

- 7.1 Each document is explained to the Tenant.

- 7.2 Where certain documents are available “Online”, this is explained and the Tenant is shown how to access and use the documents.

Step 8. Collect And Receipt All Money Due

Performed By: Property Manager

Task Details

- 8.1 Collect and receipt all money owing to the Agency Trust Account:
 - Rental Bond
 - Rent in advance
- 8.2 Provide the Tenant with a receipt, reflecting the allocation of all monies received.

Step 9. Keys/Documents Signed Over

Performed By: Property Manager

Task Details

Forms and Letters used in this step: [Form4](#)

- 9.1 All keys must be photocopied on to the Document/Key Receipt Form.
- 9.2 Include details of any remote controls, alarm codes, etc.
- 9.3 The Tenant signs the Document/Key Receipt Form.
- 9.4 Photocopy the signed Document/Key Receipt Form, and provide a copy to the Tenant. The original is retained for the Agency file.
- 9.5 The Tenant is issued with their copy of the executed General Tenancy Agreement and any other Agency documents.
- 9.6 Where the Tenant is moving into the property immediately:
 - Issue one full set of keys for each person named on the Agreement.
- 9.7 Where the Tenant is moving into the property at a future date:
 - Arrangements are made for the collection of the keys on the day the Agreement commences.

Note: The Tenant is to sign for the keys when issued, however if they are receiving any documentation prior, they are required to sign for the documents now.

Step 10. Tenant Congratulated And Farewelled

Performed By: Property Manager

Task Details

- 10.1 The Tenant is asked to join the Agency mailing list.
- 10.2 The Tenant is congratulated and then farewelled.

Step 11. Documentation Processed

Performed By: Property Manager

Task Details

- 11.1 The Rental Bond Lodgement Form is filed in the "Bonds to be Lodged" tray.
- 11.2 Photocopy the Entry Condition Report.
- 11.3 File all documents, except the Lessor copy of the Tenancy Agreement and copy of the Entry Condition Report.
- 11.4 Confirm the Periodic Inspection date has been entered into the system for three months time.

Step 12. Lessor Advised

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LG4](#), [LL17](#), [LL48](#)

- 12.1 The Lessor is advised that the General Tenancy Agreement has been signed.
- 12.2 The Lessor is sent a copy of the General Tenancy Agreement and a copy of the Entry Condition Report.

Audit Check List - Property Hand Over – Agent to Tenant Procedure

Date of Audit:

Person conducting Audit:

Reason for Audit:

The following Documents were checked as part of this Audit:

Document Name	Number	Comments

The following other materials/aspects of this Procedure were checked as part of this Audit:

Details	Comments

Step	Result
1 - Tenant Welcomed to the Agency	<input type="checkbox"/>
2 – General Tenancy Agreement Explained	<input type="checkbox"/>
3 – General Tenancy Agreement Executed	<input type="checkbox"/>
4 – Entry Condition Report Issued/Explained	<input type="checkbox"/>
5 - Rental Bond Lodgement Form	<input type="checkbox"/>
6 – Information Statement explained	<input type="checkbox"/>
7 - Explain All Other Agency Documents	<input type="checkbox"/>
8 - Collect And Receipt All Money Due	<input type="checkbox"/>
9 - Keys/Documents Signed Over	<input type="checkbox"/>
10 - Tenant Congratulated And Farewelled	<input type="checkbox"/>
11 - Documentation Processed	<input type="checkbox"/>

12 - Lessor Advised	<input type="checkbox"/>
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