

New Tenant Onboarding Checklist For Property Management

 Show only Checklist

Display Style
Default 

Pre-Move-In Preparation

Tasks to complete before the tenant moves in, ensuring the property is ready.

Scheduled Cleaning Completion Date

Enter date...

Notes on Property Condition (Pre-Cleaning)

Write something...



HVAC Filter Replacement?

- Yes
- No

Smoke Detector Testing Complete?

- Yes
- No

Number of Keys to Prepare

Enter a number...

Pre-Move-In Photos

 Upload File

Pest Control Treatment Scheduled?

- Yes
- No

Lease Agreement & Paperwork

Verification of signed lease documents and collection of necessary paperwork.

Tenant Signature on Lease Agreement

Copy of Signed Lease Agreement

 Upload File

Lease Type

- Standard Lease
- Month-to-Month Lease
- Fixed-Term Lease

Lease Start Date

Enter date...

Security Deposit Amount

Enter a number...

Addendums Signed?

- Pet Addendum
- Smoking Addendum
- Parking Addendum

Tenant Full Name

Write something...

Property Access & Keys

Distribution of keys, security codes, and instructions for property access.

Key Handover Date

Write something...

Key Holder Name (if applicable)

Write something...

Lockbox Code (if applicable)

Write something...

Key Delivery Method

- In-Person
- Mail
- Lockbox
- Other

Number of Keys Provided

Enter a number...

Key Types Provided

- Front Door Key
- Back Door Key
- Garage Door Opener
- Mailbox Key
- Pool Gate Key

Key Receipt Acknowledgement (Tenant)

Utilities & Services

Confirmation of utility transfers and setting up necessary services.

Utility Provider - Electricity

- Provider A
- Provider B
- Provider C
- Other

Account Number - Electricity

Enter a number...

Utility Provider - Water

- Provider A
- Provider B
- Provider C
- Municipal

Account Number - Water

Enter a number...

Utility Provider - Gas (if applicable)

- Provider A
- Provider B
- None
- Other

Account Number - Gas (if applicable)

Enter a number...

Utility Transfer Date

Enter date...

Welcome & Property Orientation

Providing a welcome package and familiarizing the tenant with the property's features and rules.

Welcome Letter/Message

Write something...

Provided Orientation Materials (Check all that apply)

- Community Rules
- Parking Information
- Emergency Procedures
- Maintenance Request Form
- Pet Policy (if applicable)

Brief Property Walkthrough Notes

Write something...

Explanation of HVAC System

- Explained thoroughly
- Briefly explained
- Not discussed

Scheduled Follow-Up Date

Orientation Start Time

Emergency Contact Information

Providing essential emergency contact details and procedures.

Police Department Phone Number

Fire Department Phone Number

Ambulance Phone Number

Property Manager Contact Name

Write something...

Property Manager Phone Number

Write something...

Maintenance Contact Name

Write something...

Maintenance Contact Phone Number

Write something...

Emergency Procedures Summary

Write something...

Follow-Up & Feedback

Checking in with the tenant post-move-in to address any concerns and gather feedback.

Follow-Up Date (1 Week Post Move-In)

Enter date...

Tenant Satisfied with Move-In?

Yes

No

Neutral

Tenant Comments/Concerns

Write something...

Property Condition Score (1-5)

Enter a number...

Were all promised repairs completed?

Yes

No

N/A

Notes on Follow-Up Actions

Write something...