

Property Management Onboarding Checklist

For education only — consult local counsel before using any lease terms.

Before Move-In

- Screening criteria (income 3× rent, background/credit, rental history).
- Application workflow (forms, screening, acceptance/denial notices).
- Lease templates + state addendums; fair housing compliance.
- Utilities responsibilities; meter reads; transfer setup.
- Insurance: renters insurance requirement; landlord policy review.
- Pre-move-in checklist: keys, detectors, safety items, photo/video baseline.

Rent Collection & Communication

- Payment portal, due date, grace period, late fee policy.
- Maintenance request channel + response SLAs.
- Emergency contact procedure (24/7).
- Notice templates: entry, rent increase, violation, non-renewal.

Turnover & Repairs

- Vendor list with W-9/insurance; scope process.
- Standard paint/flooring specs (durable, easy-clean).
- Move-out inspection checklist; deposit accounting timeline.
- Capital reserve plan for roof/HVAC/plumbing.

Records & Compliance

- Accounting setup (categories, separate accounts).
- Local license/registration; disclosures (e.g., lead paint if applicable).
- File retention for leases, addendums, inspections, communications.