

New Tenant Move In Checklist -

Tenant(s) Name: _____ Date Received: «Packet Received Date»

Address: «Property Address» Available as of: «Date available 4 rent»

INITIAL SET UP (Leasing)	
Contact Owner/Tenant for showing schedule: _____	Update "Showing" email script: _____
Email PM to review property description and rent: _____	If Vacant, Add to Appointments Plus: _____
Update Video from Youtube to PW: _____	Email property that is listed Owner: _____ PM: _____
Update/Publish in PW: ____ Craigslist _____	Add to Excel "Property Listing" Report: _____
Rentandbuyahome ____	Get average utility costs: (Check Owner Questionnaire)
List property on Rental Board: _____	Gas: _____ Elect: _____ Water: _____
APPROVAL PROCESS (Leasing)	
Set up/Update E-Folder on server: _____	Take off: PW ____ Craigslist _____
Email Mgr App Review and Screening results: _____	Rentandbuyahome ____ Appt-Plus: _____
Create on-line lease packet and email to tenant: _____	Remove from Excel "Property Listing": _____
Email Approval to Tenant & CC Tenant Services: _____	Save signed lease to E-Folder on server: _____
Current Tenant Notified: _____	Email PM & Owner "Notice of Signed Lease": _____
	Give File to Tenant Services: _____
POST LEASE SIGNING (Tenant Services)	
Set up Tnt in PropertyWare: _____ Activate Portal: _____	Copy lease and publish in PW, 1 st Pg in File: _____
Review/Update Tnt Summary & Ledger in PW: _____	Update Lawn/Snow Excel list & Notify Vendor: _____
Make work order for re-keying locks: _____	Update Calendar to remove from Lawn/Snow list: _____
Make Label for tenant file: _____	Start City license process and update PW: _____
Email "New Tenant Move In Info" to Tenant: _____	Change "Charge Mgmt Fee" to YES: _____
Get Move-In Inspection and email to tenant using "Move In Condition Report" template in PW): _____	Review Lease with Tenant: _____
Publish to Tenant and Owner portals: _____	Schedule email for follow-up 1 week of move in: _____
Schedule Final Turnover Checklist Inspection: _____	Log "Waiting For" Utilities Transfer form from Tenant: _____
If Mpls property publish 311 Poster to tnt portal: _____	Gas _____ Elec _____ Water _____
Update Move-in/Out Excel Progress Log: _____	Log "Waiting For" Locks Rekeyed I.B Returned: _____
	Update PW Tnt Custom Field any MI concessions _____
Dave	
Lease Commission: ____%. Discount: ____% = \$ _____ Lease Log Updates: _____ Showing Credit: _____	

MOVE-OUT CHECKLIST

Name: «Tenant names» Address: «Property Address»

Move-In Date: «Start date» Move-out Date: «Move out date» Notice rec'd: «Notice Recvd»

Proper Notice?: «Proper Notice» Lease end date: «End date» Actual Vacate Date: _____

INITIAL TASKS - Tenant Services

- Email Christine to send "Move Out Notice to Owner"
- Create move out packet/Showing Folder
- Give Pre-move-out inspection and WO to Maintenance
- E-mail "Move-Out Rcvd to Tenant" and cc Leasing
- Attach MO notice to Tnt Lease under "Notes & Documents" in PW
- List property on Move-in/Move-Out Termination log
- Update "Additional Dates" in Tenant Lease Summary in PW
- Put "Tenant Move Out Follow Up Checklist" in Suspense
- Put this checklist & "Tenant Charges" in MO Binder
- Call water dept for balance: \$ _____
- Call tnt if delinquent _____

PROPERTY MANAGER

- Email "Pre Move-Out Owner Notice" with Pre-Move Eval
- Withhold Owner Draw in PW in needed
- List re-lease fee if improper notice in the description section in the tenant summary in PW and on Tenant charge form
- Check if owner has deposit and discuss options

MOVE OUT - Tenant Services

- Update Actual Vacate date in PW
- Update vacancy list if not rented
- Get tenant charge sheet and invoice amounts
- Give tenant folder/Checklist to Dave
- Change Mgmt Fee in Property Window to \$75 if vacant

ACCOUNTING

- Verify Property is listed on Security Deposit Log
- Get copy of final water bill. Amt: _____ As of: _____
- transfer utilities if not rented: Owner C/O RP
- Print out photos of damage to be sent to tenant with notice
- Cut Showing Credit Check (Deposit into sec Dep Acct)
- If there is a showing credit Click RED Move Out bottom upper right. If not, skip to next.
 - Calculate Interest _____
- Enter any showing credits
 - Create One Time Charge
 - Acct: 2250
 - Comments: Showing Credit
 - Record Payment – apply payment to charge just created
 - Click New Payment and apply against charge (Showing Cr check gets deposited into Sec Dep Acct)
 - Check lease summary description for special notes
- Go to tenant ledger and delete any rent and late fee posted after move-out date
- Enter All tenant charges as separate charges all to acct 4600
 - Comments: One line explanation of what charge is for
- Click RED Move Out bottom upper right
 - If Reason for leasing is know, enter it
 - Calculate Interest _____ (Input amount from step 2 if done). Rate is 1% compounded yearly
- Disable Portal Access in check box in upper right
- Total Sec. Deposit should equal deposit held plus any showing credit plus interest
- Under Security Deposit Refund - SECDEP Held for Unpaid Charges should total all charges
- Security Deposit Remaining will be the amount to be refunded. Keep as Refund
- Pay Refunds From Account 1000 Owners Trust or 1025 Damar
- Refund Payee Name change to All Tenants On Lease
- Refund Check To Be Printed Box if Tnt gets check
- Under Funds Transfer – Transfer out of Default Sec Dep Acct should be set to "Transfer Set Amount" and the Transfer amount equals "Security Deposit Collected" in upper left including any showing Credit
- Transfer from Account is the Security Dep Acct (1050 for trust properties, 1060 for Damar)
- Transfer Funds Method -- Journal Entry
- Enter Forwarding Address if not already updated
- Click Save
- Back to Tenant Ledger, Click Mail Merge and print the Moveout Calculation report (2 copies -for tenant and file)
- Attach Moveout Calculation report to lease
- Go to Money Out/Print Checks and print the checks
- Print GL in PW for property for Dep and Liability accts
- Make sure they total. Print copy for tenant file
- Pay outstanding water bill if applicable
- Update Security Deposit Disposition Log
- Dave to do online transfer from Deposit Acct to Trust Acct