

Checklist Directory and Descriptions

Note: All Checklists are in Microsoft Word® using Tables. There are specific instructions on Tables in the PDF Manual

1. Business Overview Checklist

This covers important functions that should be part of any business, such as policy and procedures manual, employee handbooks, mission statement, software, and more.

2. Property Management Overview Checklist,

The Property Management Organization reviews basic operations in the property management office.

3. Property Management Compliance Checklist

- It is too easy to forget the important federal and state laws and guidelines that govern the property management business in day-to-day activities, such as Fair Housing, RESPA, Antitrust, and more.

4. Company Personnel Checklist

This covers all employee files, procedures, and documents, such as employee contract, information forms, reviews, files, etc.

5. Owner Organization Checklist

This reviews procedures and documents relating to owners such as owner checklists, management agreements, letters, compliance forms, ACH, etc.

6. Tenant Organization Checklist

This reviews tenant procedures and documents that could be appropriate for your property management office, such as policies, procedures, rental agreements, addendums, tenant letters, applications, and more.

7. Vendor Organization Checklist

This reviews vendor procedures, files, and vendors documents.

8. Management Inquiry Checklist

Be ready when someone calls to inquire about management. Take down the information quickly and be ready to ask the right questions

9. Management Package Checklist

Here is a great checklist that puts together a great management package. This is a consistent way to get the job done – without forgetting all the details.

10. New Client/Owner Checklist

This helps keep all the myriad of details in order when you receive a new client for management.

11. New Property/Tenant Checklist

Another great form for tracking all the annoying details for taking on new properties and tenants – You can expand this as much as you want.

12. New Property/Maintenance Checklist

Another great form for tracking all the pesky details for taking on more maintenance – you can expand this as much as you want.

13. Rent-up Only Checklist
Even if you only have the property on a short-term basis, consistency can keep you out of trouble with the owner.
14. Tenant Application Checklist
This helps to check that you have all the information to process an application in a timely manner.
15. Tenant Move In Checklist
This is one area where you can miss many “details” and the “fires” escalate. This also keeps the process consistent.
16. Renew Lease/Rental Agreement Checklist
Renewing a lease or rental agreement needs to be done properly and this form keeps track of all the details.
17. Add/Remove Tenant
Keep track of those tenants who move in or out but leave their co-occupants.
18. Add/Remove Pet
Keep on top of pets in the property and keep your records with the owner to avoid any legal situations.
19. Drive-by checklist
This is a handy form for when you drive by the property, whether scheduled or not. Keep them in your car so you can record what you see.
20. Tenant Violation Checklist
There is always some tenant violation and this helps keep track of it in an orderly manner
21. Lead-Based Paint Repair Checklist
Lead-based paint repairs are high-risk and repairs that you must do properly.
22. Mold Problem Checklist
Mold is the highest risk problem today – this checklist helps to handle them expediently until the situation is resolve.
23. Annual Property Survey Checklist
This form moves you quickly through the property to notate all conditions and/or damage.
24. Tenant Move Out Checklist
Stay in tune with Fair Housing when you have the same move out procedures with all tenants.
This keeps track of all the details
25. Security Deposit Refund Checklist
This is another high-risk area. Most states have time limits on when you can issue deposits to the tenant. Keep track of the time with this checklist.
26. Unlawful Detainer Checklist
It is easier to deal with this unhappy situation when you have a consistent checklist.
27. Client/Owner Termination Checklist
Client relations end or deteriorate. It becomes critical to handle the ending in a professional manner.

28. Property/Tenant Termination Checklist
Tie up the loose ends when it is time to end the management of the property and the tenancy.
29. Fair Housing Complaint Checklist
Be ready for those unexpected complaints. Handle it professionally and have a consistent procedure.
30. Supply List Checklist
Everyone is unhappy when those needed supplies run out – keep track with this checklist – involve all the personnel to help.
31. Personnel Checklist,
Many Broker/Owners do not keep adequate personnel records. Start with this checklist and it will simplify the process.
32. Vendor Checklist
Vendors need tracking just as much as your personnel do. This way you know if you have the right records on your contractors.
33. Insurance Checklist
This is one area where it is easy to miss important renewals. Keep records that you retrieved and review easily.
34. Office Inventory Checklist
Keep track of your furniture and equipment with this list.
35. Software Checklist
Do you have your serial numbers and warranties organized – if not, use this handy checklist.
36. Required Poster Checklist
Just another to-do item – but can get you in trouble if not handled properly. This checklist makes it easy.
37. Trust Account Audit Checklist
An audit can cause panic but it is easy to handle professionally by reviewing necessary records and assigning tasks to the appropriate personnel
38. Year-end Checklist
It is easy to lose track of something that happens yearly and when the year ends, it is a busy time – put these items on your calendar.
39. Office Vacation Checklist
Planning a vacation takes work – this will help it go more smoothly.
40. Personal Vacation Checklist
It is important to plan your personal vacation items just as carefully as your work. Fill this out and have peace of mind when you leave.