

Best Practice Real Estate

Annual Leave Handover Checklist



Name: _____ Leave Duration: _____

Last Day: _____ Return Date: _____

Division: _____

Passwords:	Computer	PM Trust Software	Mobile Phone
	User: _____	User: _____	User: _____
	P/W: _____	P/W: _____	P/W: _____

1./ Checklist of To Do's for the Handover:

Yes	No	Date	Initials		Notes
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ Write the out of office phone message - in accordance with Company Policy - the out of office phone message should be put on each night	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Changed Voicemail message - explaining that the Temp / other Staff will be covering the role for the specific dates	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Process any Owner Deduction forms for properties that have been rented and forms not completed	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ Provided passwords / access for Staff covering the person on leave	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	e./ Cleared out all active emails - responded to urgent emails - created a list of emails that the Temp / other Staff need to address	

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1./ Checklist of To Do's for the Handover: (Cont.)

Yes	No	Date	Initials		Notes
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>f./ Set out tasks for the Leasing Consultant to follow up during the leave</i>	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>g./ All mail has been opened and processed - nothing left unattended</i>	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>h./ Ensure that all bills that are awaiting approval are approved and entered</i>	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>i./ Shown the Temp how to use the telephones</i>	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>j./ Cleaned the desk, and made notes on any files, documents, or actions that need to be completed by the Temp</i>	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	<i>k./ Replaced all keys from the desk, car and shown the Temp where keys are located and the Key Log process - refer them to the Written Procedure</i>	

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2./ Leasing Consultant:

Yes	No	Date	Initials	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ Meeting with Leasing Consultant took place
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ It is important that the Leasing Consultant has a detailed list that has been prepared (handover) for what they need to do during the leave period
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ It is important that the Senior Manager has met with the Leasing Consultant for a briefing
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ The Temp should sit in on the briefing meeting with the Leasing Consultant and the Manager

Notes

3./ Opens Booked:

Yes	No	Date	Initials	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ Review all current Opens that have been scheduled (Midweek & Saturday) - check they are entered correctly online, notices sent to Renters, keys available, and they have been entered into the calendar correctly
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Provide the Temp feedback on each of the Opens that have been booked for the week - access, property types, Renters, issues, availability, Move In / Move Out Restrictions, advertised price

Notes

3./ Opens Booked: (Cont.)

Yes **No** **Date** **Initials**

___/___/___ ___

c./ Show the Temp the OFI Calendar - explain how the Opens are recorded in the calendar

Notes

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4./ Internet Listings & Rental List:

Yes **No** **Date** **Initials**

___/___/___ ___

a./ Number of properties advertised for the Portfolio

Notes

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___/___/___ ___

b./ Show the Temp the Rental List of available properties - the ones that they will be responsible for during the leave period

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___/___/___ ___

c./ Explain to the Temp the process of who is responsible for the Internet Listings and who make the changes & how

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___/___/___ ___

d./ The Temp is required to personally telephone EVERY Rental Provider that has a vacant property or an Internet Listing to provide feedback - explain when this is to occur and forewarn them of any difficult RRP's

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___/___/___ ___

e./ Explain to Temp the policy of calling every Rental Provider (Monday) with the feedback from Opens

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5./ Appointments:

Yes No Date Initials

___/___/___ ___ a./ Number of appointments already booked

___/___/___ ___ b./ What appointments have been booked that the Temp needs to cover

___/___/___ ___ c./ Give an overview on how the Temp needs to cover off any appointments

Notes

6./ New Renter Inductions / New Tenancies:

Yes No Date Initials

___/___/___ ___ a./ How many Inductions are booked?

___/___/___ ___ b./ How many Renter Inductions are booked in the calendar during the leave period?

___/___/___ ___ c./ Explain to the Temp how to book an induction in the diary, and the process to follow to correctly induct a new Renter and prepare the property for a new Tenancy

Notes

7./ Arrears:

Yes	No	Date	Initials		Notes
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ Number of properties 3+ days in arrears	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Provide an overview of EVERY property that is in arrears at the moment, and go through the notes in the system - explain how & where to record the notes	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Provide an overview of what the Company's Arrears Policy & Expectation is - and what steps are to be followed	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ Detail any notes of properties that may fall beyond 14 days in arrears during the period of Annual Leave - what is the strategy	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	e./ Show the Temp where to record the call log / communication to the Rental Provider informing them of the arrears	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	f./ Show the Temp how to use the SMS for arrears	

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8./ Notice To Vacate:

Yes	No	Date	Initials	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ How many NTV's were received - yet to be processed?
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Explain what the process of an NTV is and what is to happen with booking the inspections in the PM Trust Software
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Explain to the Temp the process to follow when they do receive a NTV during the Annual Leave Period: e.g. Sales Appraisal, Market Assessment, Maintenance, Advertising review, Audit Current Authorities, Disclosure Statement & Rental Minimum Standards, etc. - refer them to the Written Procedure
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ Explain to the Temp the process to conduct a Pre-Vacate Inspection, and where to log the notes, prior to placing the property online - refer them to the Written Procedure

Notes

9./ Break Lease:

Yes	No	Date	Initials	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ How many of the Internet Listings are Break Lease?
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Go through the process of a Break Lease with the Temp
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Highlight which of the properties that are on the Rental List are Break Lease

Notes

10./ Vacates:

Yes No Date Initials

___/___/___ ___

a./ *How many vacates will occur during the leave period?*

___/___/___ ___

b./ *Go through the diary and show what vacates have been booked during the leave period*

___/___/___ ___

c./ *Review if there are any Renters moving in during the leave period to a property that is vacating*

___/___/___ ___

d./ *Explain which trades will require access, which dates, and whether RRP approval has been granted - refer back to the notes in the PM system, and place the dates in the calendar*

___/___/___ ___

e./ *Is there a diary appointment for the days when keys are to be returned for each vacate? - is it in the calendar?*

Notes

11./ Vacant Properties:

Yes No Date Initials

___/___/___ ___

a./ *How many properties are currently vacant?*

Notes

11./ Vacant Properties: (Cont.)

Yes	No	Date	Initials
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___

b./ Discuss any possible strategies for rent reductions during the leave period

<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___
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c./ How many properties have been vacant for 14 days or greater? Highlight any potential risks that may lead to a Management Transfer - may need to involve another Senior Manager to assist with RRP communication

Notes

12./ Lease Renewals:

Yes	No	Date	Initials
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___

a./ How many Lease Renewals are scheduled to be actioned during the leave period?

<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___
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b./ Explain to the Temp where to find the Lease Renewal report in PM Trust Software

<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___
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c./ Explain to the Temp the Procedure to follow to complete a Lease Renewal - refer them to the Written Procedure

Notes

13./ Periodic Routines & 3 Month Inspections:

Yes	No	Date	Initials
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___

a./ How many Periodic Routines & 3 Months Inspections are scheduled during the leave period?

Notes

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13./ Routines: (Cont.)

Yes	No	Date	Initials		Notes
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Explain to the Temp where they find the routine report in PM Trust Software	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Refer to the diary appointments for any routines that have been booked and Renters Notified during the leave period	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ Provide a Demonstration to the Temp on which letter needs to be sent to the Rental Provider to invite them or a Representative to the Routine	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	e./ Provide a Demonstration to the Temp on which letter needs to be sent to the Renter to inform them of the Routine, and any checklists that needs to be included	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	f./ Identify from the scheduled Routines, which of the properties that the Temp needs to send out Letters to RRP's & Renters, and book routines during the leave period, for dates after you return	

14./ Problem Renters:

Yes	No	Date	Initials		Notes
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ How many problem Renters are there that need to be addressed?	

14./ Problem Renters: (Cont.)

Yes No Date Initials

___/___/___ ___

b./ Give an overview of any Renters that have immediate issues that are being addressed

Notes

15./ Nervous Rental Providers:

Yes No Date Initials

___/___/___ ___

a./ How many nervous Rental Providers are there that need special attention?

Notes

___/___/___ ___

b./ Give an overview of any Rental Providers that need special treatment - vacant properties - rental issues

Notes

16./ VCAT / Magistrates Court:

Yes No Date Initials

___/___/___ ___

a./ Are there any VCAT / Magistrates Court cases pending during the leave period?

Notes

___/___/___ ___

b./ Give an overview of any VCAT / Magistrates Court hearings that are booked

Notes

16./ VCAT / Magistrates Court: (Cont.)

Yes No Date Initials

___/___/___ ___

c./ If there is a VCAT / Magistrates Court hearing scheduled - who is attending, and has the file been prepared?

Notes

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17./ Insurance Claims:

Yes No Date Initials

___/___/___ ___

a./ Are there any insurance claims that are pending?

Notes

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___/___/___ ___

b./ Give an overview of any insurance claims that are in place at the moment

Notes

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18./ Ongoing Maintenance Issues:

Yes No Date Initials

___/___/___ ___

a./ Current Maintenance Tasks awaiting quotes

Notes

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___/___/___ ___

b./ Show the Temp how to find the Ongoing Maintenance Task that you are currently working on

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18./ Ongoing Maintenance Issues: (Cont.)

Yes	No	Date	Initials	
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Show the Temp where to find the list of Trade Creditors in PM Trust Software
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	d./ Show the Temp where any of your requests for Quotes are located in PM Trust Software
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	e./ Outline which properties have maintenance / works being undertaken during the leave period
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	f./ Outline to the Temp the process for providing keys to the Tradespeople

Notes

19./ Property Compliance:

<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	a./ Review the scheduled Renewals (during the leave period) that need to be managed for Smoke Alarm Compliance, Gas & Electrical Inspections, and Pool Barrier Inspections - what actions need to take place - refer them to the Written Procedure
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	b./ Provide the Temp a list of New Tasks for Smoke Alarm, Gas, Electrical & Pool Compliance that need to be initiated - refer them to the Written Procedure
<input type="checkbox"/>	<input type="checkbox"/>	___/___/___	___	c./ Create a list of Rental Providers that are managing the Compliance themselves, and the process for retrieving & storing Compliance Certificates
