

SITE SURVEY REPORT

Property management onboarding checklist

Prepared for	Property management onboarding checklist (fictional example) (fictional)
Date	9 Oct 2026
Site	Property management onboarding checklist (fictional example)
Prepared by	Example coordinator

FORM

Property management onboarding checklist**1. Management instruction**

Project or site	Example Site
Record reference	ONB-001
Record date	9 Oct 2026
Prepared by	Example coordinator
Property reference and address	Example Property P-10
Management start date	15 Oct 2026
Management authority or agreement reference	Example management instruction MI-10
Responsible property manager	Example property manager

2. Records and access

Management scope and responsibilities confirmed	Confirmed
Existing property and tenancy records referenced	Exception
Existing property and tenancy records referenced exception or applicability note	Previous maintenance file has not yet been received.
Access arrangements and key handover referenced	Confirmed
Existing maintenance issues and suppliers reviewed	Confirmed
Condition inspection and inventory references	Condition report CI-10; inventory INV-10
Utility and account handover references	Utility handover UH-10

3. Handover actions

Missing records and next steps	Request outstanding maintenance file from outgoing manager.
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Record receipt and references rather than sensitive identity, banking or access details. Follow the organisation's secure handover process.

Record status	Open
Next action or reason none is needed	Review the recorded exception and retain the evidence.
Responsible person	Example supervisor
Reviewed by	Example reviewer
Reviewer acknowledgement	

Example reviewer