

Property management onboarding checklist

Record the transfer of a property into management, including authority references, records received, access arrangements and unresolved handover tasks.

Complete the applicable sections. An asterisk marks a required field when that section applies. Copy repeat sections as needed and attach photographs separately.

Management instruction

Project or site *

Record reference *

Record date *

Prepared by *

Property reference and address *

Management start date *

Management authority or agreement reference *

Responsible property manager *

Records and access

Management scope and responsibilities confirmed *

☐ Confirmed ☐ Exception ☐ Not applicable

Management scope and responsibilities confirmed exception or applicability note *

If applicable: Management scope and responsibilities confirmed is Exception or Management scope and responsibilities confirmed is Not applicable.

Existing property and tenancy records referenced *

☐ Confirmed ☐ Exception ☐ Not applicable

Existing property and tenancy records referenced exception or applicability note *

If applicable: Existing property and tenancy records referenced is Exception or Existing property and tenancy records referenced is Not applicable.

Access arrangements and key handover referenced *

☐ Confirmed ☐ Exception ☐ Not applicable

Access arrangements and key handover referenced exception or applicability note *

If applicable: Access arrangements and key handover referenced is Exception or Access arrangements and key handover referenced is Not applicable.

Existing maintenance issues and suppliers reviewed *

☐ Confirmed ☐ Exception ☐ Not applicable

Existing maintenance issues and suppliers reviewed exception or applicability note *

If applicable: Existing maintenance issues and suppliers reviewed is Exception or Existing maintenance issues and suppliers reviewed is Not applicable.

Condition inspection and inventory references

Utility and account handover references

Handover actions

Missing records and next steps *

Record receipt and references rather than sensitive identity, banking or access details. Follow the organisation’s secure handover process.

Record status *

☐ Open ☐ Complete

Next action or reason none is needed *

Responsible person *

Reviewed by

Reviewer acknowledgement

Signature: _____