

# CROSSVIEW

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## PROPERTY MANAGEMENT

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### *Onboarding Checklist for a new property*

#### **Step 1: Notify Mortgage Provider and Insurance Companies**

- Contact your mortgage provider to inform them about renting out the property and inquire about necessary changes.
- Review your insurance policy and enroll in landlord insurance for tenant-related damages as well as provide a copy to your designated property manager. The requirements for the policy coverage are outlined in the management agreement.
- Please be advised that some insurance companies will deny a claim if they are aware the homeowner no longer resides on the property.

#### **Step 2: Check Homeowners Association Rules on Leasing**

- *If applicable, review your homeowner's association's leasing rules. Arrange and pay for any leasing permits, which may be a requirement of the Homeowner Associations. Please be sure to share the rules with CVPM and we will provide a copy to all tenants.*

#### **Step 3: Thorough Cleaning Tip: *The better the condition the tenant gets the home, the better we can keep it!***

- **It is required to have your home professionally cleaned to ensure high cleanliness standards.**
- **All furniture and personal belongings are to be removed from the property.**
- **Carpets must be professionally cleaned prior to replacing a tenant.**
- **Pest control treatment can be coordinated by CVPM as needed.**
- **All services can be coordinated with your designated property manager if needed.**

#### **Step 4: Maintenance and Repairs**

- Holes and screws need to be filled, sanded, and touched up. Walls, doors, trim and baseboards should be cleaned and painted as needed.
- Ensure all light fixtures have working bulbs. Replace the air conditioning filter, and if necessary, install a new water filter. For water filters, leave them in the original packaging on the countertop or install them while keeping the packaging on the countertop. This guarantees accurate tenant guidance for future filter replacements.
- Check for missing door stops to prevent potential damage from doors hitting the wall after a tenant moves in.

- Check that all blinds are functioning properly and that all windows open and close properly.
- Window screens must be in good condition with no tears and replaced if missing.
- Check that all appliances and plumbing fixtures, garage door and all door locks/keys are working properly.

#### **Step 5: Rental Policies**

- Determine specific rental policies as they pertain to your property's needs, including rules on pets, courtesy items, etc. Have a detailed discussion with your property manager regarding these items.

#### **Step 6: Landscape Maintenance and Pool Requirements (if applicable)**

- Ensure the yard is well-maintained, including grass cutting, bush trimming, and weed removal if applicable. Additionally, mulching (including spreading) fertilization and application and exterior eradication of destructive organisms also determine if the landscaping services will be covered by the tenant or by yourself.
- If the property has an irrigation system, it needs to be cycled to make certain all zones and heads are working properly.
- Owners must maintain a professional licensed bonded pool service if the Property has a pool. Fair Housing Laws prohibit us from requiring a tenant to sign any type of liability waiver or deny families with children rent due to a pool. If you have a pool, we recommend you increase your insurance coverage. This is typically a minimal expense.

#### **Step 7: Provide Property Information**

- Give CrossView Property Management all relevant property details, including maintenance records and appliance manuals.
- Complete the Property Detail Sheet in its entirety and send the completed document back to your property manager.

#### **Step 8: Hand Over Keys and Access Information**

- Provide all keys and access instructions to CrossView Property Management for showings and tenant move-in. This includes all gate/ amenity devices.
- 3 key copies are needed (1 for CVPM and 2 for tenants), if applicable 1 garage door opener per car space. If you have a door keypad, we will need to the entry code and the master programming code as well as the instructions to change the code between tenants.

#### **Step 9: Communication Channels**

- Establish clear communication channels with CrossView Property Management for updates, questions, and emergencies.
- Please remember to submit your forwarding address to USPS and update your address with personal contacts, creditors, delivery online stores and services. Please note that delivery vendors such as UPS, FedEx, etc. will deliver

packages to the delivery address you have on file with the store you order from, so please be sure when you place an order that your delivery address is correct.

#### **Step 10: Set Rent**

- Agree on rental rates based on a Comparative Market Analysis report provided by your designated Property Manager.

#### **Step 11: Property Walkthrough**

- Test and replace batteries in all smoke detectors.
- If the home has an attached garage, wood burning fireplace, or fossil fuel burning heater or appliance, and the home is built after July 1, 2008, the property must have a Carbon Monoxide Alarm within 10 ft of each bedroom.
- Be sure to provide your property manager with the last time the fireplace was inspected.
- A final property walkthrough will be completed by CrossView Property Management before the tenant moves in and uploaded to your Owner Portal.

By following this comprehensive checklist, you can smoothly hand over your property to CrossView Property Management to manage.