

Onboarding Checklist (Tenant in place)

Step 1: Provide Notice to current Property Management Company if applicable.

- Carefully read through the management agreement you have with the property management company. Look for clauses related to termination, notice periods, and any specific requirements. 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.
- Send the termination letter using a method specified in the management agreement. Common methods include certified mail with return receipt requested, email (if allowed), or hand delivery.

Step 2: Return of Property and Documents:

Lease Agreement and Application

- Obtain a copy of the current lease agreement and application.
- Review the terms, conditions, and expiration date of the lease.

Tenant Contact Information:

- Collect contact details of the current tenant, including phone number and email, copy of ID's, etc., vehicle and pet information.

Rent Payment Records:

- Request documentation of rent payment history.
- Verify any outstanding balances or late payments.

Security Deposit:

- Confirm the amount and status of the security deposit.
- Check for any existing damage that might affect the return of the deposit.

Step 3: 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 4: Provide Property and Resident Information

- Give CrossView Property Management all relevant property details, previous lease agreements and security deposits, including maintenance records and appliance manuals.
- Complete the Property Detail Sheet in its entirety via the CrossView Property Management website.

Step 5: 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 6: Communication Channels

- Establish clear communication channels with CrossView Property Management for updates, questions, and emergencies.
- Tenants will be sent an invitation to access their tenant portal as well as an introductory email from CrossView Property Management notifying them of the takeover.
- 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 7: 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 and photos will be uploaded to your Owner Portal.

By following this comprehensive checklist, you can smoothly hand over your property to CrossView Property Management to manage with a tenant in place.