PropertyOptix
PROPERTY COMPLIANCE

Property compliance checklist

Which obligations apply here, who holds each, and when each falls due.

Fill in who holds each obligation before you fill in any dates — a flat in a block splits duties between the leaseholder landlord and the freeholder's managing agent, and that is the gap neither party's tracker shows. Take every period from the current regime; none is printed here, and several differ between England, Wales, Scotland and Northern Ireland.

PROPERTY	LANDLORD	MANAGING AGENT
TENURE / TENANCY TYPE	COMPLETED BY	DATE

WHICH OF THESE APPLY TO THIS PROPERTY

Not exhaustive, and several apply only to certain property types, tenures or nations.

	APPLIES	N/A
Gas safety check and record	☐	☐
Electrical installation condition report	☐	☐
Portable appliance inspection, where the landlord supplies appliances	☐	☐
Energy performance certificate	☐	☐
Minimum energy efficiency standard	☐	☐
Smoke alarms	☐	☐
Carbon monoxide alarms	☐	☐
Fire risk assessment — communal areas	☐	☐
Fire doors and means of escape — communal areas	☐	☐
Emergency lighting — communal areas	☐	☐
Legionella risk assessment	☐	☐
HMO licence	☐	☐
Selective or additional licensing	☐	☐
Asbestos — communal areas of blocks	☐	☐
Lift examination, where there is one	☐	☐
Fitness for human habitation	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

WHO HOLDS EACH ONE

The question that goes wrong.

Obligation — holder — basis (lease, management agreement, statute)	
Obligation — holder — basis (lease, management agreement, statute)	
Obligation — holder — basis (lease, management agreement, statute)	
Obligation — holder — basis (lease, management agreement, statute)	
Obligation — holder — basis (lease, management agreement, statute)	
Anything neither party has claimed	

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STATUS

Dates from the current regime. Record where that came from.

Obligation — last satisfied — next due — certificate ref — where held

Obligation — last satisfied — next due — certificate ref — where held

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Obligation — last satisfied — next due — certificate ref — where held

Obligation — last satisfied — next due — certificate ref — where held

Obligation — last satisfied — next due — certificate ref — where held

SERVED ON THE TENANT

A separate duty from holding the certificate, and the one usually missed.

	SERVED	DATE	N/A
Gas safety record	☐	☐	☐
Electrical installation condition report	☐	☐	☐
Energy performance certificate	☐	☐	☐
How to rent guide, where it applies	☐	☐	☐
Deposit prescribed information	☐	☐	☐
Licence conditions, where licensed	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

REMEDIAL ACTIONS ARISING

A certificate with observations on it is not a clean bill. Owner and date against each.

SIGN-OFF

COMPLETED BY

DATE

REVIEWED BY

DATE

NEXT REVIEW

FILE HELD AT

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