PropertyOptix
PROPERTY COMPLIANCE

Tenancy compliance checklist

Record the date and the method, not a tick. 'Served' proves nothing.

This file is what a landlord can rely on a year from now. Take every deadline from the current regime; none is printed here, and some differ between England, Wales, Scotland and Northern Ireland. Do not attach copies of identity documents to this sheet.

PROPERTY	TENANTS	TENANCY TYPE
START DATE	COMPLETED BY	DATE

DOCUMENTS SERVED

Date and method for each. 'Emailed to both tenants on 14 March, read receipt saved, hard copy at check-in' is what survives.

Tenancy agreement — signed by all parties on

How to rent guide (where it applies) — served on — how

Gas safety record — served on — how

Electrical installation condition report — served on — how

Energy performance certificate — served on — how

Deposit prescribed information — served on — how

Licence conditions, where licensed — served on — how

Any other document required for this tenancy

CHECKS BEFORE THE TENANCY STARTS

	DONE	N/A
Right to rent checked for every adult occupier, where the scheme applies	☐	☐
Referencing completed	☐	☐
Guarantor obtained and documented, where required	☐	☐
Identity verified for all tenants	☐	☐
Permitted occupiers recorded	☐	☐
Pets agreed and documented, where applicable	☐	☐
Licence in place where the property requires one	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

DEPOSIT

Protection and prescribed information are separate steps, and both are time-bound.

Amount taken

Date received

Scheme used, and whether custodial or insured

Date protected

Scheme reference

Prescribed information served on — how — to whom

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SAFETY AT THE START

	IN DATE	COPY GIVEN	N/A
Gas safety record	☐	☐	☐
Electrical installation condition report	☐	☐	☐
Smoke alarms present and tested in the tenant's presence	☐	☐	☐
Carbon monoxide alarms present and tested, where required	☐	☐	☐
Fire safety information for communal areas, where applicable	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

CHECK-IN

	DONE	N/A
Inventory and schedule of condition completed	☐	☐
Inventory given to the tenant, with time allowed to comment	☐	☐
Meter readings taken and recorded	☐	☐
Keys issued and recorded	☐	☐
Utilities and council tax notified	☐	☐
Tenant shown stopcock, consumer unit and isolation points	☐	☐
Contact details for repairs given	☐	☐
	☐	☐
	☐	☐
	☐	☐

FILE COMPLETE

COMPLETED BY

DATE

CHECKED BY

DATE

ANYTHING OUTSTANDING, AND BY WHEN

RENEWAL DIARY DATE

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