

**Vacating Checklist**

This checklist should be used as a guide and completed at the time of vacating a tenant.  
This will ensure we have all the relevant tenant details and documentation, for compliance purposes.

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| Tenant Details | | | | |
| Tenant name |  | | | |
| Address |  | | | |
| Organisation Number |  | | | |
| ITV notification received | /      / | Received by | Choose an item. | |
| Vacate date | /      / | ITV form completed | **YES** | **NO** |

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| Greentree Actions for Tenancy Officer | | | | |
| Action | | Attachment / Notes | | |
| Post ITV form out to tenant if not completed | | An ITV form should be send for completion to tenant as soon as practical. | | |
| Raise a SR for a pre-vacancy inspection | | Pre-vacancy inspections must be completed seven (7) days prior to the vacancy date. Follow pre-vacancy checklist | | |
| Raise a follow up | | Three (3) day follow up created to confirm ITV is on track & to discuss key return process | | |
| Raise a SR to vacancy | | Attach ingoing inspection - if no ingoing make mention in notes as well as any related info re property condition prior to outgoing inspection | | |
| Clearly note where the keys will be returned to including:  The key tag number  Note if we hold no keys  Where the keys are  Where the tenant will leave/return their set of keys to | | |
| Raise a CR to Allocations | | General notes - Local Intel re area and/or neighbours | | |
| Finalise rent calculation | | Calculate remaining rent owed up until agreed vacate date and cancel Centrepay Save cancellation receipt to Greentree | | |
| During Follow Up (Tick Box Once Completed) – Tenancy Officer | | | | |
| Check for outstanding debt or Credit | | | |  |
| Get bond release form signed for any debt (if not obtained at pre-vacancy inspection) | | | |  |
| Get bank details for any possible credit | | | |  |
| Discuss keys return options – update SR to Vacancy if required | | | |  |
| Update the following custom fields with: | | | | |
| Termination Reason | Reason for Leaving | | Where House Next |  |
| Record forwarding address in GT | | | |  |

| Actions When Tenant Not Vacating or Vacate Date Delayed (Tick Box Once Completed) | | |
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| HM **must** send an email to the Vacancy and Allocation teams notifying them of the delay and/or changes | |  |
| HM **must** update the ITV SR to reflect any changes agreed | |  |
| Update new vacate date      /      / | |  |
| Actions After Tenant Has Vacated (Tick Box Once Completed) | | |
| HM **must** check keys returned against key record or, | |  |
| If agreed with tenant to leave the keys at the property, confirm with Property Officer for keys returned | |  |
| HM **must** check if outgoing report was received from Property Officer via email | |  |
| HM **must** enter vacate date and key return date as the same date & tick tenant vacated Box in Greentree | |  |
| HM **must** enter the vacate date in the property custom field | |  |
| HM **must** raise a communication to Allocations, Vacancy and Income Management to advise that the property is now vacant | |  |
| HM **must** save this checklist to the ITV Service Request |  |  |
| HM **must** hand hardcopy file To Income Management | Handover date      /      / |  |
| For Regional, Team Leader will collect files and hand to Income Management | Handover date      /      / |  |

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| **Additional Notes** |