

Property manager onboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Check this template against your local regulations and your own policies before you use it.

Employee _____ Role _____ Start date _____

Buddy or manager _____

Onboarding From the signed offer to the end of probation

TASK	DUE	DATE	INITIALS
Before day 1			
☐ Check their real estate license or registration is current, as the role requires	Before day 1		
☐ Collect the contract, payroll details and emergency contacts	Before day 1		
☐ Set up email, the property management system and the phone system Give trust accounting access only as their role allows.	Before day 1		
☐ Prepare their keys, car arrangements and business cards	Before day 1		
Day 1			
☐ Introduce them to the team, and who covers what	Day 1		
☐ Go through the agency's service standards and response times	Day 1		
☐ Show the key register and how keys are signed out and back	Day 1		
☐ Explain how to report a complaint, an incident or a data breach	Day 1		
Week 1			
☐ Hand over the portfolio with the outgoing manager or team leader Arrears, open maintenance, upcoming vacancies, renewals and difficult files.	Week 1		
☐ Introduce them to owners by email or phone	Week 1		
☐ Go through the procedures manual, section by section	Week 1		
☐ Train on the property management system and trust accounting rules	Week 1		
☐ Go through the local tenancy law, notices and timeframes	Week 1		
Month 1			
☐ Accompany them on routine inspections and a condition report	Month 1		
☐ Review their arrears and maintenance follow-up with them	Month 1		
☐ Hold a 30-day check-in and agree goals	Month 1		
End of probation			
☐ Hold the probation review and confirm the outcome in writing	Month 3		
☐ Update their training record and file	Month 3		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____