Tenancy application procedure

SOP TEMPLATE

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

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To choose tenants fairly and consistently, and give the landlord the information they need to decide.

Scope

Every application for a rental property the agency manages.

Responsibilities

Role	Responsibility
Property manager	Checks applications and recommends applicants to the landlord.
Landlord	Approves the tenant.

Procedure

1. **Take complete applications**

   Accept applications only on your standard form, and collect only what your local rules allow.

2. **Check identity and income**

   Check identity documents and that the rent is affordable on their income.

3. **Check rental history**

   Call previous landlords or agents, and check any tenancy database as your local rules allow.

4. **Compare fairly**

   Compare applicants on the same criteria.

   > **Caution:** Never refuse an applicant because of a protected attribute such as race, religion, disability or family status.

5. **Present to the landlord**

   Send the landlord a summary of the best applicants and get written approval.

6. **Tell the applicants**

   Offer the property to the approved applicant, and tell the others promptly.

Records

- Each application and the checks done.
- The landlord's written approval.

Related documents

- Move-in move-out checklist

Revision history

Version	Date	What changed	Approved by