STANDARD OPERATING PROCEDURE

Tenant Move-In SOP

Document no.	SOP-PRM-001
Revision	1.0
Owner	Property Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To move a new tenant into a rental unit smoothly, with the lease signed, the unit condition documented, and keys and access handed over correctly.

2. Scope

Applies to residential tenant move-ins from lease signing through key handover. Unit make-ready work before the tenant arrives is covered by the unit turnover SOP.

Definitions

Move-in condition report	A room-by-room record, usually with photos, of the unit's condition at move-in, used later to assess move-out deductions.
Security deposit	Funds held by the landlord during the tenancy to cover damage or unpaid rent, subject to the lease and local law.

3. Responsibilities

Property Manager	Signs the lease with the tenant, approves the condition report, and authorizes the deposit and key handover.
Leasing Agent	Prepares lease documents, walks the tenant through the unit, and completes the move-in condition report.
Maintenance Technician	Confirms the unit is make-ready and fixes any outstanding items found before move-in.

RACI matrix

Activity	Property Manager	Leasing Agent	Maintenance Technician
Prepare and sign the lease	A	R	-
Collect deposit and first payment	R/A	C	-
Complete the move-in condition report	I	R/A	C
Confirm the unit is make-ready	I	C	R/A
Hand over keys and access	A	R	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Signed lease agreement
- Move-in condition report form
- Camera or phone for condition photos
- Keys, fobs and access cards
- Utility setup instructions for the tenant
- Property management software

5. Procedure

Step	Task	Owner	Done
5.1	**Confirm the unit is make-ready** Before scheduling the move-in, confirm with maintenance that the unit has passed its turnover inspection and any outstanding repair items are closed. **Checkpoint:** The unit is marked make-ready in the property management software before a move-in date is confirmed to the tenant.	Maintenance Technician	☐
5.2	**Prepare the lease and disclosures** Prepare the lease agreement and any required disclosures for the tenant's unit and jurisdiction, and review them for accuracy before the signing appointment.	Leasing Agent	☐
5.3	**Review and sign the lease** Walk the tenant through the key lease terms, including rent, deposit, and renewal or notice requirements, and collect signatures from all parties.	Property Manager	☐
5.4	**Collect the deposit and first payment** Collect the security deposit and first month's rent using an approved payment method, following company policy and local law on deposit limits and handling.	Property Manager	☐
5.5	**Walk the unit with the tenant** Walk every room of the unit with the tenant present, pointing out the location of shutoffs, appliances, and any existing wear noted on the condition report.	Leasing Agent	☐
5.6	**Complete the move-in condition report** Photograph and note the condition of walls, floors, fixtures, and appliances room by room, and have the tenant review and sign the completed report. **Checkpoint:** The tenant signs the move-in condition report before keys are handed over, with photos attached for every room.	Leasing Agent	☐
5.7	**Review utility and service setup** Give the tenant instructions for setting up utilities not included in rent, and confirm which services, if any, the property management already provides.	Leasing Agent	☐
5.8	**Explain community rules and contacts** Review parking, pet, noise, and common area rules with the tenant, and provide contact information for maintenance requests and after-hours emergencies.	Leasing Agent	☐

Step	Task	Owner	Done
5.9	**Hand over keys and access credentials** Issue keys, fobs, or access codes to the tenant and record the serial numbers or codes issued against the tenant's file. **Checkpoint:** Every key, fob, or code issued is logged against the tenant's unit file before the tenant leaves the office.	Property Manager	☐
5.10	**File the signed documents** Scan and file the signed lease, disclosures, and condition report in the tenant's record, and set up rent collection in the property management software.	Property Manager	☐
5.11	**Send a welcome follow-up** Send the tenant a welcome message within a few days of move-in confirming their contacts, payment portal, and how to submit a maintenance request.	Leasing Agent	☐

6. Quality checks

- Every move-in has a signed lease and a photo-documented condition report on file.
- Deposits are collected and recorded within the limits set by the lease and local law.
- Keys and access codes issued are logged against the correct tenant file.
- Units are confirmed make-ready before a move-in date is offered to a tenant.

7. Records

- Signed lease agreement and disclosures
- Move-in condition report with photos
- Key and access issuance log
- Deposit receipt

8. KPIs

- Percentage of move-ins with a completed condition report
- Average time from lease signing to key handover
- New tenant satisfaction score

9. Common mistakes

- Handing over keys before the condition report is signed by the tenant.
- Skipping photos on rooms that look undamaged.
- Not confirming the unit is make-ready before scheduling the move-in.
- Collecting a deposit amount that doesn't match the lease or local limits.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

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