

My Background:



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Documenting Inspection and Files, and Conducting Inspections

Kathryn King, Owner / Broker, KJK Properties, P.C.
Property Managing and Selling Real Estate since 1998

1. Documenting begins with copies, copies, copies from the very beginning
 - a. Keep a copy of your advertising in the event you have a dispute. Include pet policies, utility costs.
 - b. Fill out your application information correctly – disclose fees, deposits.
 - c. Have a showing log – a simple way of tracking how you showed unit.
 - d. At the time of receipt of an application provide your LBP disclosure and screening criteria. Have the applicant initial and date them after review and keep it with your vacancy file.
 - e. Take a copy of the front and back of state issued ID at this time and obtain most recent pay stub.
 - f. Make sure the application is complete. If you must collect from the resident the application is useful for finding them.
 - g. This is a great time to let your potential resident know your inspection procedures and your maintenance schedule. That way they understand now you are an involved landlord.
2. Keep your delivery of documents in order!
 - a. Lead Base Paint and lead booklet first.
 - b. Screening criteria next – first come first served, fair, complete info to screen.
 - c. Application last.
 - d. Once you have provided a-c you can collect the screening fee.
 - e. Give the applicant a receipt for the screening fee.
 - f. Keep expectations in line with this applicant – it's a good time to discuss your policies and procedures.
3. The applicant is approved. Move in appointment
 - a. Take a move in form and do a physical walk through with the tenants. Expect this to take 1-2 hours.
 - b. Have them make all notations of condition in their own handwriting.
 - c. While resident is noting the condition you take hundreds (literally) of photos of everything: windows, blinds, doorframes, fixtures, under sinks, outside walls, outside beds, outside grass, outside edging. Anything that can become a question for "reasonable wear and tear vs. damages" becomes a photograph.
 - d. Both parties sign the move in inspection report.
 - e. Be as detailed as possible on move in documents.
 - f. Test the smoke detector and c02 detector. Have this initialed by both parties on the lease.
 - g. Run water in tubs and sinks. 1-2 inches suffices. Verify with the resident beside you that drains function. Explain clogs are the expense of the resident.
 - h. Sign all other addenda. Recommended: smoke alarm addendum, mold and mildew addendum, no smoking addendum, safety addendum, lawn maintenance agreement, lead based paint addendum, criminal activity addendum, and utility transfer form.
 - i. Somewhere on your agreement I advise that you list keys given, remotes given, serial #'s on any detached appliances and an inventory of appliances present on the premises at move in. The additional provisions portion of the MMHA form is a good place for this.
 - j. Upon signing by both landlord and resident, provide a copy to the resident.
 - k. Design some sort of contact information sheet for the resident that includes all ways they may be reached in the event of an emergency. Keep this inside the front of your file.
 - l. Return to home or office and immediately cancel your interim utility accounts.
 - m. Receive back the utility transfer form from your resident. These include utility account #s to verify all have been initiated.

- o. Keep copies of all notices given during the term of the tenancy and all correspondence.

4. Inspections

- a. Do monthly drive by's.
- b. Always keep an eye on the yards – use a yard service and bill back if this area becomes a problem. Modify the agreement in writing.
- c. Interior inspections – we do them after move in – see to it all is well. A rule of thumb we use is 2 x a year for general inspections.
- d. If you receive a complaint about a resident, use it as an opportunity to go in and check on the resident.
- e. Use spring and fall maintenance as another opportunity for inspection.
- f. When you go to inspect or winterize spigots, clean gutters, winterize sprinkler systems, look around and observe for unapproved occupants, deferred maintenance, illegal activity, violations of pet policies.
- g. Take a checklist with you to your inspections – plan for 1 hour each time and be thorough.
- h. Have your service personnel keep an eye on interiors while there – drug odor? Pets? Dirty? Vermin? Extra inhabitants?
- i. After an inspection put the filled checklist in the file for verification and reference.
- j. Follow up in writing on any violations or concerns. Work with the resident to resolve them.

5. Maintenance requests

- a. Let your residents know you require maintenance requests in writing – no exceptions.
- b. Follow up with habitability issues immediately.
- c. Handle other requests within 30 days.
- d. Charge tenants accordingly if it is beyond “reasonable wear and tear”
 - i. Always have your service providers note the cause!
 - ii. Log how you handled all maintenance requests. It's convenient to write an outcome at the bottom of the maintenance request form. File it for your reference.

6. Move out appointments

- a. When your resident gives notice affirm this in writing.
- b. Take your original move in form to the move out.
- c. Take an hour and compare the condition of the interior and exterior to that of move in.
- d. Test all drains, fixtures, switches, blinds, windows to see if there has been a failure of function.
- e. Make no promises on return of deposit.
- f. Collect the forwarding address at this time.
- g. Prepare your punch list of items to address.

7. Final accounting

- a. Check all utilities for balances.
- b. Transfer all utilities back to you as of the date of the surrender of keys.
- c. Check for late fees.
- d. Check for damages line up work and get billed by vendors, or estimate.
- e. Check for unpaid prorated rent.
- f. Get the check out in 15 days in Washington and 31 in Oregon.
- g. Take to the post office on a day you can obtain a certificate of mailing. Not all are open Saturdays.
- h. Keep the evidence of certificate of mailing in the file.
- i. If the final accounting is returned keep it unopened.

8. Records – keep them all for 6 years.

- a. Current tenancies.
- b. Past tenancies.
- c. Denied and unconsummated applications.

For more information and a private consultation on how to use your own real estate assets to your benefit, please contact me. We can discuss value, reasonable rents, concessions, capital improvements, and the prospect of increased cash flow with a lease option. The best business person does their due diligence and makes wise decisions based on facts. Now is the time to evaluate your real estate holdings with a long view.

Information courtesy of Kathryn King, KJK Properties, P.C. Kathryn is a licensed Realtor in OR and WA serving buyers and sellers.

For a confidential asset review please contact me direct at:

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