Changeover checks - what was built and how it works

RNL / TLS system · built 21-22 September 2026 · on every site · from the walk-through of 27 Back Brudenell Mount (contract group 9047)

In one paragraph: at every changeover the office needs to show that the owner was told the tenancy was ending, that we knew who was cleaning, that the new tenants were told how the changeover works, that evidence for the deposit was taken before the end and again once the keys were back, that the clean was done and photographed and the tenants told, that the tenants were chased for their own condition report, that the charges and deposit letters went out, and that the tenants' questions were answered. The **Changeover checks** card puts those twelve checks in one place, shows what the system already holds for each, and lets staff tick them or send the email and tick in one click.

1. Where to find it

- **Property → change over** (the "change over" link in the property sidebar). The card sits at the top and looks at the property's current changeover: the open group whose end date has passed or falls in the next 60 days, and the next group starting after it.
- **Contract group → change over checklist** (the Change Over page for a group). The same card, for that group.

Either page works. The ticks are held on the **contract group** (the outgoing one), so a tick made on the property page shows on the group page and the other way round.

2. The twelve checks and what the system shows beside each

Check	What the card reads from the system	Button
Owner told tenancy ending	Emails sent to the owner in the four months before and six weeks after the end date. A blue dot when one is about the end of the tenancy.	email owner + tick
Cleaner confirmed (who is cleaning)	The owner's maintenance record: *Cleaning Done By* (agent / owner) and the *Change Over Cleaning Note*. The group's *End Cleaning Team* on Other Info (waiting / allocated / started / finished, team, date, time). Whoever is on a cleaning task or a changeover sheet row.	other info, raise a cleaning task
Tenants told changeover process	Emails to the incoming tenants about the changeover, moving in, the inspection or the clean.	email incoming tenants + tick (stock wording)
Deposit evidence before end	Our condition reports and inspections in the 75 days before the end date, with the number of photos on each.	condition reports, inspections
Check-out report once keys back	The date the keys came back (from the tenants' contracts) and our reports dated after it, with photo counts.	condition reports, keys
Clean done	Clean rows on the changeover sheet for the year, and cleaning tasks on the property with the worker and the done date.	tasks, refresh from sheet
Cleaning photos on file	How many photos are in the cleaning photos gallery for the year. Amber when there are none.	cleaning photos, upload photos
Tenants told clean done	Emails to the incoming tenants mentioning the clean.	email incoming tenants + tick
Tenants' own report chased	How many of the incoming tenants have submitted their own condition report, and any chaser emails.	email incoming tenants + tick
Charges letters sent	Charges emails to the outgoing tenants.	open deposits and letters
Deposit letters sent	The deposit letter dates stamped on the contracts and deposit emails to the outgoing tenants.	open deposits and letters
Tenant questions answered	How many emails have come in from the tenants since a month before the end, and when the last one arrived.	email outgoing / incoming tenants

3. Reading the card

- ✓ **green tick** - ticked, with the date and the person who ticked it.
- ● **blue dot** - the system found evidence but nobody has ticked it yet.
- ⚠ **amber triangle** - something is missing (for example no cleaning photos).

- ○ **grey circle** - nothing recorded either way.

Top of the card: the outgoing group with its dates and tenants (links to the group page, the change over checklist and the deposits and letters page) and the incoming group with its start date and tenants. When there is no incoming group yet, the three tenant-facing checks say so and wait.

4. Ticking, clearing and send + tick

- **tick done** stamps today's date and your name on the check. A ticked check shows **clear tick** instead.
- **email owner + tick** opens a new email to the owner and ticks the check.
- **email incoming tenants + tick** opens the email-all-tenants page with the subject and stock wording already filled in, and ticks the check. Edit the wording before sending. The three stock texts cover: the changeover process (we inspect, clean and photograph before you move in; submit your own condition report on the portal within 7 days; reply with any questions), the clean being done, and a chase for the condition report.
- Every tick or clear is written to the group's change-over history, so the checklist page shows who did what and when.

5. Works list

Under the card is every task raised on the property from 75 days before the end date: task number, date raised, room, the work (and what was done), who pays, the worker and the status (open, done with date, cancelled). Links go to all tasks, add a task and bulk update. This is the list of works for the changeover.

6. How the ticks are stored

- The twelve checks are ordinary change-over checklist items. They are added to the checklist by name the first time the card is opened on a site, alongside the existing items (Condition report Agent / Tenant, Elect, Epc, Gas).
- A tick is stored on the outgoing contract group's checklist, exactly as the Check links on the change over checklist page store theirs, with a history row and an audit entry.
- Nothing is written unless the group belongs to the property and the request carries the page's security token.

7. Worked example - 27 Back Brudenell Mount, group 9047

Check	What the card shows
Owner told tenancy ending	Only maintenance and statement emails to the owner near the end. Not ticked.
Cleaner confirmed	Owner's record: cleaning done by **owner** - "We do not carry out any EOT cleans unless requested NLB". End cleaning team: allocated. Cleaning task with Leeds Property Group.
Deposit evidence before end	Reports 10/06 and 27/06 (the 27/06 one not locked) and the 29/06 report with 489 photos.
Check-out report once keys back	Keys back 28/06/2026. Report 23817 on 29/06 with 489 photos.
Clean done	Task 218672 done with Leeds Property Group.
Cleaning photos on file	None in the gallery for 2026.
Deposit letters sent	The 24/08 "Deposit statement" email.
Charges letters sent	Nothing found.
Tenants told process / clean done / report chased	No incoming group on the property yet.
Tenant questions answered	2 emails received from the tenant, last 05/08/2026.

Full technical reference: docs/systems/CHANGEOVER_CHECKS.md in the code repository.