SITE SURVEY REPORT

Property management onboarding checklist

Prepared for	Northgate Lettings (fictional)
Date	20 Oct 2026
Site	Northgate Lettings
Prepared by	S. Okoro

FORM

Property management onboarding checklist

1. Management instruction

Project or site	Northgate Lettings: 14 Cardigan Terrace, Leeds
Record reference	ONB-2026-214
Record date	20 Oct 2026
Prepared by	S. Okoro, property manager
Property reference and address	P-214, 14 Cardigan Terrace, Leeds LS6 (three flats in a converted house)
Property type	Block of flats
Property entrance (GPS)	Front door · 53.814270, -1.573220 (SE 28197 35416, ±6 m)

Photo of the entrance



Management start date	2 Nov 2026
Management authority or agreement reference	Management agreement MA-2026-214, signed 16 October 2026
Responsible property manager	S. Okoro

2. Records and access

Management scope and responsibilities confirmed	Confirmed
Existing property and tenancy records referenced	Exception

What is the exception, or why does it not apply?	Fire risk assessment for the common parts and the maintenance file not yet received from the outgoing agent.
Access arrangements and key handover referenced	Confirmed
Existing maintenance issues and suppliers reviewed	Exception
What is the exception, or why does it not apply?	Open job with the outgoing agent for a damp patch in the flat 1 bathroom. Contractor and job reference requested.

Documents and certificates 1: Gas safety record

Document	Gas safety record
Status	Received
Reference or where it is filed	Portfolio folder P-214/03
Expiry or next due date	10 Dec 2026
Days from the management start	38
Expiry check	Due within 60 days

Documents and certificates 2: Energy performance certificate (EPC)

Document	Energy performance certificate (EPC)
Status	Received
Reference or where it is filed	Portfolio folder P-214/04
Expiry or next due date	1 Mar 2031
Days from the management start	1580
Expiry check	In date

Documents and certificates 3: Smoke and carbon monoxide alarm records

Document	Smoke and carbon monoxide alarm records
Status	Received
Reference or where it is filed	Portfolio folder P-214/05, last test at the July check-in

Documents and certificates 4: Deposit protection certificate

Document	Deposit protection certificate
Status	Received

Reference or where it is filed	Tenancy files T-214-1 to T-214-3

Documents and certificates 5: Fire risk assessment

Document	Fire risk assessment
Status	Requested
Who is chasing it, and by when	S. Okoro, from the outgoing agent by 27 October

Documents and certificates 6: Maintenance and supplier file

Document	Maintenance and supplier file
Status	Requested
Who is chasing it, and by when	S. Okoro, from the outgoing agent by 27 October

Documents and certificates 7: Electrical installation condition report (EICR)

Document	Electrical installation condition report (EICR)
Status	Received
Reference or where it is filed	Portfolio folder P-214/02
Expiry or next due date	1 Oct 2026
Days from the management start	-32
Expiry check	Expired
Received	5
Requested, not received	2
Expired at the start	1
Due within 60 days	1
Condition inspection and inventory references	Check-in inspection CI-214 booked for 3 November; inventories INV-214-1 to INV-214-3 received
Utility and account handover references	Landlord electricity for the common parts transferred from 2 November; account reference held in the management system
Key sets received	3
Key register reference	KR-214

Photo of the key sets and tags



Meter readings at the start 1: Gas

Meter	Gas
Meter serial number	G4A 0076 3381
Reading	8412
Where the meter is	Front cellar head, left of the steps

Meter readings at the start 2: Electricity

Meter	Electricity
Meter serial number	K 18 0446 21
Reading	49735
Where the meter is	Under-stairs cupboard, common hall

Photo of the reading



Meters read	2

3. Handover actions

Missing records and next steps	The EICR next due date (1 October 2026) has passed, so a new inspection is needed. The common parts fire risk assessment and the maintenance file are requested, not received. The flat 1 damp job has no contractor reference yet.

> Record receipt and references rather than sensitive identity, banking or access details. Follow the organisation's secure handover process.

Record status	Open
Next action or reason none is needed	Book an electrician for a new EICR before the start date, chase the outgoing agent for the fire risk assessment and maintenance file, and get the damp job details.
Responsible person	S. Okoro
Reviewed by	M. Haigh, lettings director
Reviewer acknowledgement	M. Haigh