Leasing Process Procedure

Purpose and outcome

This procedure guides real estate professionals through a residential rental transaction from the first landlord or tenant meeting through lease execution, key delivery, commission processing, and file closeout. It is designed to produce a consistent file, clear communication, fair treatment of applicants, and a documented handoff to the landlord and tenant.

Use the workflow that matches the agency relationship. Complete every applicable step, record decisions and approvals in the transaction system, and confirm current brokerage policy and local, state, and federal requirements before relying on any form, deadline, fee, screening standard, deposit practice, or disclosure.

Document owner	Brokerage or property management leadership
Applies to	Residential houses and apartments offered for lease
Primary systems	MLS, RentSpree or approved screening platform, RBO or approved transaction system
Review cycle	At least annually and whenever laws, brokerage policy, forms, or systems change
Source baseline	918 Rental Process Checklist, expanded for operational use

Required operating principles

- Apply written qualification standards consistently and follow fair housing requirements in advertising, showings, screening, negotiations, and communication.
- Do not promise approval, availability, repairs, possession, or lease terms without the authorized party's written confirmation.
- Use secure, approved systems for applications, identity records, screening reports, funds, and sensitive personal information.
- Document material instructions, offers, approvals, denials, disclosures, and changes. Retain records according to brokerage policy and applicable law.
- Escalate legal questions, reasonable accommodation or modification requests, service animal matters, screening disputes, suspected fraud, safety concerns, and conflicts of interest to the broker or qualified counsel.

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Roles and responsibilities

Role	Primary responsibility	Key records
Listing representative	Advise the landlord, prepare and market the listing, coordinate applications, communicate landlord decisions, and close the listing file.	Listing agreement, disclosures, MLS record, communications, lease and closeout
Tenant representative	Identify needs, arrange showings, obtain application instructions, present the tenant's materials, explain agency, and support lease and move in.	Representation agreement, disclosures, showing record, application instructions, lease and closeout
Landlord	Approve price and terms, establish lawful screening criteria, review qualified applications, select an applicant, execute the lease, and meet property obligations.	Written instructions, approval or denial, lease, deposit and payment records
Tenant	Provide accurate application information, review disclosures and lease terms, pay approved amounts through authorized channels, and complete move in requirements.	Application, supporting documents, signed disclosures, lease, receipts and condition report
Broker or manager	Provide supervision and resolve compliance, agency, advertising, screening, compensation, and file exceptions.	Approvals, exception notes and compliance review

Select the correct workflow

Situation	Primary client	Workflow	Agency focus
Property owner hires the brokerage to market a rental	Landlord	A Landlord listing	Listing duties and landlord instructions
A prospect contacts the listing representative and has no representative	Landlord	B Unrepresented prospective tenant	Clear agency disclosure and no tenant advocacy
A renter hires the brokerage to locate a property	Tenant	C Tenant representation	Tenant search and representation duties
The brokerage may represent both sides	As permitted and disclosed	Agency review before proceeding	Obtain required informed consent or use designated agency as permitted

File setup for every transaction

- ☐ Confirm the parties' legal names, contact information, property address, agency relationship, and authorized decision makers.
- ☐ Open the transaction in RBO or the approved transaction system and use a consistent file name.

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- ☐ Create a timeline for listing activation, showings, application review, lease execution, required payments, possession, and closeout.
- ☐ Upload signed documents, material emails and messages, screening instructions, approvals, receipts, and evidence of delivery.
- ☐ Confirm how confidential and sensitive records will be received, shared, retained, and destroyed.

Core compliance checkpoints

- Fair housing. Use objective, written standards. Avoid language or conduct that states or implies a preference, limitation, or discrimination based on a protected characteristic.
- Agency. Explain whom the brokerage represents before providing services that could be understood as representation. Complete required disclosures and obtain consent when dual or designated agency may apply.
- Lead based paint. For housing built before 1978, follow applicable federal disclosure, pamphlet, acknowledgment, and recordkeeping requirements before the tenant is obligated under the lease.
- Property specific conditions. Provide required notices and disclosures for items such as well water, utilities, known conditions, smoking, pets, insurance, association rules, or local rental licensing when applicable.
- Screening and consumer reports. Use an approved screening process, obtain authorizations, limit access to reports, and follow applicable adverse action requirements when a consumer report affects the decision. Rentspree is available through the MLS.
- Funds. Do not accept or direct deposits, rent, commissions, or other payments outside approved instructions. Provide receipts and follow trust account, escrow, deposit, and timing rules that apply in the jurisdiction.

Recommended transaction record

Record	Minimum content	When to update
Contact log	Date, person, method, summary, commitment, follow up	After each material communication
Showing log	Date, attendees, access, feedback, incident or issue	After each showing
Application log	Received date, completeness, platform, status, landlord direction	At each status change
Document register	Document name, version, signer, date sent and date completed	Whenever a document moves
Funds log	Purpose, amount, payer, payee, approved method, receipt	At instruction or confirmation

Workflow A Landlord listing

Use this workflow when the landlord is the brokerage's client and the brokerage is marketing the house or apartment for lease.

1 Intake property review and authority

- ☐ Verify the landlord's identity, ownership or authority to lease, and the names of all parties who must sign.
- ☐ Ask whether the property is subject to condominium or homeowners association rules, rental registration, inspection, permit, rent regulation, occupancy limits, or other restrictions. Refer legal questions to the broker or counsel.

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- ☐ Document the desired rent, included services and utilities, lease length, availability date, deposit and fee proposal, pet and smoking rules, maintenance contacts, showing instructions, and communication preference.
- ☐ Inspect or review the property's readiness, safety concerns, access method, keys, lockbox, required certificates, and planned repairs. Do not market a property as ready until the landlord confirms the required work and availability.
- ☐ Determine a supportable market rental range from current and recent comparable properties, condition, location, amenities, utilities, seasonality, and time on market. Present the analysis and record the landlord's final written instructions.

2 Agency forms and disclosures

- ☐ Provide the Real Estate Disclosure Notice [501] and retain the licensee confirmation.
- ☐ Provide the Fair Housing Notice [401], Broker Commission Advisory [402], and Information About Federal Lead Laws [437], as applicable under current brokerage requirements.
- ☐ Execute the Exclusive Right to Lease Listing Agreement [417] and any required compensation or marketing authorizations.
- ☐ Complete the Lead Paint Disclosure [406] when applicable and gather required property disclosures, notices, certificates, rules, and addenda.
- ☐ Explain dual agency [504] and designated agency [505]. Obtain required consent before acting in a permitted dual or designated agency relationship.

3 Screening plan and application instructions

Before advertising, ask the landlord to approve written, lawful, property-specific screening standards and a consistent review method. The standards should be applied in the same manner to every applicant unless an approved reasonable accommodation requires a different process.

- ☐ Define the application package, approved screening provider, application fee if lawful, required identity and income documents, guarantor process, pet information, occupancy needs, and submission method.
- ☐ Define how applications will be reviewed: first complete qualified application, batch review, or another lawful method approved by the broker.
- ☐ Define who makes the decision and how approval, conditions, waitlist status, denial, or withdrawal will be documented and communicated.
- ☐ Confirm procedures for reasonable accommodations, assistance animals, disputed report information, adverse action notices, and secure disposal of sensitive documents.

4 Marketing and listing activation

- ☐ Prepare accurate photographs and copy. Describe the property, rent, availability, included utilities, objective terms, and application process without discriminatory or misleading language.
- ☐ Confirm the key and lockbox work, install the For Lease sign if authorized, and document access restrictions and occupied-property notice requirements.
- ☐ Enter the listing in MLS, upload all required disclosures and supporting documents, and activate RentSpree or the approved application link.
- ☐ Create and manage the listing in RBO, including due dates, required documents, communications, and assigned tasks.
- ☐ Send the landlord the executed listing package and a copy or preview of the published listing. Obtain written approval for material changes.

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5 Showings inquiries and landlord updates

- ☐ Respond to inquiries using consistent property facts and application instructions. Do not answer questions about neighborhood demographics or protected classes.
- ☐ Schedule showings according to the landlord's instructions and lawful notice requirements. Confirm identity and safety procedures under brokerage policy.
- ☐ Record showing activity, feedback, maintenance observations, and follow-up commitments. Promptly report property security, damage, access, or safety issues.
- ☐ Send the landlord regular activity reports with inquiries, showings, feedback, applications, market response, and recommended changes. Avoid sharing protected or irrelevant personal information.

6 Application handling and landlord decision

1. Send every applicant the same current application link, instructions, disclosures, deadlines, and contact for questions.
2. Time-stamp receipt and check the package for administrative completeness. Do not alter or supplement applicant information without permission.
3. Transmit the RentSpree or approved screening report securely to the authorized landlord contact. Explain the report's scope without making the landlord's decision.
4. Ask the landlord to evaluate the application against the approved written standards and record the landlord's decision in writing.
5. Communicate approval, conditional approval, waitlist status, or denial using broker-approved language. If a consumer report influenced an adverse decision, follow the required adverse action process.
6. Protect reports and application documents from unauthorized access. Retain or dispose of them according to policy and law.

7 Lease execution and move in preparation

- ☐ Prepare or coordinate the approved lease [433] and all required addenda. Do not draft legal terms outside the forms and authority permitted by the brokerage.
- ☐ Confirm the names, premises, rent, term, due dates, included utilities, deposit and fee amounts, possession date, maintenance reporting, insurance requirements, rules, concessions, and special conditions.
- ☐ Route the lease for review and signature in the proper order. Ensure all pages, initials, addenda, and required disclosures are complete before confirming execution.
- ☐ Provide fully executed copies to the landlord and tenant. Record delivery and keep the signed version in RBO.
- ☐ Confirm lawful payment instructions, required receipts, utility transfers, proof of insurance if required, move-in appointment, keys, access devices, parking, and building procedures.
- ☐ Arrange a move-in condition report and dated photographs when required or advisable. Make clear who will hold deposits and manage the tenancy after possession.

8 Listing closeout

- ☐ Update MLS status promptly and accurately, remove the lockbox and sign, and account for all keys and access devices.
- ☐ Complete the RBO file, commission demand and agent payment request. Send invoices only to the correct authorized recipient and verify payment instructions.
- ☐ Deliver or arrange delivery of the commission payment to the office through the approved process.
- ☐ Confirm that required communications, approvals, disclosures, screening records, lease documents, receipts, and closeout evidence are stored in the file.

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- ☐ Send the landlord and tenant a closing message identifying the property management contact, payment channel, maintenance process, emergency contact, possession details, and any outstanding item.

Workflow B Unrepresented prospective tenant

Use this workflow when the landlord is the client, the property is the brokerage's listing, and the prospective tenant has no representative. Make the agency relationship clear and avoid giving the prospect advice that would conflict with duties to the landlord.

1 First substantive contact

- ☐ State that the brokerage represents the landlord and that information provided to the listing representative may be shared with the landlord as permitted by law and policy.
- ☐ Provide the Real Estate Disclosure Notice [501] and retain the licensee confirmation. Provide the Agency Disclosure [502].
- ☐ Provide the Well Water Advisory [551] when applicable and the pamphlet Protect Your Family From Lead in Your Home [203] for applicable pre-1978 housing.
- ☐ Explain the property's objective terms, availability, showing process, application instructions, and whom the prospect may contact for independent advice.

2 Showing and application

- ☐ Schedule and conduct the showing according to the listing instructions and applicable notice, safety, and access requirements.
- ☐ Provide the property's lead paint disclosure when applicable and obtain the required acknowledgment before the prospect becomes obligated.
- ☐ Send the approved RentSpree application link and the same written instructions supplied to other prospects.
- ☐ Do not advise the prospect what terms to offer or whether a lease is in the prospect's best interest. Answer factual questions and refer legal interpretation to independent counsel.
- ☐ Send the completed screening result to the landlord through the approved secure channel and document the landlord's written decision.

3 Approval lease and closeout

- ☐ Communicate the landlord's decision using approved language and complete any required adverse action process.
- ☐ Coordinate lease signing, required payments, move-in information, key exchange, and delivery of the fully executed lease.
- ☐ Create or complete the transaction in RBO and upload all material communications and documents.
- ☐ Prepare the commission demand and agent payment request in RBO. Confirm the correct recipient before sending an invoice; the source checklist's reference to a buyer's attorney may not apply to a rental transaction.
- ☐ Arrange delivery of the commission payment to the office and verify every closeout task is complete.

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Communication boundary

Appropriate factual assistance	Requires caution or referral
Property features, stated rent, availability, published application steps	Advice about bargaining against the landlord's interests
How to access disclosures and the application platform	Interpretation of legal rights, lease clauses, or remedies
Status updates authorized by the landlord	Assurances of approval, repairs, possession, or future landlord action
How to submit an accommodation request	Judging whether a disability, accommodation, or assistance animal is valid

Workflow C Tenant representation

Use this workflow when the tenant has engaged the brokerage to locate and lease a property.

1 Tenant intake and representation

☐ Provide the Real Estate Disclosure Notice [501] and retain the licensee confirmation.

☐ Execute the Exclusive Right to Represent Lessee [523] and explain services, term, compensation, termination, confidentiality, and any tenant payment obligation.

☐ Document the tenant's price range, target areas, timing, household size, property needs, accessibility needs, pets or assistance animals, transportation and utility preferences, lease length, and other lawful criteria.

☐ Provide the Well Water Advisory [551] and the pamphlet Protect Your Family From Lead in Your Home [203] when their subject matter may apply.

☐ Set up the MLS portal and agree on communication frequency, showing availability, documentation needs, and application readiness.

2 Search and property review

☐ Search using the tenant's stated criteria without steering based on neighborhood demographics or protected classes. Direct the tenant to neutral sources for information outside the agent's expertise.

☐ Review listing status, rent, fees, utilities, availability, application requirements, compensation, property disclosures, association rules, and showing instructions before scheduling.

☐ Schedule and conduct viewings. Record material property facts, questions for the listing agent, and the tenant's decision about next steps.

☐ Explain dual agency [504] and designated agency [505] and obtain required consent before proceeding when the same brokerage is involved on both sides.

3 Application and presentation

1. Obtain the current application instructions directly from the listing representative and identify deadlines, fees, screening provider, supporting records, and method of review.
2. Provide the lead paint disclosure supplied through MLS or the listing representative when applicable and obtain the required acknowledgment.

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3. Help the tenant organize a complete, accurate submission without changing facts or sending sensitive data through unapproved channels. Submit if applicable: Rider - Landlord to Pay Tenant's Broker Representation Fee [573].
4. Confirm receipt and ask the listing representative for status updates. Do not promise approval or attempt to influence the decision using protected or irrelevant personal information.
5. If the tenant receives an adverse decision or disputes screening information, identify the notice and dispute channels provided by the landlord, screening provider, or consumer reporting agency. Refer legal questions appropriately.

4 Lease review coordination and move in

☐ Obtain the proposed lease and all addenda from the listing representative and deliver them promptly to the tenant.

☐ The tenant should confirm the terms match the accepted proposal. Refer legal interpretation or proposed legal language to qualified counsel.

☐ Track signatures, deposits and payments through approved channels, receipts, utility transfer, insurance, move-in inspection, keys, access devices, parking, and building instructions.

☐ Create the transaction in RBO and upload the representation agreement, disclosures, application instructions, material communications, lease, receipts, and closeout documents.

☐ Prepare the commission demand and agent payment request in RBO and send the invoice to the authorized party identified by the transaction documents. Do not assume a buyer's attorney is involved.

☐ Coordinate key exchange, deliver or arrange delivery of the commission payment to the office, and add the tenant to the Sphere of Influence list only in accordance with consent and communication preferences.

Lease and move in quality check

Before the tenant takes possession, the responsible representative should verify each applicable item or record who owns the follow-up.

Check	Verification	Owner or evidence
Parties and premises	Legal names, unit, included areas, parking and storage are correct	Executed lease
Dates and money	Term, possession, rent, due dates, prorations, deposits, fees and concessions match	Lease and receipts
Required documents	Disclosures, notices, rules and addenda are signed and delivered	Document register
Property readiness	Required repairs, safety items, cleaning and access are confirmed	Written landlord confirmation
Utilities and insurance	Transfer dates and required proof are complete	Confirmations or policy evidence
Condition record	Condition form and dated photos are completed where required or advisable	Signed report and images
Access	Keys, fobs, remotes, codes and mailbox access are accounted for	Key receipt
Contacts	Rent payment, maintenance, emergency and management contacts are delivered	Move-in message

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Exception and escalation process

1. Pause the affected step when the issue could change a party's rights, agency duties, fair housing treatment, handling of funds, property access, safety, or record accuracy.
2. Preserve the relevant documents and record the facts without speculation.
3. Notify the broker or manager and identify the decision needed, deadline, and people affected.
4. Obtain written direction and, when appropriate, refer the party to legal, tax, insurance, environmental, accessibility, or other qualified advice.
5. Record the resolution, communicate it only to authorized people, and resume the workflow when approved.

File closeout standard

- All required agreements, disclosures, acknowledgments, addenda, and the final lease are signed and delivered.
- MLS and transaction system statuses are accurate; the sign, lockbox, keys, and access devices are accounted for.
- Screening decisions, approvals, notices, application status, and material communications are documented without unnecessary sensitive information.
- Commission documents and payment handling are complete and match the transaction's authorized parties.
- Outstanding repairs, payments, documents, or move-in items have a named owner and due date.
- The file meets brokerage retention, privacy, security, and supervision requirements.

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