

Repairs and Maintenance Procedure

Purpose of the Procedure

To ensure that repairs are accurately recorded and arranged in a timely manner.

Notes

This procedure is based on access to the following:

- Property Management computer software has an ability to generate a work order for the repair contractor. If no facility exists in the software, then a manual work order, (in duplicate) should be generated.
- Property Management software that has a computerised diary facility attached to the properties under management. If no computerised diary facility is available, action steps and conversations should be recorded in the relevant paper based files.
- The timing of the various action steps in this procedure is based on SA Residential Tenancy legislation.
- There are references in this procedure to specific staff members in relation to specific activities. In some agencies, these roles may be performed by another member of staff or the title may be different.

Repairs and Maintenance Policies

1. Record the date and time the request is received.
2. Every request for repairs must be properly recorded and processed using the established procedure (no exceptions).
3. Obtain as much detail about the requested repair as possible including makes and models of appliances (if you don't already have them on record).
4. If an appliance requires repair, check whether the appliance is still under warranty.
5. Always check the repair cost limit the Landlord Client Landlord Client has given you (if any), before arranging any repairs.
6. Landlord Clients must be advised and instructions sought:
7. If the estimated repair cost exceeds the nominated expenditure limit the Landlord Client has given you in the Management Agency Agreement
8. If no authority is included in the Management Agency Agreement.
9. Where the Landlord Client owns only one property and proposed maintenance will exceed more than 4 weeks rent, the Landlord Client must be requested to forward to the Company the estimated cost of the maintenance, to be held in trust pending receipt of the contractor's invoice.
10. All trades people being used must have the appropriate licenses & public liability insurance. These are to be viewed, certificate of currency received & a diary note made to ensure that this is reconfirmed each year on the renewal dates. (Keep a photocopy in an "Approved Tradespersons" folder).
11. Only Company approved contractors are to be used for any repairs or maintenance work.
12. Access to the property is to be confirmed with the occupants, unless it is to repair an "Urgent Repair" as named under the Residential Tenancy Agreement and the occupant is not contactable.
13. Email, is the preferred form of communication (unless specifically instructed otherwise).
14. Where there is a reference made to the use of a particular letter to a Landlord Client or Tenant in the following procedure, it is possible to be replaced or used in conjunction with a phone call or email. Providing the date, contents of the call/email and the Landlord Client or Tenant's

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- responses are clearly recorded in either the “Landlord Client” or “Tenant” section on the computer (whichever is appropriate).
15. All documentation sent or received in relation to a managed property is to be dated (received or sent) and filed appropriately (soft copy preferred).
 16. All actions and/or communications in relation to a managed property are to be recorded in the appropriate section of the computer. The date, details and people involved are to be recorded.
 17. SA legislative and Management Agency Agreement requirements must be met at all times.
 18. All Agency employees must act in the best interests of the Landlord Client at all times.
 19. Any variation that is required to the approved Agency Policies and Procedures must be approved by the Department Manager.
 20. Standard Agency checklists, letters and forms are to be used and updated at all times.

Documents used in this Procedure

Forms

Repair Request Form	Form18
Approved Tradesperson List	Form44
Repairs & Maintenance Checklist	Form48

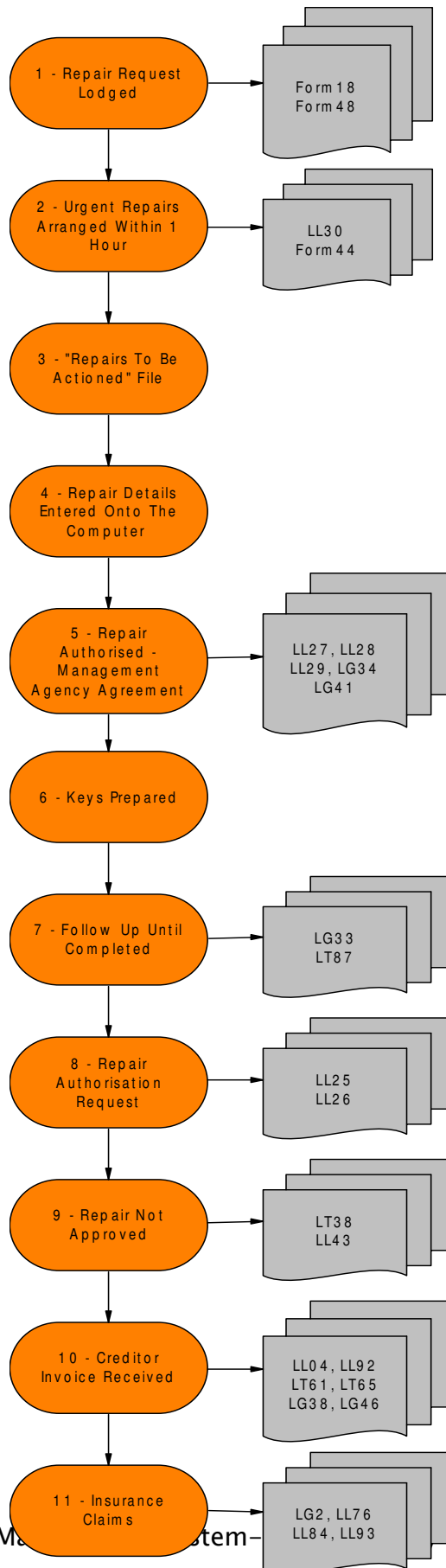
Letters

Finance – Insufficient Funds To Pay Invoice	LL24
Repairs – Completed And Invoice Paid	LL92
Repairs – Confirm Completed	LT61
Repairs – Delayed Rectification	LT87
Repairs – Exceed Authority Expenditure Limit	LL26
Repairs – Insurance Claim Cover Page	LG2
Repairs – Insurance Claim Finalised	LL84
Repairs – Insurance Claim Made	LL76
Repairs – Insurance Details Request	LL93
Repairs – MAA Authorised & Quotes Enclosed	LL29
Repairs – MAA Authorised & Repairs Arranged	LL27
Repairs – MAA No Authority To Repair	LL25
Repairs – No Action	LL43
Repairs – No Action	LT38
Repairs – Tenant Negligence Request To Pay	LT65
Repairs – Trades Completion Report	LG38

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Repairs – Trades Contract Agreement & Document Request	LG34
Repairs – Trades Information Update	LG41
Repairs – Trades Status Request	LG33
Repairs – Trades Work Completed Not Authorised	LG46
Repairs – Urgent Repair Carried Out	LL30
Periodic Inspection – Report Cover Page (Work Required)	LL28

Procedure Flow Chart



Procedure Steps

Step 1. Repair Request Lodged

Performed By: Property Manager

Task Details

Forms and Letters used in this step: [Form18](#), [Form48](#)

- 1.1 The Tenant lodges a request for a repair by letter, phone call, fax, email or over the internet.

Step 2. Urgent Repairs Arranged Within 1 Hour

Performed By: All Team Members
Property Manager

Task Details

Forms and Letters used in this step: Letter [LL30](#), [Form44](#)

- 2.1 All urgent repairs, as listed under the Tenancy Agreement are attended within 1 hour of becoming aware of the repair.
- 2.2 Confirm the Landlord's instructions regarding tradespeople, or
- 2.3 Company approved tradesperson arranged to attend property.
- 2.4 Relevant staff member/s are advised, if appropriate.
- 2.5 Arrange an inspection and take photos, especially if:
 - An Insurance Claim is to be made
 - The Tenant is likely to seek some form of compensation.

Step 3. "Repairs To Be Actioned" File

Performed By: Property Manager

Task Details

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- 3.1 Repair Request Forms are placed in the "Repairs To Be Actioned" tray.
- 3.2 Repairs are attended to once a day, not randomly throughout the day.

Step 4. Repair Details Entered Onto The Computer

Performed By: Property Manager

Task Details

- 4.1 The repair is arranged, as per the Management Agency Agreement instructions:
 - Does the Landlord require notification?
 - Is there a repair expenditure limit?
 - Does the Landlord have preferred tradespeople?
- 4.2 If the repair is likely to be an insurance claim, confirm the Landlord's insurance details/company.
- 4.3 The insurance company is contacted to ascertain if they have preferred tradespeople and if an assessor is required.
- 4.4 Enter the details of the repair onto the computer under maintenance for that property. It then becomes the Agency's permanent record of the repair.

Step 5. Repair Authorised – Management Agency Agreement

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LL27](#), [LL28](#), [LL29](#), [LG34](#), [LG41](#)

- 5.1 When you are authorised to carry out the repair, enter the appropriate creditor's details onto the work order from Step 4, including a due date, for follow up.
- 5.2 Send the computer generated work order to the tradesperson, via email or fax.

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- 5.3 Only company approved tradespeople may be used.
- 5.4 No repairs are to be given over the phone:
 - Verbal reports, often lead to the wrong work being completed and issues as to who will pay for the invoice.
- 5.5 Maintenance history kept current on the computer system at all times.

Step 6. Keys Prepared

Performed By: Property Manager

Task Details

- 6.1 If the Tradesperson has the Tenant's permission to gain access with the Agency keys, ensure keys prepared and ready for collection.

Step 7. Follow Up Until Completed

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LG33](#), [LT87](#)

- 7.1 Once a week, a report is generated from the computer system showing all outstanding repairs, by Creditor.
- 7.2 Each Creditor is sent this report and a status report is requested.
- 7.3 The Creditor is given a deadline to update the status report.
- 7.4 Contact Tenants and Landlords a minimum of once per week – with the current status of their repair, even if nothing has changed.
- 7.5 Update the repair details on the computer to reflect the current status.
- 7.6 If using a manual system:
 - File work orders in an alphabetical order in a Repairs folder
 - File under Creditor name
 - Type address of repair locations onto Repair Status letter
 - Send to Creditor as per the computerised steps.

Step 8. Repair Authorisation Request

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LL25](#), [LL26](#)

- 8.1 Where no, or insufficient repair authority is given, contact the Landlord for instructions.
- 8.2 When authorised go to Step 7.
- 8.3 If there is no response from the Landlord, follow up in 7 days.
- 8.4 Where the Landlord does not respond, seek the Department Manager's instructions. Consider the following:
 - Will the property be damaged if the repair is not attended to?
 - Will the Tenant make a valid compensation claim, if the repair is not attended to?
 - Will the repair cost more, if it is not attended to?
 - Always act in the Landlord's best interest.

Step 9. Repair Not Approved

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LT38](#), [LL43](#)

- 9.1 Where the Landlord does not give authority for the repair to be completed, the Tenant is advised within 24 hours.
- 9.2 The Landlord's instructions are confirmed with the Landlord.
- 9.3 Computer system is updated.

Step 10. Creditor Invoice Received

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LL24](#), [LT61](#), [LT65](#), [LG38](#), [LL92](#), [LG46](#)

- 10.1 All invoices must be approved by the 10th and 25th of each month.
- 10.2 Confirm invoice details are consistent with those on the work order.
- 10.3 If the invoice/Creditor indicates that the repair may have been caused by tenant negligence, clarify with the Creditor and then the Tenant.
- 10.3 The Tenant is contacted to confirm that the work has been completed in the required manner.
- 10.4 If necessary, inspect the work and take photos.
- 10.5 Ensure the agency is holding sufficient funds to pay the invoice.
- 10.6 If insufficient funds held, advise the Landlord and request payment.
- 10.7 Update computer to reflect all details/status on the invoice:
 - Exact details of work carried out
 - Invoice number
 - Amount invoiced
 - Date work completed.
- 10.9 Stamp approved invoices and file for payment.
- 10.10 If using a manual follow up system, file documents.

Step 11. Insurance Claims

Performed By: Property Manager

Task Details

Forms and Letters used in this step: Letters [LG2](#), [LL76](#), [LL84](#), [LL93](#)

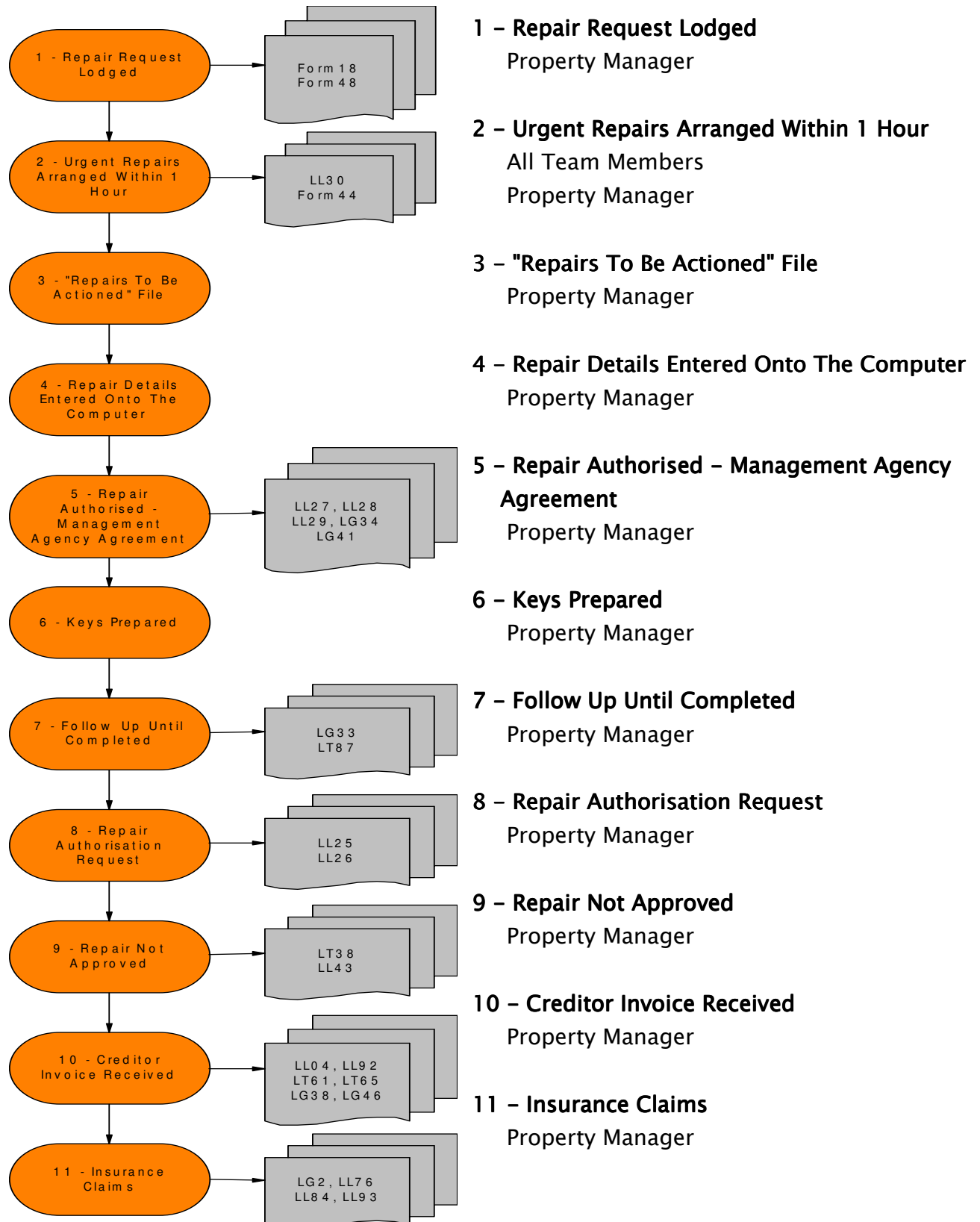
- 11.1 Complete the insurance company's Claim Form, including:
 - Assessors report
 - Creditor invoices/quotes
 - Photos
 - Statutory Declarations (if required).

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- 11.2 Ensure all documents are photocopied and filed.
- 11.3 Submit the completed Claim Form to the insurance company.
- 11.4 Advise Landlord that the claim has been made.
- 11.5 Diarise to follow up until the claim is finalised.
- 11.6 When the refund cheque is received, reimburse the Landlord for any invoices/ compensation that the insurance company has covered and the Landlord has paid.
- 11.7 If the Creditor is awaiting payment, pay them immediately.
- 11.8 Update the computer and file the documentation.

Quick Guide

Repairs and Maintenance Procedure



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The Bob Walters Property Management System– Sample Policy and Procedure