

## 4.43 New Tenancy Sign Up Policy

| Schedule Information                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Policy Category                              | <b>Category 1 - ELT</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|                                              | <b>Category 2 – Housing Only</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Directorate Lead                             | Housing & Estates                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Committee                                    | ELT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Policy Owner                                 | Director of Housing & Estates                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Lead Author                                  | Senior Housing Officer                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Summary of Policy Changes                    | <p>Previous versions prior to 2016 are available on request.</p> <p><b>Dec 2019 V1.0</b> – No previous versions, this is a new policy.</p> <p><b>Dec 2022 V2.0</b> - Change of organisation branding and policy header changed to fall in line with new Website / Intranet branding. Minor changes; consent to share information, NOK information and photo ID consent.</p> <p><b>V2.1 - January 2024</b> – Template update.</p> <p><b>V2.2 – January 2026</b> – Extension for policy review.</p> <p><b>V2.3 – March 2026</b> – Expiry extension to Oct 2026</p> |
| Document Superseded                          | 4.43 New Tenancy Sign Up Policy V2.1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Consultation Process                         | PPWG, ELT                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Impact Assessment Completed                  | Organisational Policy that can be made available in languages other than English and can be made available in Easy Read                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Statutory, Regulatory, Compliance Considered | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Key Words                                    | Allocations, lettings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Policy Cross Reference                       | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| PPWG Date                                    | January 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| ELT Date                                     | January 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Committee Date                               | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Published Date                               | January 2023                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Review Date                                  | August 2025                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Expiry Date                                  | October 2026                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Target Audience                              | Organisation wide                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Additional Circulation                       | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Contact Details                              | Corporate Governance Department<br>St Anne's Community Services<br>Fountain Court, 12 Bruntcliffe Way, Leeds, LS27 0JG<br>Tel: 0113 2435151 Email: <a href="mailto:governance@st-annes.org.uk">governance@st-annes.org.uk</a>                                                                                                                                                                                                                                                                                                                                    |
| Storage & Version Control                    | Whilst this policy may be printed and shared, the electronic copy posted on the internal intranet is the controlled document.                                                                                                                                                                                                                                                                                                                                                                                                                                    |

## Introduction

Effective tenancy management is one of the core functions of the organisation. Good tenancy management has the potential to:

- Increases tenant satisfaction
- Reduces void rates and rent arrears levels
- Reduce neighbour problems and anti-social behaviour and
- Increase tenancy and community sustainability

To deliver effective tenancy management it is essential that our tenants have a clear understanding of their rights and responsibilities and those of the organisation. This should be explained at the pre tenancy stage and during the tenancy sign up process.

## Tenancy Sign Up

This usually takes place at the property and is conducted by a member of the Housing Team. Prior to attending the tenancy sign up appointment, the prospective tenant will be advised to bring to the appointment:

- Their bank details to set up a standing order or direct debit (2023)
- Photo ID where available or two other forms of ID and
- Confirmation of their income/ benefits

Please see table below for ID documents that can be used:

| Photographic ID                           | Non-Photographic ID                                                                             |
|-------------------------------------------|-------------------------------------------------------------------------------------------------|
| Current signed Passport                   | Original Birth Certificate                                                                      |
| Current UK or EEA Driving Licence         | Utility Bill (gas, electric, phone bill)                                                        |
| National Identity Card (Citizenship Card) | Local Authority Council Tax bill                                                                |
| Provisional Licence                       | Benefit book or original Notification Letter from Benefits Agency                               |
|                                           | NHS Medical Card or letter of confirmation from GP's practice                                   |
|                                           | Council/Housing Association rent card or Tenancy Agreement for current year                     |
|                                           | Bank, Building Society or Credit Union statement or passbook dated within the last three months |

The following will be undertaken at the tenancy sign up appointment using the Tenancy Sign Up Checklist (**Appendix 1**) and completing the Client Information form (**Appendix 2**).

1. Welcome the new tenant to St Anne's
2. Completion of Client Consent to Share Form (**Appendix 3**)
3. Explanation of the contents of the tenant's handbook, pointing out important information such as what to do in emergencies and how to report a repair
4. Completion of Standing Order/ direct debit mandate form (**Appendix 4**) and/or Housing Benefit/Universal Credit forms to ensure that rent payments are in place at the start of the tenancy. Where a tenancy commences part-way through a calendar month, action should be taken to ensure this part months' rent is paid and benefits etc. claimed accordingly
5. Signing of Tenancy Agreement and Licence agreement once the new tenant has been advised of both their rights and responsibilities and those of St Anne's. Go through the Easy Read Version of tenancy agreement and request the tenant also signs this document if this is applicable.
6. Completion of the CORE Monitoring Form
7. Issue the tenant with the following:
  - Tenancy agreement including easy read version
  - Tenants handbook
  - EPC
  - Gas Certificate (where there is a gas supply)
  - Right to Rent booklet
  - Lettable Standard Guide (**Appendix 5**)
8. Complete the Tenancy Sign Up Checklist (**Appendix 1**)
9. The keys should then be issued once the above has been completed

The finance department then need informing of any new tenancy sign up.

### Post Tenancy Visit

This is completed by a member of the Housing Team within 4 weeks of the tenancy commencement.

- The purpose of this visit is to:
- Give the tenant the opportunity to cover issues which may have arisen since they moved into the property and to clarify information given to them when they signed their tenancy agreement
- Complete the post tenancy satisfaction survey (**Appendix 6**)
- Check the tenant is residing at the property
- Remind the tenant of their obligations and to check for any breaches in tenancy agreement and to check rent payments up to date and housing benefit payments in place
- Check if there are any repairs required

**Appendix 1 – Tenancy sign up checklist**

| <b>4.43 New Tenancy Sign Up Policy V2.0 – Appendix 1</b> |  |
|----------------------------------------------------------|--|
| <b>Tenancy Sign Up Checklist</b>                         |  |
| Tenancy Agreement                                        |  |
| CP12 Gas certificate received                            |  |
| EPC received                                             |  |
| EICR                                                     |  |
| How to rent guide checklist                              |  |
| Proof of ID- passport, birth certificate                 |  |
| Follow up visit booked                                   |  |
| <b>Please initial each section above and sign below</b>  |  |
| <b>Signed by Tenant:</b>                                 |  |
|                                                          |  |
|                                                          |  |
| <b>Address:</b>                                          |  |
|                                                          |  |
|                                                          |  |
| <b>Date:</b>                                             |  |

| <b>4.43 New Tenancy Sign Up Policy V2.0 – Appendix 2</b> |   |
|----------------------------------------------------------|---|
| <b>Client Information Form</b>                           |   |
| <b>Payment Agreement</b>                                 |   |
| Date                                                     |   |
| Client Name                                              |   |
|                                                          |   |
| Client Address                                           |   |
|                                                          |   |
| <b>Weekly Rent Amount</b>                                |   |
| Weekly ISC Charge                                        | £ |
| Weekly HB Contribution                                   | £ |
| Weekly Client Contribution                               | £ |
| Account Balance                                          | £ |
| Payment Agreement Amount                                 | £ |
| <b>Payment Frequency (tick appropriate box)</b>          |   |
| Weekly                                                   |   |
| Fortnightly                                              |   |
| Monthly                                                  |   |

**Appendix 2 - Client Information form**

| <b>4.43 New Tenancy Sign Up Policy V2.0 – Appendix 2</b>      |          |
|---------------------------------------------------------------|----------|
| <b>Client Information Form</b>                                |          |
| <b>Name of person completing form</b>                         |          |
| Client Details                                                |          |
| Date Moved In                                                 |          |
| Title                                                         |          |
| Name                                                          |          |
| Address                                                       |          |
| Telephone Number                                              |          |
| Email address                                                 |          |
| Date of Birth                                                 |          |
| Gender                                                        |          |
| National Insurance Number                                     |          |
| Ethnic Origin                                                 |          |
| Disability                                                    |          |
| Nationality                                                   |          |
| Religion                                                      |          |
| Sexuality                                                     |          |
| <b>Economic Status (tick relevant box)</b>                    |          |
| Client is in paid employment                                  |          |
| Client would like paid employment                             |          |
| Client not in paid employment                                 |          |
| <b>NOK details</b>                                            |          |
| Name:                                                         |          |
| Relationship:                                                 |          |
| Address:                                                      |          |
| Contact number/ email:                                        |          |
| <b>Contact Details</b>                                        |          |
| How does the client want to be contacted? (tick relevant box) |          |
| Telephone                                                     |          |
| Letter                                                        |          |
| In Person                                                     |          |
| By Mobile Phone                                               |          |
| By SMS                                                        |          |
| Large Print Required?                                         | Yes / No |
| Picture Format Required?                                      | Yes / No |
| <b>What is the clients preferred language?</b>                |          |

**4.43 New Tenancy Sign Up Policy V2.0 – Appendix 2**
**Client Information Form**
**Payment Agreement**

|                                                 |   |
|-------------------------------------------------|---|
| Date                                            |   |
| Client Name                                     |   |
|                                                 |   |
| Client Address                                  |   |
|                                                 |   |
| <b>Weekly Rent Amount</b>                       |   |
| Weekly ISC Charge                               | £ |
| Weekly HB Contribution                          | £ |
| Weekly Client Contribution                      | £ |
| Account Balance                                 | £ |
| Payment Agreement Amount                        | £ |
| <b>Payment Frequency (tick appropriate box)</b> |   |
| Weekly                                          |   |
| Fortnightly                                     |   |
| Monthly                                         |   |

### Appendix 3 Completion of Client Consent to Share Form

#### Client Consent to Share Information

While you are using the services of St Anne's we may need to obtain information about you from other organisations that you are currently in contact with or have been in contact with in the past. We may also be contacted by other agencies that want to share information about you. We will use your information to help us plan services for you and coordinate your housing and support so that you get the most out of the service that we provide for you.

We will need your permission to do this and we will only speak about matters that you have specified.

Please complete the table below to give permission.

| <b>Organisations in which you have given us permission to contact</b> | <b>Contact details</b> | <b>Please tick if you are happy for us to obtain information in relation to you</b> | <b>Please tick if you are happy for us to share information in relation to you</b> |
|-----------------------------------------------------------------------|------------------------|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|
| Local Authority Housing Department                                    |                        |                                                                                     |                                                                                    |
| Social Worker                                                         |                        |                                                                                     |                                                                                    |
| Community Mental Health Team (CMHT / Worker)                          |                        |                                                                                     |                                                                                    |
| GP / Doctor / Health Professional                                     |                        |                                                                                     |                                                                                    |
| Probation                                                             |                        |                                                                                     |                                                                                    |
| Department of Work and Pensions                                       |                        |                                                                                     |                                                                                    |
| Other Agency / Department (please state)                              |                        |                                                                                     |                                                                                    |

#### Declaration

**Client name:**

**Client signature:**

**Date:**

**Support Worker signature:**

**Date:**

## St Anne' Community Services Staff Manual

### Appendix 4 Standing Order/ direct debit mandate form

#### Standing Order Request

##### New Request

Dear .....(Name of Bank)

Please can I arrange to set up a monthly standing order from my bank account starting from ..... until further notice.

Account Name .....

Account No .....

Sort Code .....

Four Weekly Amount .....

Reference.....(Your Name)

I would like the funds be sent to the following bank account:-

**St Anne's Community Services**

**Unity Trust Bank**

**9 Brindley Place**

**Birmingham**

**B1 2HB**

**Account No – 20254179**

**Sort Code – 60-83-01**

Thank You

Signed .....

Signed .....



# Photographic Consent Form

Name: .....

Address: .....

## Data protection notice

St Anne's Community Services must comply with the Data Protection Act 2018 and therefore must obtain your consent in order to take your photograph and/or record your image and use it for any purpose. St Anne's will abide by the Data Protection Act 2018 and will abide by the data protection principles for data processing. If you are unhappy with the way St Anne's handles your data, it has a Quality and Continuous improvement team which you are able to contact to make a complaint via: [quality@st-annes.org.uk](mailto:quality@st-annes.org.uk)

## Declaration

I consent to my photograph being taken and/or image being recorded by a representative of St Anne's Community Services. I understand that I may withdraw my consent at any time and that my consent will remain valid unless I advise otherwise or leave the organisation (employees only).

Signed: .....

Date: .....

## Appendix 5 - Lettable Standard Guide

### 4.43 New Tenancy Sign Up Policy V2.0 – Appendix 5

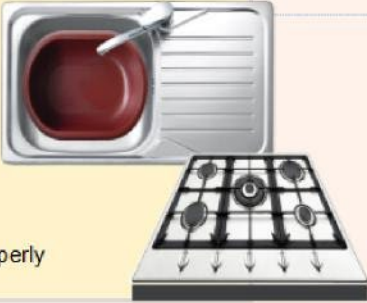
#### St Anne's Lettable Standards — What you can expect:

- Keys for the front, back and communal doors will be provided
- All taps, water supply and controls work
- If you have a staircase, it has a secure banister
- All floors and any stairs are safe
- All windows, doors and window frames are safe and secure and can open and close freely



### Kitchen

- Units are clean and in good working order
- There is a cooker, fridge and a washing machine or access to washing facilities
- Adequate ventilation via window or extractor fan in the kitchen and the extractor fan, if fitted, is clean and working
- Sink, taps and plug holes are clean and work properly



If you discover additional works that need doing after this checklist has been completed, please contact us make arrangements for their completion within a timescale agreed with you



### What you can expect: Room by Room



### Outdoor Space (and gardens)

- All drainpipes, guttering and manhole covers are safe and in good condition
- Any lawns and shrubs are not significantly overgrown
- External surfaces are free from graffiti
- Pathways, within the boundary of your property, are safe



### Bathroom

- The wash hand basin, bath and toilet are serviceable and free from significant cracks and chips
- All sanitary ware is fitted securely, is clean, works well and doesn't leak
- Adequate ventilation in the bathroom via window or extractor fan and the extractor fan, if fitted, is clean and working
- The wash hand basin taps, bath taps and plug holes are clean and work efficiently
- The wash hand basin and the bath have a plug and the waste pipes drain freely



## Appendix 6 - post tenancy satisfaction survey

## 4.43 New Tenancy Sign Up Policy V2.0 – Appendix 6

|                                                                        |     |    |
|------------------------------------------------------------------------|-----|----|
| <b>Tenant Feedback Survey</b>                                          |     |    |
| Please circle your answer                                              |     |    |
| <b>At Your Accompanied Viewing</b>                                     |     |    |
| Did a staff member from St Anne's meet you at the time arranged?       | Yes | No |
| Did they introduce themselves and show their ID?                       | Yes | No |
| Were there any repairs that needed doing when you viewed the property? | Yes | No |
| If yes, did the staff member write them down?                          | Yes | No |
| <b>At Your Sign Up</b>                                                 |     |    |
| Did you receive all the information you needed about your new home?    | Yes | No |
| Where you given instructions on how to use the boiler?                 | Yes | No |
| <b>What did you think about the welcome pack you received?</b>         |     |    |
| Too Much Information                                                   | Yes | No |
| About Right                                                            | Yes | No |
| Not Enough Information                                                 | Yes | No |
| <b>On Moving Day</b>                                                   |     |    |
| Was the property clear of all rubbish?                                 | Yes | No |
| Was the property clean?                                                | Yes | No |
| Were there any repairs still to do?                                    | Yes | No |
| <b>What repairs need to be done?</b>                                   |     |    |
|                                                                        |     |    |

## 4.43 New Tenancy Sign Up Policy V2.0 – Appendix 6

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
| <p><b>How would you rate the decorations/furniture in your new home?</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <br/>             Good         </div> <div style="text-align: center;"> <br/>             Not Good         </div> <div style="text-align: center;"> <br/>             Bad         </div> </div>     |  |  |
| <p><b>If your new home has a garden – do you think it is -</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <br/>             Good         </div> <div style="text-align: center;"> <br/>             Not Good         </div> <div style="text-align: center;"> <br/>             Bad         </div> </div>               |  |  |
| <p><b>Overall at St Anne's - How do you feel about your new home?</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <br/>             Good         </div> <div style="text-align: center;"> <br/>             Not Good         </div> <div style="text-align: center;"> <br/>             Bad         </div> </div>     |  |  |
| <p><b>How do you feel about the service you have received from us?</b></p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <br/>             Good         </div> <div style="text-align: center;"> <br/>             Not Good         </div> <div style="text-align: center;"> <br/>             Bad         </div> </div> |  |  |
| <p><b>Do you want to tell us anything else?</b></p> <div style="height: 40px;"></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  |  |
| <p><b>Have you any ideas how we can do things better?</b></p> <div style="height: 40px;"></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |  |
| <p><b>Name:</b></p> <div style="height: 20px;"></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  |  |
| <p><b>Address:</b></p> <div style="height: 20px;"></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |  |  |
| <p>13</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |  |
| <p><b>Today's Date:</b> 4.43 Tenancy Sign Up Policy V2.3</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |  |  |