



substantial maintenance or refurbishment

property address: _____

property owner: _____

tenant/s: _____

portfolio manager: _____ date issued: _____

work carried out: maintenance: refurbishment: date commenced: _____

date completed: _____ total amount: _____

project management fee percentage: _____ amount claimed by company: _____

	Date	Initials	
PM Confirm written request has been received from property owner to arrange quotes for maintenance and/or refurbishment	_____	<input type="checkbox"/>	
PM Forward letter/email to property owner confirming request received and action plan	_____	<input type="checkbox"/>	
PM Phone the tenant/s to advise of work being done and arrangements	_____	<input type="checkbox"/>	
PM Forward letter to tenant/s confirming arrangements	_____	<input type="checkbox"/>	
PM Prepare and forward maintenance request for quotes to suppliers/ maintenance provider	_____	<input type="checkbox"/>	
PM Schedule follow-up to ensure all quotes received within reasonable time frame	_____	<input type="checkbox"/>	
ONCE QUOTES HAVE BEEN RECEIVED:			
PMC Forward quotes to property owner requesting authorization in writing to approve and accept quote	_____	<input type="checkbox"/>	
PM Organize payment from property owner prior to authorizing work to commence	_____	<input type="checkbox"/>	
<i>No work is to proceed until written authority and payment has been received from the property owner. Payment must be withheld in the Trust Account for progress payments to be made to contractor as due.</i>			
WHILST WORK IS IN PROGRESS TO COMPLETION:			
PM If payment is required on completion of work inspect completed work verifying all due tasks are carried out in accordance with quote/work schedule	_____	<input type="checkbox"/>	
Or:			
PM If progress payments are necessary verify work has been completed in Accordance with work schedule and acceptable prior to making progress or final payment	_____	<input type="checkbox"/>	
PM Photograph completed work	_____	<input type="checkbox"/>	
PM Once completed inform property owner by phone of completion	_____	<input type="checkbox"/>	
PM Invoice property owner applicable project management fee or percentage	_____	<input type="checkbox"/>	
PM Forward email to property owner with photos and invoice confirming conversation and details of completed work	_____	<input type="checkbox"/>	
FC Transfer monies from property owner's trust account for invoice payment	_____	<input type="checkbox"/>	
PM Call tenants to advise work is completed and acknowledge their cooperation	_____	<input type="checkbox"/>	
PMC Upon completion send letter to tenant/s thanking them for cooperating	_____	<input type="checkbox"/>	

TrackMate™ verified for completion: _____ **Date:** _____

NB: If any item is not applicable write next to item N/A.

