



## AGENT TRAINING

MAY 21<sup>st</sup> , 2022



**Here are some of the topics that we need clarification on as agents in regard to our policies**

**LEASES:** <http://www.sanjacintoproperties.com/ResidentialLeaseInstructions.pdf> *This link is a sample lease that has been completely filled out and has instructions and explanations attached. If you aren't sure what to put in a lease, refer to this sample. If you still have questions, contact me with your specific questions and reference the Paragraph number on the lease. There are also tutorials for other contracts & addenda on our Agent Only page.*

**\*Tenants must be screened using MySmartMove.com (or similar software screening program)**

**\*Tenants must complete the TXR Lease Application and provide Pay Stubs and a Driver's License**

**\*If pets are allowed the pets should be screened through PetScreening.com. This will verify any claims is service animals or emotional support animals. You cannot charge a pet deposit for service animals and you cannot deny a tenant who has a verified service animal even if your landlord does not want pets. It is a violation of the Fair Housing (Disability/Handicap). We do not accept dangerous breeds as pets such as Pit Bulls because the insurance won't cover them**

**\*The security deposit and/or first month rent should be collected at least 48 hours prior to move-in and should be certified funds (Cashier's Check) to ensure good funds. You can never have any checks made out to yourself. All checks must be made payable to the landlord (security deposit) and to San Jacinto Properties (full month's rent) so that I can pay both agents involved. Be sure to complete the Agreement Between Brokers form if you are representing the tenant or be sure to get one from the other agent if you represent the landlord. An IRS form W-9 from the Broker is also required from the agent representing the tenant. You will have to ask me if you need one. You also can never be paid directly from anyone except your broker**

**\*The Texas Property Code is very specific about what ALL rental properties must have in place for the safety and security of the tenants. You have an obligation to notify the landlord / tenant if the home is not in compliance with the Texas Property Code requirements. These video links go over the requirements. Be sure to watch these and familiarize yourself with these requirements and share these video links with landlords and tenants. YOU CAN BE HELD LIABLE if these are not in place and the tenant is harmed <https://youtu.be/MWGQTcB7SAQ> and <https://youtu.be/Bwr1vtUeS64>**

**\*Remember that our company policy does not allow you to act as a Property Manager on any properties, including your own. If you own a rental property, we will manage it through our Property Management Division for only \$50 per month.**

**\*If you have a landlord that wants their home to be managed by us as Property Managers you MUST NOTIFY US IN ADVANCE of any lease being accepted because we do not accept all properties or all leases. The property must be within 15 miles of our service area which basically runs from Pearland in the west, La Porte in the east. I-10 to the north and Dickinson to the south. Also, the age and condition of the home is a factor in our decision to manage any property. Our standard fee to manage a property is 5% of the monthly rent. Do not tell a landlord that we will manage their property. Just give us the address and their contact information and we will contact them to discuss the possibility of us managing the property.**

**\*Remind tenants that the lease does not actually end on the expiration date in the lease because without advanced notice (30 days) from either the tenant or the landlord, the lease automatically goes to a month-to-month lease until one side gives at least 30 days notice.**

**\*Make sure that tenants are aware of their responsibilities when they move into a rental property. It's not a Holiday Inn and you can't just ask the landlord to fix everything you want. The tenant is responsible for yard care, changing light bulbs and AC filters, treating for insects and other pests, unclogging the toilet, re-setting the breakers if they trip, etc. Basically many of the same things they would do if they actually owned the home and were living in it**

## **DotLoop:**

**It is very important that you upload ALL documents, contracts & addenda into DotLoop within 24 hours of having them signed. There have been several times that I have received calls from other agents, lenders or title companies about a property that I had no records available on because they were never uploaded into DotLoop by the agent. If you don't upload them, I can't see them (and be sure you share them with me after uploading them) and I won't know how to answer the questions I'm getting from those other agents, lenders and title companies. Be sure to upload the CHECKLISTS we use into DotLoop as well. This way you and I both can be sure that nothing is missing and no mistakes were made. If you need help with DotLoop, there are numerous YouTube videos that show you how to use it, and you can also call their help desk**

## **CDA's:**

**Our fillable CDA is on the AGENTS ONLY webpage on our website. Please be sure you are using the fillable form and have double checked your math. CDA's are due 7 days prior to closing and should never be later than 5 days prior to closing. Also, be sure to add your home address to the bottom of the form in case you are not able to pick up your check from the title company so they won't mail your check to me. CDA's should only be loaded into DotLoop AFTER I have signed them. Send your CDA's to me by email if they need my signature and text me that you have sent it. After I have signed it and returned it to you, you can upload it into DotLoop.**

## **INTERMEDIARY:**

**If you are doing an Intermediary transaction with another one of our agents be sure that you 1) Have both the seller and buyer sign the Intermediary Relationship Notice and include the name of both agents and who they are working with 2) Use the CDA for Intermediary Transactions 3) Remember that our company policy on Intermediary deals where the listing agent requests that another agent help the buyer is only a 10% referral fee to the agent that has been added as an appointee. 85% to the listing agent and 5% to the broker.**

## **EXECUTING CONTRACTS & ADDENDA:**

**Be sure to double check all contracts and addenda to ensure that they have an execution date on them. If it is missing, then be sure to add in the date once everyone has signed and send a copy of the executed document to the Title Company, other agent and lender, as well as upload it into DotLoop. Never put an execution date on a contract or addenda that is missing some of the required signatures. Also, never alter or add anything to a contract or addenda that has already been executed.**

## **YARD SIGNS & LOCK BOXES**

**You MUST have your name phone number on the yard sign or on a rider that is attached to the sign. Company signs are for temporary use only. You need to have your own signs for properties that you list. Remember that all OCCUPIED PROPERTIES must use a Supra iBox lockbox and not a combo box.**