

User Guide:

Salesforce Right to Rent

Version History

Version	Description of Change	Author	Date
0.1	First Version	Nikki Papenfus	13/01/2025
2.0	'RTR not Required' flag added to person account. Updated validation logic. 'RTR Outstanding' & 'RTR Status' flags displayed for Tenancy Reviews.	Nikki Papenfus	07/08/2025

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1. Overview

Grainger is required to check that all tenants in England aged 18 and over have a legal right to rent a residential property.

Where a tenant's right to rent is for a limited time period and will expire during their tenancy, Grainger must also conduct follow-up checks when the right to rent expires or after 12 months, whichever is later. If a follow-up check shows that a person no longer has the right to rent, an official report must be made to the Home Office.

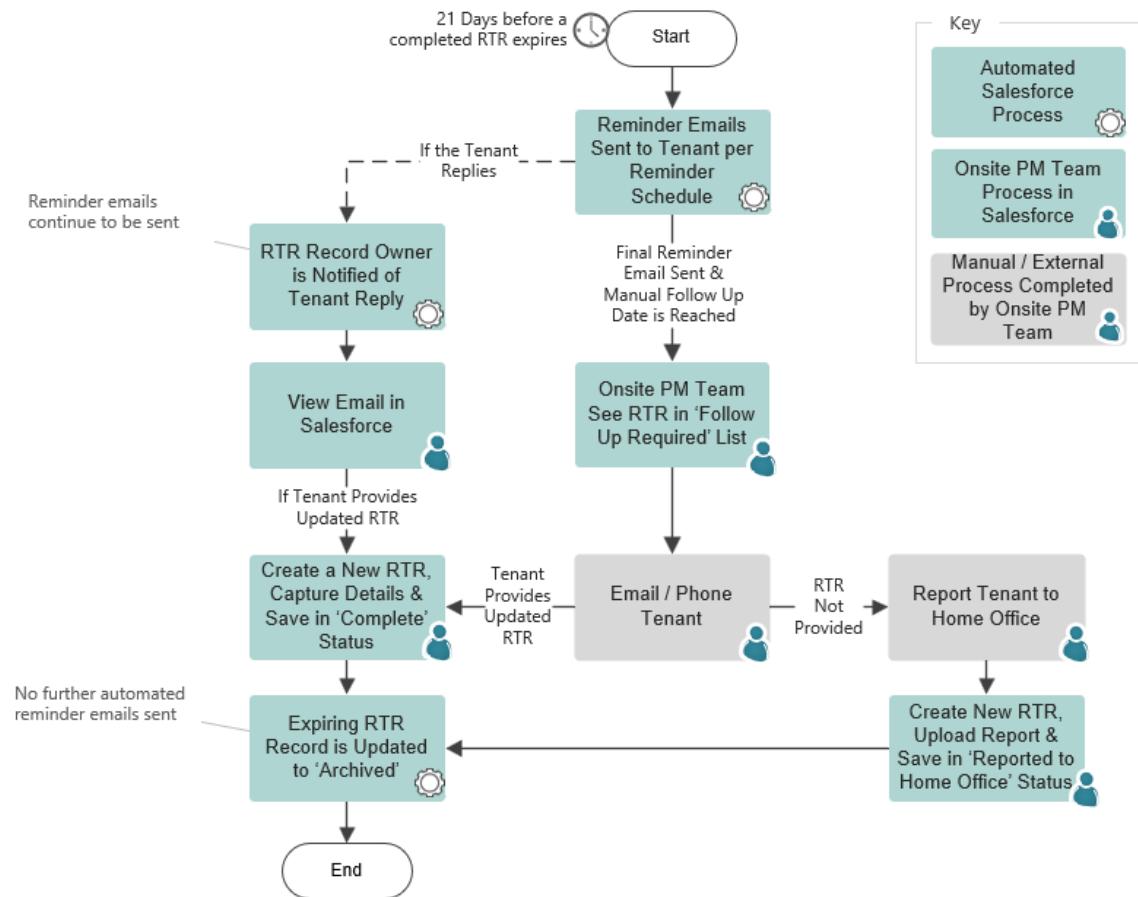
While tenants in Wales, in social housing or in accommodation provided by a local authority are not required to provide a right to rent, it is Grainger policy to request this documentation. However, failure to provide it should not impede a new let or renewal for these tenants.

This user guide details the process to:

- Capture a record of right to rent checks (as well as reports to the home office).
- Check that the necessary right to rents have been obtained at new let or renewal.
- Follow-up with an existing tenant for a new right to rent when theirs is due to expire.

1.1 Follow Up Process

The process to follow up with an existing tenant for a new right to rent will take place initially via a series of automated reminder emails and, if the tenant has still not provided the necessary information, thereafter via manual follow-up by the Onsite Property Management Team.



1.2 Reminder & Follow Up Timelines

Automated email reminders will be sent according to the following timelines:

If RTR Expires before Check Date Anniversary:

21 days before Expiry Date	Reminder Email 1
14 days before Expiry Date	Reminder Email 2
10 days before Expiry Date	Reminder Email 3
60 days before Check Date Anniversary	Reminder Email 4
42 days before Check Date Anniversary	Reminder Email 5
30 days before Check Date Anniversary	Final Reminder Email
28 days before Check Date Anniversary	Start Manual Follow Up

If RTR Expires after Check Date Anniversary:

21 days before Expiry Date	Reminder Email 1
14 days before Expiry Date	Reminder Email 2
10 days before Expiry Date	Final Reminder Email
7 days before Expiry Date	Start Manual Follow Up

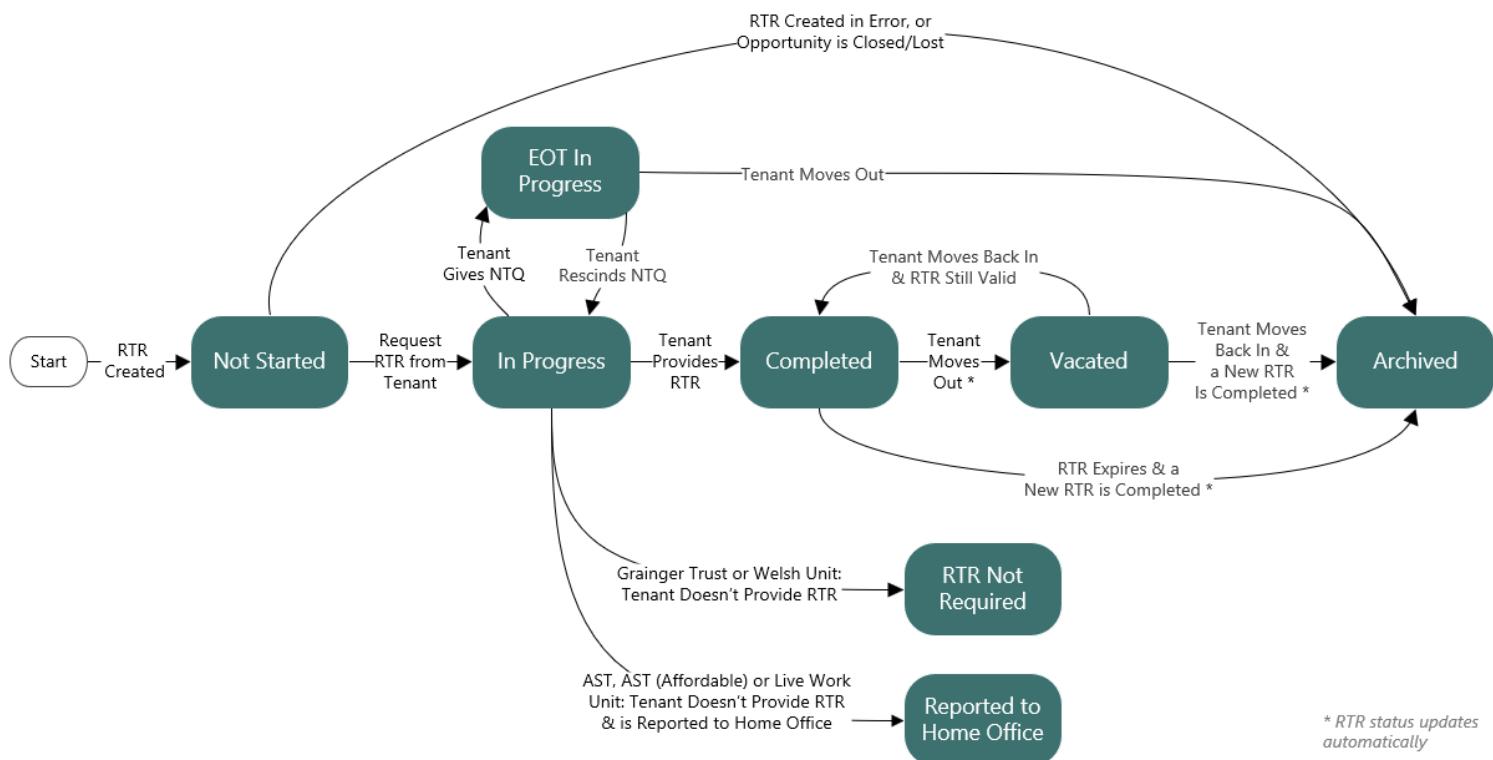
2. Right to Rent Information

Right to rent checks and documents, as well as reports to the Home Office, are captured on the Right to Rent (RTR) object in Salesforce.

The screenshot shows the Salesforce interface for the 'Right to Rent' object. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Notes, Reports, Dashboards, Calendar, Right to Rents, and More. The main area displays the details for RTR-00006496, belonging to Tenant Test Smith, with Time Limited checked, RTR Expiry on 05/11/2025, Status Completed, and Date Next RTR Required on 08/01/2026. The RTR Validity field has a green checkmark. A callout bubble points to the 'Notes (0)' section, which contains a placeholder for uploading documents or Home Office reports. Another callout bubble points to the 'Activity' timeline, stating that associated tasks and emails will be displayed. A third callout bubble points to the 'Upcoming & Overdue' section, which shows a task from the Renewal Team with no due date. The bottom section shows the 'Right to Rent History (6)' table, listing changes made by Anita Masters on various dates, such as changing the Check Date, Document Saved, RTR Expiry, Status, and Time Limited.

Date	Field	User	Original Value	New Value
08/01/2025, 14:53	Check Date	Anita Masters		08/01/2025
08/01/2025, 14:53	Document Saved	Anita Masters	<input type="checkbox"/>	<input checked="" type="checkbox"/>
08/01/2025, 14:53	RTR Expiry	Anita Masters		05/11/2025
08/01/2025, 14:53	Status	Anita Masters	Not started	Completed
08/01/2025, 14:53	Time Limited	Anita Masters	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The RTR record will progress through a sequence of **statuses**:



Not Started	<ul style="list-style-type: none"> Tenant has not been approached for their RTR.
In Progress	<ul style="list-style-type: none"> Tenant has been approached for their RTR but has not yet provided any or all required information. RTR can remain in this status while any information provided is being verified with the Home Office.
EOT in Progress	<ul style="list-style-type: none"> Tenant's RTR is expiring soon, however they have provided notice to quit or have been given notice to vacate. RTR follow-up can be paused pending the outcome.
RTR Not Required	<ul style="list-style-type: none"> Tenant in a Grainger Trust or Welsh property has not provided a RTR. These tenants are not legally required to provide RTR.
Completed	<ul style="list-style-type: none"> RTR check was successfully completed for a current tenant. System-generated reminder emails will be sent to the tenant for RTRs nearing their expiry, only when in this status.
Vacated	<ul style="list-style-type: none"> RTR check was successfully completed for a tenant who has subsequently moved out. RTR is moved to this status to prevent system-generated reminder emails being sent to former tenants.
Reported to Home Office	<ul style="list-style-type: none"> Tenant could not provide RTR and was reported to the Home Office.
Archived	<ul style="list-style-type: none"> Old RTR where a newer RTR has been received from the tenant. Also used to close RTRs created in error, or close RTRs that were never completed and are no longer required.

The **RTR status** must be kept up-to-date, and will **update automatically** in the following circumstances:

- When a new RTR record for an existing tenant is **completed**, the previous RTR for that tenant will be automatically updated to an **Archived** status.
 - I.e. When a RTR is saved with one of the following statuses: *Completed, RTR Not Required, Vacated or Reported to Home Office*, then any other RTR for the same tenant that is *Completed, RTR Not Required* or *Vacated* will update to 'Archived'.
- Once a month, IT will update any 'Completed' RTR records to a **Vacated** status if the tenant has moved out.

The following details may be captured on the RTR:

Right to Rent Information to be Captured	
Tenant	
Related Opportunity	The opportunity associated with the tenant originally moving in.
Related Unit	This does not need to be manually selected; it will automatically update on saving, based on the <i>Related Opportunity</i> .
Owner	This does not need to be manually selected; it will automatically update on saving to the relevant Onsite Property Management Team , based on the <i>Related Opportunity</i> . If there is no Onsite PM Team configured in Salesforce, the owner will default to the Renewals Team.
Status	Select the applicable status, as above.
Check Date	Date on which the RTR checks were completed. This cannot be more than 28 days before the tenant moves in. This will be validated against the move-in date for the <i>Related Opportunity</i> .
Nationality	
Time Limited	
RTR Expiry	Only applicable where RTR is time-limited
Document Type	
Additional Document Type	Some <i>Document Types</i> should be corroborated with a second document.
Document Saved	Tick this to confirm that the document(s) have been saved on the RTR. Documents are required where the RTR status is <i>Completed</i> or <i>Reported to Home Office</i> .

▼ RTR Details

Tenant	Test Smith		Nationality	Austria	
Related Opportunity	RENEWAL - 1303 Neon House - 1 Feb 2025		Time Limited	<input checked="" type="checkbox"/>	
Related Unit	1303, Neon House, 207 Chapel St, Salford, M3		RTR Expiry	05/11/2025	
Owner	The Filaments Team		Document Type	Share Code - Time Limited	
Status	Completed		Document Saved	<input checked="" type="checkbox"/>	
Check Date	08/01/2025		Last Email Reminder Sent		
Date Next RTR Required	08/01/2026		Date Last Email Sent		
RTR Validity			Next Email Reminder Due	15/10/2025	
			Manual Follow Up Date	11/12/2025	

Where sufficient information has been captured, the **RTR Validity** will be indicated:

- - Where *RTR Not Required*, is not time limited, or is still valid for more than 60 days.
- - The next RTR is due within the next 60 days.
- - The next RTR is overdue, or the tenant has been reported to the Home Office.

The following information will also display where a RTR is **time-limited**:

- **Date Next RTR Required** - This is the later of:
 - The RTR expiry date, or
 - The anniversary of the check date (i.e. 1 year after the check date).
- **Last Email Reminder Sent** – Most recent automated email sent to the tenant.
- **Date Last Email Sent** – Date on which the most recent automated email was sent.
- **Next Email Reminder Due** – The date on which the next automated email will be sent, according to the [reminder & follow up timelines](#).
 - If the date falls in the past, then the email will send tomorrow.
- **Manual Follow Up Date** – The date on which the Onsite Property Management team should start [manual follow up](#) if no response has been received from the tenant.

2.1 Where to Find RTR Information

RTR information in Salesforce can be accessed in from:

- **Person Account** – See a summary of RTR information for an individual tenant
- **Opportunity** – Users can [check RTR at new let, change of sharer, or tenancy review](#) on the opportunity which will display the most recent RTR information for each associated tenant.
- **Right to Rents menu option** – Access various list views:

The screenshot shows the top navigation bar of the Salesforce application for 'Grainger PLC'. The 'Right to Rents' menu item is highlighted with a red arrow. Below the navigation bar, there is a search bar and several buttons: 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A sub-menu for 'Right to Rents' is open, showing a list of items. The first item in the list is 'Follow Up Required'.

Right to Rent ID	Owner Alias	Related Unit	Tenant	Status	Date Next RTR ...	RTR Validity
1 RTR-00000005	The Headline Team	205, The Headline, Wellington Park Way, Leeds	Leeds	Completed	21/08/2024	Valid
2 RTR-00000010	The Headline Team	1008, The Headline, Wellington Park Way, Leeds	Leeds	In Progress	25/08/2024	Valid

2.2 Person Account

A summary of right to rent information for a tenant can be viewed on the **person account**.

- When a RTR is **completed**, marked '**RTR not Required**', or the tenant is **reported to the Home Office**, the person account will automatically reflect the latest RTR information:

The screenshot shows a 'Person Account' record for 'Person Four'. The 'Details' tab is selected. In the 'Right to Rent Information' section, there are two rows of data:

RTR Time Limited	Yes	Date Next RTR Required	30/06/2026
RTR Expiry Date	14/08/2025	Reported to Home Office	<input type="checkbox"/>
		RTR Not Required	<input type="checkbox"/>

- A list of all RTR records for the tenant can be seen on the Related tab:

The screenshot shows the 'Right to Rents' related list for the 'Test Smith' person account. A tooltip indicates that clicking the 'New' button creates a new, blank RTR for the tenant. The list displays three RTR records:

Right to Rent ID	RTR Validity	Status	Time Limited	RTR Expiry	Date Next RTR ...
1 RTR-00006496	Valid	Completed	<input checked="" type="checkbox"/>	05/11/2025	08/01/2026
2 RTR-00013970	Valid	Archived	<input checked="" type="checkbox"/>	13/01/2025	31/12/2025
3 RTR-00013969	Valid	Not started	<input type="checkbox"/>		

3. Check RTR at New Let, Change or Sharer or Tenancy Review

3.1 Checking RTR for a New Lease or Mid-Term Change

When reviewing an opportunity for a new lease, tenancy review or mid-term change, check the **Right to Rents** summary on the *Related* tab to see the latest RTR information for all tenants.

- RTR information is not displayed for permitted occupiers or other roles as it is only necessary to check the right to rent for tenants. It is therefore important to ensure that the correct **contact roles** have been selected.

The screenshot shows the Salesforce interface for an opportunity named "New Lease - Joe Bloggs - 105 North, The Forge, Newcastle". The top navigation bar includes links for Home, Leads, Tenancy Review, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, and Notes. The Opportunities tab is currently selected.

The main content area shows the "Related" tab selected. Under "Contact Roles (3)", there are three items listed:

Contact Name	Active	Role	Email	Relationship	Direct D...	Referenc...	Tenancy
Joe Bloggs	<input checked="" type="checkbox"/>	Lead Tenant	joesoap@test.com				
Donald Duck	<input checked="" type="checkbox"/>	Guarantor	dduckdummy@graingerplc.com				
Sarah Test	<input checked="" type="checkbox"/>	Tenant	sjessiman@openboxsoftware.com				

A "View All" button is located below the table.

Under "Related Opportunities (0)", a callout bubble states: "Displays all existing RTR records for **Lead Tenants & Tenants** where the RTR is not in an *Archived* status."

The "Right to Rents" section shows two records:

Right to Rent ID	RTR Validity	Tenant	Status	Time Limited	RTR Expiry	Date Next RTR Re...
1 RTR-00005376		Joe Bloggs	Not started			
2 RTR-00022545	✓	Sarah Test	Completed			

- Note that when a new opportunity is created, or when a tenant / lead tenant is added to an opportunity, the system will **automatically create a new RTR & linked task** for the tenant if:
 - The tenant does not have any RTR records, or
 - All of their RTR records have been *Archived*, or
 - Their latest *Completed* or *Vacated* RTR is time-limited and a new RTR is required before the start / move-in date of the opportunity.

3.2 Checking RTR for a Tenancy Review

When reviewing a tenancy review opportunity, RTR information can be checked in a number of places:

- **RTR Outstanding** – This can be viewed on the **Reviews in Progress** list, as well as on the opportunity, and summarises the overall RTR status for the opportunity:
 - - A new RTR is required from one or more tenants.
 - - One or more tenants have a RTR in 'RTR Not Required' status.
 - - All tenants have a RTR that is valid as at the opportunity's start date (i.e. the date of the rent increase).
 - This flag only displays for Agreement Types that require RTR information to be captured.

Deadline Date	Initial Offer Due Date	Opportunity	Account	Agreement Type	Stage	Sub Stage	COS	Arrears (Weeks Rent)	Arrears Decision	RTR Outstanding	Tenancy Issues	Days Since Last Activity	Days Since Last Offer Sent	Days Since Offer Agree
25 Aug 2025	4 Aug 2025	Tenancy Review - 2...	SVOT Manu...	AST	Send Rent Review			0.00				1		
29 Sept 2025	8 Sept 2025	Tenancy Review - 1...	khonani Tes...	Occupation Contract	Documents Sent			0.00				7		
9 Apr 2027		Tenancy Review - 1...	Sarah Test	Affordable	Documents Sent			0.00				7	7	
30 May 2027		Tenancy Review - 1...	Jacob SMS ...	Occupation Contract	Rent Review Agreed			0.00				7	7	
30 May 2027		Tenancy Review - 1...	Jacob SMS ...	AST	Rent Review Agreed			0.00				0	1	

- **Contact Roles** – The **RTR Status** displays for each individual tenant and lead tenant. The RTR status is relative to the opportunity's start date (i.e. the date of the rent increase).
- **Right to Rents** summary on the *Related* tab - Displays the latest RTR records for all tenants.

The screenshot shows two main sections of the Salesforce interface:

- Contact Roles (5)**: A table showing tenant roles and their RTR status. A callout box explains: "RTR status for each **Lead Tenant & Tenant** relative to the date of rent increase." The RTR Status column includes categories: Valid, New RTR Required, RTR Not Required, and Not Obtained.

Contact Name	Active	Role	Relationship	RTR Status	Email
Donald Duck	<input checked="" type="checkbox"/>	Guarantor		Valid	dduckdummy@graingerplc.com
Sarah Test	<input checked="" type="checkbox"/>	Tenant		New RTR Required	sjessiman@openboxsoftware.com
Person Four	<input checked="" type="checkbox"/>	Tenant		RTR Not Required	sarahjessiman4@gmail.com
Person One	<input checked="" type="checkbox"/>	Tenant			one@mail.com
Joe Bloggs	<input checked="" type="checkbox"/>	Lead Tenant		Not Obtained	joesoap@test.com

- Right to Rents**: A table showing RTR records for tenants. A callout box explains: "Displays all existing RTR records for **Lead Tenants & Tenants** where the RTR is not in an *Archived* status." The table includes columns for Right to Rent ID, Tenant, Status, Time Limited, RTR Expiry, and Date Next RTR Required.

	Right to Rent ...	RTR Validity ↑	Tenant	Status	Time Limited	RTR Expiry	Date Next RTR Required
1	<input type="checkbox"/> RTR-00005376		Joe Bloggs	Not started			
2	<input type="checkbox"/> RTR-00022518		Person One	RTR Not Required			
3	<input type="checkbox"/> RTR-00022545		Sarah Test	Completed			
4	<input type="checkbox"/> RTR-00022619		Person Four	Completed	<input checked="" type="checkbox"/>	14 Aug 2025	30 Jun 2026

3.3 Completing an Opportunity

- i** A residential opportunity will be prevented from moving to the **Audit** stage until **all tenants have a valid RTR**.
- This check will be applied to all opportunity's for AST, AST (Affordable), Assured, DMR, DMR Social or Live Work agreement types.
 - Each tenant must have a RTR that is either:
 - Not time-limited and in a 'Completed' status, or
 - Time-limited, in a 'Completed' status and the *Date Next RTR Required* is after the opportunity's *Start Date*, or
 - For tenants in Wales & Grainger Trust units **only**: In a 'RTR Not Required' status.

4. Automated Email Reminders

Where a **time-limited** RTR is approaching its expiry date, Salesforce will automatically send the tenant a series of reminder emails according to the below schedule. Reminder emails are sent each morning.

- ① Reminder emails will only be sent where the RTR is in a '**Completed**' status.

If RTR Expires before Check Date Anniversary

21 days before Expiry Date	Reminder Email 1
14 days before Expiry Date	Reminder Email 2
10 days before Expiry Date	Reminder Email 3
60 days before Check Date Anniversary	Reminder Email 4
42 days before Check Date Anniversary	Reminder Email 5
30 days before Check Date Anniversary	Final Reminder Email
28 days before Check Date Anniversary	Start Manual Follow Up

If RTR Expires after Check Date Anniversary

21 days before Expiry Date	Reminder Email 1
14 days before Expiry Date	Reminder Email 2
10 days before Expiry Date	Final Reminder Email
7 days before Expiry Date	Start Manual Follow Up

The screenshot shows the Salesforce interface for a Right to Rent (RTR) record. At the top, there's a navigation bar with links like Home, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Tasks, Notes, Reports, Dashboards, Calendar, Right to Rents, and More. Below the navigation is a header for 'Right to Rent' with the ID 'RTR-00006787'. The main area displays 'RTR Details' for Tenant 'Test Smith', with fields for Time Limited (checked), RTR Expiry (17/01/2025), Status (Completed), Date Next RTR Required (02/12/2025), and RTR Validity (green checkmark). A note indicates 'RTR Validity' is checked. The 'Next Email Reminder Due' is listed as 07/01/2025, and 'Manual Follow Up Date' is 04/11/2025. A callout box highlights these dates with the text: 'Next Email Reminder Due date & Manual Follow Up Date are calculated according to the above timelines.' To the right, an 'Activity' section shows a list of recent emails with a note: 'Automated reminder emails sent & any direct replies will display here. Click on the email subject line to see attachments.' Below the RTR details, there's a 'Right to Rent History' section showing a table of historical events.

4.1 Tenant Replies

If a **tenant replies** to an automated reminder email:

- The RTR record **owner** will receive an **email notification** of the reply.
 - The email can be sent to a shared mailbox for the relevant team, otherwise
 - Each member of the team will receive an notification email.
- The reply can be viewed in the RTR activity timeline (as above).

4.2 Bounced Emails

If an automated reminder **email bounces**:

- The RTR record owner will receive an email notification.
- Automated reminder **emails will no longer be sent** to the tenant.

Person Account
Malcom Test

Phone (2) ▾ Email
1234567890 smallm123@openboxsoftware.com

Email bounced. Update the email address and try again.

If the tenant's email is subsequently updated, the automated reminder email sending will resume.

- ⚠️** Not all invalid email addresses will result in a bounced email notification.
It is important to ensure all tenant's emails on Salesforce are correct and up-to-date.

5. Manual Follow Up

A list of RTRs that need to be worked on can be accessed under the *Right to Rents* menu option, in the **Follow Up Required** list.

This list displays:

- All **incomplete** RTR records (i.e. in status *Not Started*, *In Progress* or *EOT in Progress*).
- All completed RTRs that are expiring soon and require **manual follow up** (see [Reminder & Follow Up Timelines](#)).

Right to Rent ID	Owner Alias	Related Unit	Tenant	Status	Date Next RTR Required	RTR Validity
RTR-00000704	Abbeville Apartments	Apt 212, Abbeville Apts, 37 London Rd, Barkin	Sajana Varghese	Completed	21/11/2024	Flag
RTR-00000705	Abbeville Apartments	Apt 212, Abbeville Apts, 37 London Rd, Barkin	Ajeesh Jose Prakash	Completed	21/11/2024	Flag
RTR-00001209	Abbeville Apartments	Apt 201, Abbeville Apts, 37 London Rd, Barkin	Kalyan Sannamalay	Completed	04/01/2025	Flag
RTR-00001210	Abbeville Apartments	Apt 201, Abbeville Apts, 37 London Rd, Barkin	Indrani Pardakajha	Completed	04/01/2025	Flag
RTR-00001435	Abbeville Apartments	Apt 611, Abbeville Apts, 37 London Rd, Barkin	Pavan Kumar Prabhu	Completed	18/01/2025	Flag
RTR-00001436	Abbeville Apartments	Apt 611, Abbeville Apts, 37 London Rd, Barkin	Pravinkumar Patel	Completed	18/01/2025	Flag
RTR-00001673	Abbeville Apartments	Apt 309, Abbeville Apts, 37 London Rd, Barkin	Sukhdev Singh	In Progress	14/04/2025	Flag
RTR-00001674	Abbeville Apartments	Apt 309, Abbeville Apts, 37 London Rd, Barkin	Wanyu Parikh	EoT In Progress	14/04/2025	Flag