

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.

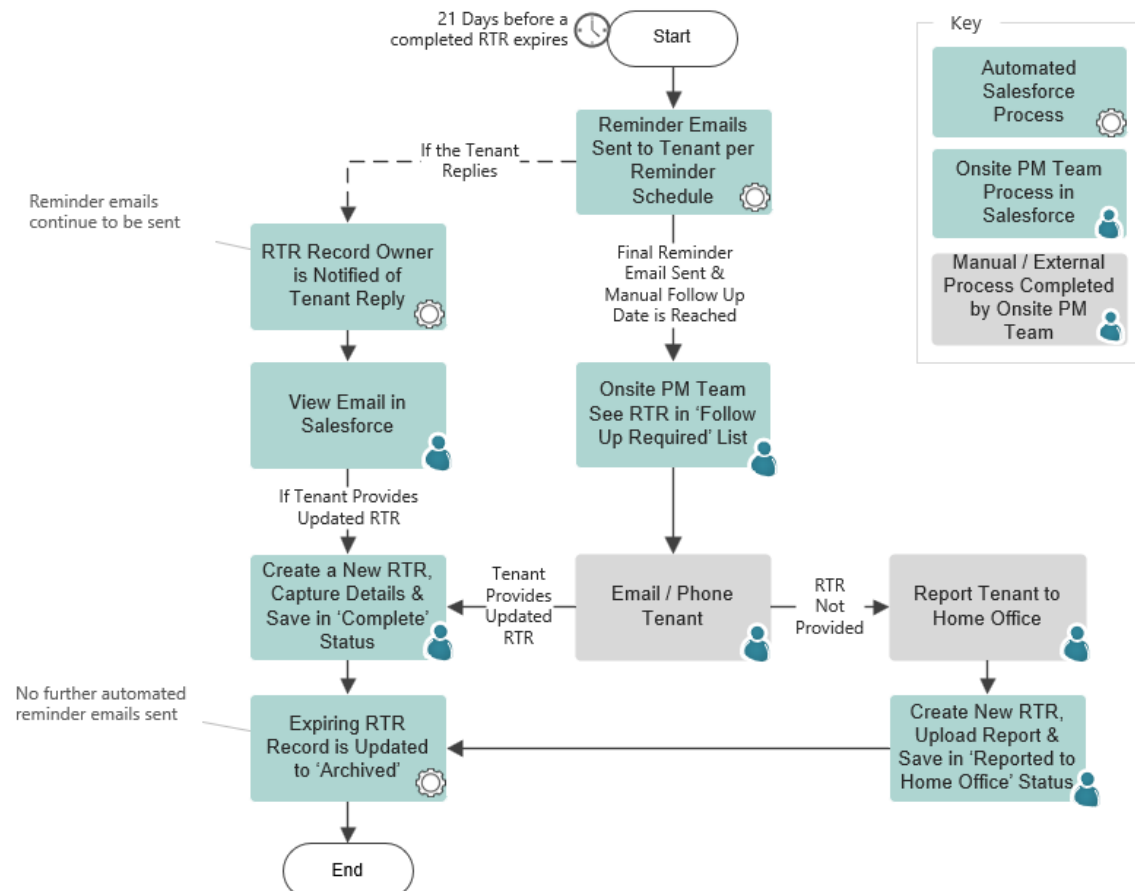
While tenants in Wales, in social housing or in accommodation provided by a local authority are not required to provide a right to rent, it is Grainger policy to request this documentation. However, failure to provide it should not impede a new let or renewal for these tenants.

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.

Right to Rent
RTR-00006496

Tenant: Test Smith | Time Limited: ☒ | RTR Expiry: 05/11/2025 | Status: Completed | Date Next RTR Required: 08/01/2026 | RTR Validity: ☒

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	<input checked="" type="checkbox"/>	Next Email Reminder Due	
		Manual Follow Up Date	

Right to Rent History (6)

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"/>

Notes (0)

Files (0)
Upload Files
Or drop files

Activity
Upcoming & Overdue
Complete Right to Rent check
Renewal Team has an upcoming task
No due date

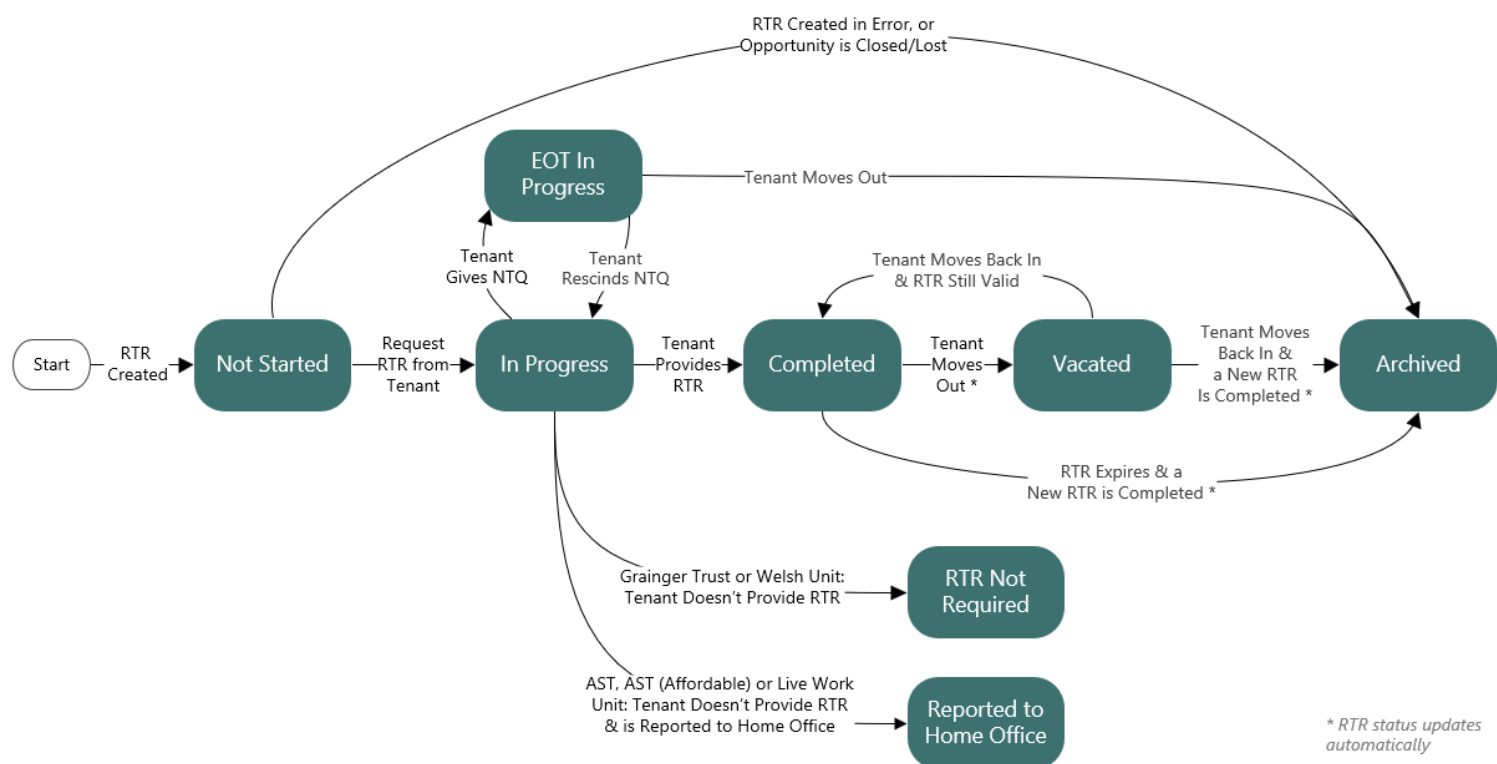
No past activity. Past meetings and tasks marked as done show up here.

Upload any documents provided or Home Office report.

View a history of all updates to key fields.

Associated tasks & emails will display in the activity timeline.

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

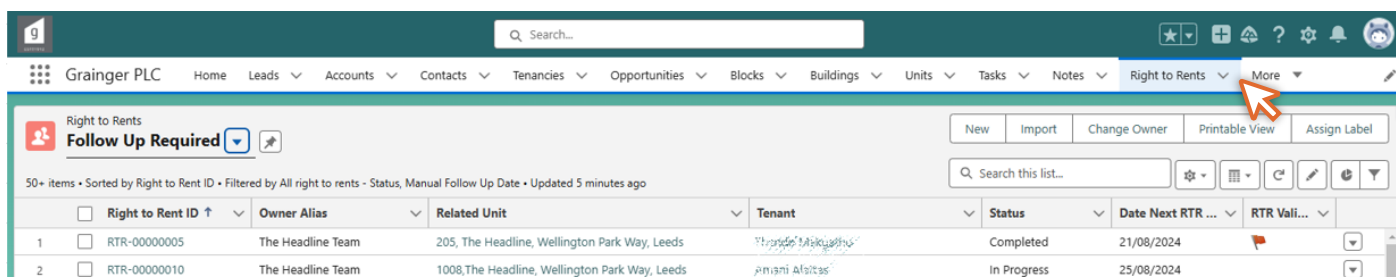
The follow information will also display where a RTR is **time-limited**:

- **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:

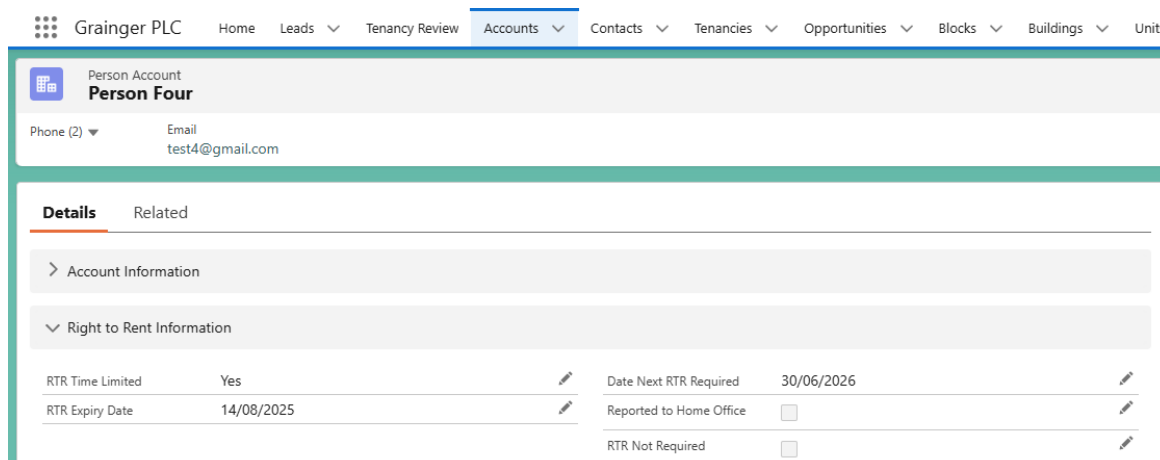


<input type="checkbox"/>	Right to Rent ID ↑	Owner Alias	Related Unit	Tenant	Status	Date Next RTR ...	RTR Validity
<input type="checkbox"/>	RTR-00000005	The Headline Team	205, The Headline, Wellington Park Way, Leeds	Private Allocations	Completed	21/08/2024	
<input type="checkbox"/>	RTR-00000010	The Headline Team	1008, The Headline, Wellington Park Way, Leeds	Private Allocations	In Progress	25/08/2024	

2.2 Person Account

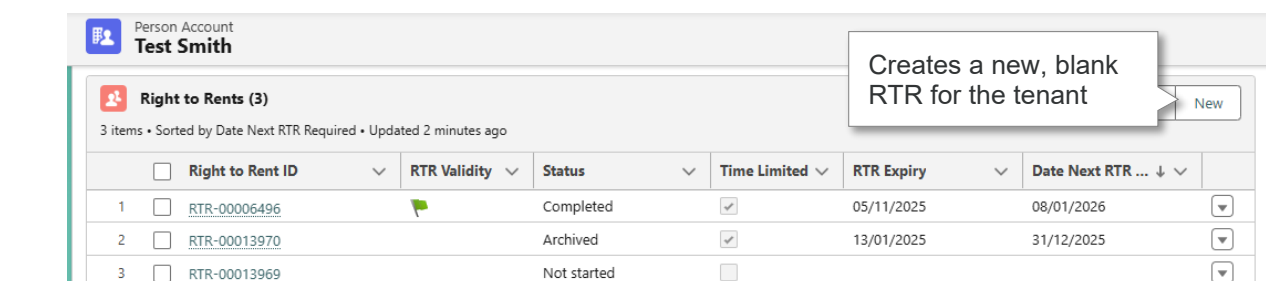
A summary of right to rent information for a tenant can be viewed on the [person account](#).

- 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:



Details		Related	
Account Information			
Right to Rent Information			
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:



<input type="checkbox"/>	Right to Rent ID	RTR Validity	Status	Time Limited	RTR Expiry	Date Next RTR ...
<input type="checkbox"/>	RTR-00006496		Completed	<input checked="" type="checkbox"/>	05/11/2025	08/01/2026
<input type="checkbox"/>	RTR-00013970		Archived	<input checked="" type="checkbox"/>	13/01/2025	31/12/2025
<input type="checkbox"/>	RTR-00013969		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 displays the Salesforce interface for an opportunity titled "New Lease - Joe Bloggs - 105 North, The Forge, Newcastle". The "Related" tab is active, showing a list of contact roles and a summary of Right to Rents (RTR) records.

Contact Roles (3)

Contact Name	Active	Role	Email	Relationship	Direct D...	Referenc...	Tenancy
1 Joe Bloggs	✓	Lead Tenant	joesoap@test.com				
2 Donald Duck	✓	Guarantor	dduckdummy@graingerplc.com				
3 Sarah Test	✓	Tenant	sjessiman@openboxsoftware.com				

Related Opportunities (0)

Displays all existing RTR records for **Lead Tenants & Tenants** where the RTR is not in an *Archived* status.




Right to Rents

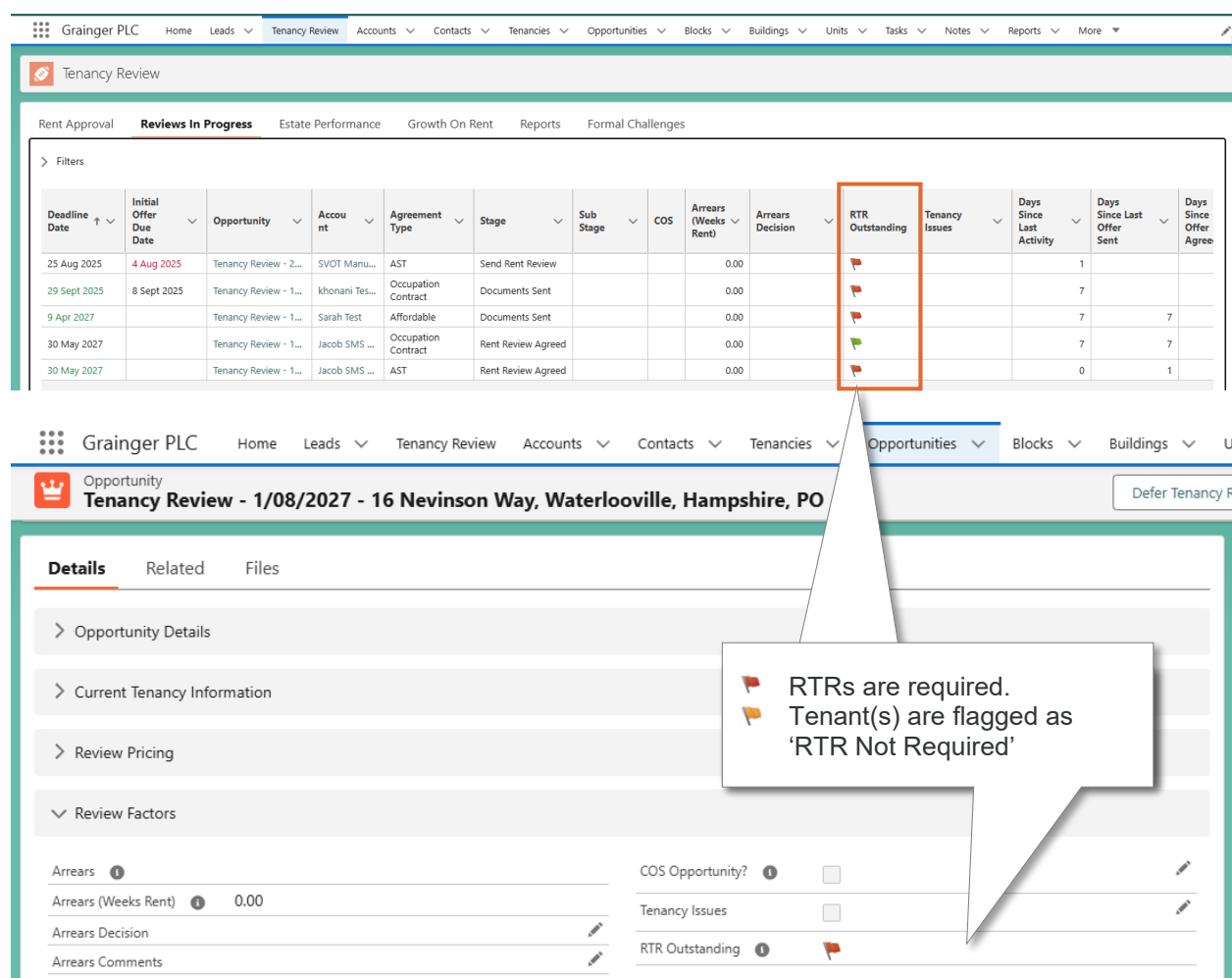
Right to Rent ID	RTR Validity	Tenant	Status	Time Limited	RTR Expiry	Date Next RTR Re...
1 RTR-00005376		Joe Bloggs	Not started			
2 RTR-00022545		Sarah Test	Completed			

- 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.



The screenshot displays the 'Tenancy Review' section of the Grainger PLC system. The top navigation bar includes links for Home, Leads, Tenancy Review, Accounts, Contacts, Tenancies, Opportunities, Blocks, Buildings, Units, Tasks, Notes, Reports, and More. The main content area shows a 'Reviews in Progress' list with columns for 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, and Days Since Offer Agree.

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	

The detailed view of the opportunity 'Tenancy Review - 1/08/2027 - 16 Nevinson Way, Waterlooville, Hampshire, PO' shows the following details:

- Details** (Selected), Related, Files
- Opportunity Details**
- Current Tenancy Information**
- Review Pricing**
- Review Factors**
 - Arrears: 0
 - Arrears (Weeks Rent): 0.00
 - Arrears Decision
 - Arrears Comments
 - COS Opportunity? ☐
 - Tenancy Issues ☐
 - RTR Outstanding ☒ 

A callout box points to the 'RTR Outstanding' status, stating: "RTRs are required. Tenant(s) are flagged as 'RTR Not Required'".

- **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.

Grainger PLC Home Leads Tenancy Review Accounts Contacts Tenancies Opportunities Blocks Buildings Ur

Opportunity
Tenancy Review - 1/08/2027 - 16 Nevinston Way, Wat

Contact Roles (5)
5 items • Sorted by Role • Updated a few seconds ago

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

View All

Related Files

Right to Rents

<input type="checkbox"/>	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	Valid	Person One	RTR Not Required			
3	<input type="checkbox"/> RTR-00022545	Valid	Sarah Test	Completed			
4	<input type="checkbox"/> RTR-00022619	Valid	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.

i 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

Grainger PLC Home Leads Accounts Contacts Opportunities Blocks Buildings Units Tasks Notes Reports Dashboards Calendar Right to Rents More

Right to Rent
RTR-00006787

Tenant: Test Smith | Time Limited: ☒ | RTR Expiry: 17/01/2025 | Status: Completed | Date Next RTR Required: 02/12/2025 | RTR Validity:

RTR Details

Tenant	Test Smith	Nationality	United Kingdom
Related Opportunity	Renewal 418, Solstice Apts, Silbury Boulevard 2024-01-11	Time Limited	<input checked="" type="checkbox"/>
Related Unit	418, Solstice Apts, Silbury Boulevard	RTR Expiry	17/01/2025
Owner	Solstice Apartments Team	Document Type	Share Code - Time Limited
Status	Completed	Document Saved	<input checked="" type="checkbox"/>
Check Date	02/12/2024	Last Email Reminder Sent	Reminder Email 2
Date Next RTR Required	02/12/2025	Date Last Email Sent	13/01/2025
RTR Validity		Next Email Reminder Due	07/01/2025
		Manual Follow Up Date	04/11/2025

Right to Rent History (6+)

Date	Field	Value
10/01/2025, 11:54	Status	
10/01/2025, 11:51	Status	
10/01/2025, 11:14	RTR Expiry	
10/01/2025, 11:14	Time Limited	
02/12/2024, 15:32	Check Date	Helen Douglas-Teggart 02/12/2024

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

January - 2025

This Month

- RE: Sandbox: 418, Solstice Apts, Silbury Boulevard... 10:15 | Today
npapenfus@openboxsoftware.com sent an email to right_to_rent_uat@2cer...
- 418, Solstice Apts, Silbury Boulevard: Right to Rent C... 10:13 | Today
sf-admin-grainger+uat@openboxsoftware.com sent an email to ...

Automated reminder emails sent & any direct replies will display here. Click on the email subject line to see attachments.

Next Email Reminder Due date & Manual Follow Up Date are calculated according to the above timelines.

4.1 Tenant Replies

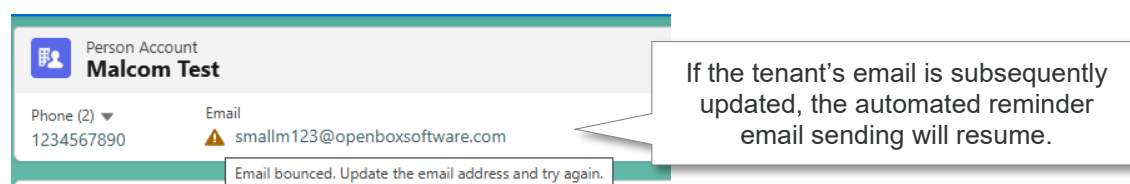
If a **tenant replies** to an automated reminder email:

- 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.



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](#)).

<div> <div>Grainger PLC</div> <div> Home Leads Accounts Contacts Opportunities Blocks Buildings Units Tasks Notes Reports Right to Rents More </div> </div>									
<div> <div>Right to Rents</div> <div>Follow Up Required</div> <div> <div>New</div> <div>Change Owner</div> <div>Printable View</div> </div> </div>									
<div> <div>50+ items • Sorted by Owner Alias • Filtered by All right to rents - Status, Manual Follow Up Date • Updated 2 minutes ago</div> <div> <div>Search this list...</div> <div> <div>Settings</div> <div>Grid</div> <div>Refresh</div> <div>Print</div> <div>Filter</div> </div> </div> </div>									
<input type="checkbox"/>	Right to Rent ID	Owner Alias	Related Unit	Tenant	Status	Date Next RTR Required	RTR Validity		
<input type="checkbox"/>	RTR-00000704	Abbeville Apartments	Apt 212, Abbeville Apts, 37 London Rd, Barkin	Sajana Varghese	Completed	21/11/2024			
<input type="checkbox"/>	RTR-00000705	Abbeville Apartments	Apt 212, Abbeville Apts, 37 London Rd, Barkin	Ajeesh Jose Prakash	Completed	21/11/2024			
<input type="checkbox"/>	RTR-00001209	Abbeville Apartments	Apt 201, Abbeville Apts, 37 London Rd, Barkin	Kalyan Sannamsetty	Completed	04/01/2025			
<input type="checkbox"/>	RTR-00001210	Abbeville Apartments	Apt 201, Abbeville Apts, 37 London Rd, Barkin	Indrani Perikakotla	Completed	04/01/2025			
<input type="checkbox"/>	RTR-00001435	Abbeville Apartments	Apt 611, Abbeville Apts, 37 London Rd, Barkin	Pavan Kumar Prabhya	Completed	18/01/2025			
<input type="checkbox"/>	RTR-00001436	Abbeville Apartments	Apt 611, Abbeville Apts, 37 London Rd, Barkin	Priyanka Prakash Bala...	Completed	18/01/2025			
<input type="checkbox"/>	RTR-00001673	Abbeville Apartments	Apt 309, Abbeville Apts, 37 London Rd, Barkin	Sukhdeep Singh	In Progress	14/04/2025			
<input type="checkbox"/>	RTR-00001674	Abbeville Apartments	Apt 309, Abbeville Apts, 37 London Rd, Barkin	Nany's Pannu	EoT in Progress	14/04/2025			