

Step by Step Guide to Mutual Exchanges

- Step 1 Full and completed application forms must be received from all parties wishing to Mutually Exchange and must be date stamped and logged on to the Mutual Exchange Register.
- Step 2 Letter 1 acknowledging receipt will be sent to all applicants, indicating the date that all applications were received. It is from this date that the 6 week deadline for decision is set.
- Step 3 The 6 week deadline date is entered onto the Mutual Exchange Register.
- Step 4 The responsible Housing Officer will then check eligibility. If the application is to be refused for any reason at this stage, letter 2 will be sent. This letter explains the reasons for refusal. (Remember- Probationary Tenancies, still within the initial probationary period or an extended period).
- Step 5 If there is an applicant from another RSL or local authority, the responsible Housing Officer will contact the relevant organisation and briefly talk through the application with their responsible officer, and follow this contact with letter 3, enclosing the Mutual Exchange Questionnaire.
- Step 6 Upon receipt of the completed questionnaire, the responsible Housing Officer will write to the Company's applicant(s) with letter 4 if the other RSL or local authority is refusing the application, or if their completed questionnaire gives cause for the application to be refused, or letter 5 if there is no problem.
- Step 7 The responsible Housing Officer will contact the Company's applicant(s) to arrange an appointment to inspect their property.
- Step 8 The responsible Housing Officer will inspect the property or properties using the Property Inspection Form.
- Step 9 The responsible Housing Officer will write to both the tenant and the applicant wishing to move to the property, highlighting the findings of the inspection, using letters 6 and 7.
- Step 10 If one or more applicants are from another RSL or local authority, the responsible Housing Officer will complete and send off a Tenancy Report to the relevant landlord.
- Step 11 Once the exchange is approved, letter 8 is issued to all parties concerned with an Acceptance Form to be returned to the office.
- Step 12 Once a mutually agreed date for the exchange is set, the responsible Housing Officer will arrange for a gas and electrical safety check at each property, with the certificates awarded to the office. These safety certificates would be copied for the house file, with the original issued to the incoming applicant.

- Step 13 At this point the responsible Housing Officer will send letter 9 to the outgoing tenant
- Step 14 The responsible Housing Officer will then create a sign up pack which will include:
- A copy of all letters relating to the mutual exchange;
 - Licence to Assign;
 - Deed of Assignment;
 - Blank relevant Tenancy Agreement;
 - Direct Debit form;
 - Housing Benefit authorisation form;
 - Housing Benefit change of circumstances form; and
 - The Company sign up pack.
- Step 15 The responsible Housing Officer will obtain signatures from the outgoing tenant.
- Step 16 The responsible Housing Officer will then sign up the incoming tenant. This should be at the property, if possible.
- Step 17 The responsible Housing Officer will arrange a mutually convenient date for the 6 weekly courtesy visit.
- Remember All correspondence will be filed on the house file within 5 days of the exchange being completed.
- Remember Information will be recorded on UHM throughout to keep everyone within the Company informed. This will be done within one day of receipt or issue of the information.