



HomeSwapper®

Pre-Tenancy Financial Assessments

If you're a Mutual Exchange Officer Plus user then you'll have access to our Pre-Tenancy Financial Assessments (PTFAs) feature in HomeSwapper.

What's included in a PTFA?

A PTFA will give you:

- A risk indicator for the tenant
- The tenant's level of debt and delinquent debt
- All public information associated with the tenant
- CAIS data for the tenant
- Current address confirmation
- Credit search history
- Associate links

What are the benefits of PTFAs?

PTFAs allow you to run financial assessments on new tenants to:

- Confirm they are who they say they are
- Understand more about their financial situation
- Identify if support programmes need to be put in place
- Understand any risks involved in offering the tenancy
- Drive informed conversation with the tenant

How to run PTFAs



To find the Pre-Tenancy Financial Assessments feature on your HomeSwapper dashboard, hover over the 'Tenants' menu option and select 'Pre-tenancy financial assessment'.

You'll then be on the Pre-tenancy financial assessment screen. These are run through our TAIM SafeStart system.

To the left of the screen you can enter the tenant's details and to the right you'll be able to check the number of PTFA credits you have remaining.

Once you've completed the key details for the tenant that you'd like to run a PTFA on, click on 'Run financial assessment'.

A screenshot of the 'SafeStart Pre-tenancy financial assessment' form. The form has a three-step progress indicator: 1. Enter details, 2. Confirm & Save, 3. Results. Below the indicator, it says 'To run a check please fill in the person's details below:'. The form fields are: First name (Judith), Last name (Boatwright), Date of birth (30, October, 1965), and Postcode (CF14 4HX). There is a 'Find address' button and a link 'Enter address manually'. At the bottom, there is a 'Run financial assessment' button. The background features a stylized illustration of houses.

Need to knows

1. It is essential that you have the prospective tenant's consent before running a check. We recommend adding a statement to your Tenancy Application that you will undertake pre-tenancy checks.
2. A PTFA leaves a hard footprint that shows the name of your organisation on the tenant's credit file, visible to the tenant and any lender.
3. PTFAs are a paid-for add on service within HomeSwapper, so if you need to buy more credits please get in touch by:

Email: landlords@homeswapper.co.uk

Phone: 0845 618 7162