Read This First

This page is for you. It explains why a key holding form matters and how to use it.

Why this matters

Holding a client's keys is the moment they decide to trust you completely. It is also the moment you take on real responsibility: for their property, their security, and what happens if a key is lost.

A key holding form does three things. It records exactly what you hold and when you got it, so there is no confusion later. It sets out how you look after keys, which reassures the client and protects you. And it tells both of you what happens if something goes wrong, before it does.

Some insurers ask how you manage keys. Being able to show a signed record for every key you hold is a good answer.

How to use this kit

- **Page 2** is the Key Holding Agreement. Fill it in with the client when they hand over keys or give you access details. Both of you sign it. Give them a copy, or a photo of it.
- **Page 3** is your Key Register: one line per key you hold across all clients. Keep it somewhere secure at home, away from the keys themselves.
- Give every key a tag with a code (K01, K02) and nothing else. Never the client's name, address or anything that would identify the property if the key were lost.
- When a key is returned, write the date on both the agreement and the register, and ask the client to initial it.

Handling keys well

- **Store them securely.** A lockable box or safe at home, not a bag in the car or a hook by the door.
- **Keep codes separate from keys.** Alarm codes, key safe codes and gate codes should never be written on the key tag or on the same sheet as the address. This form deliberately records that a code exists and that you hold it separately, not the code itself.
- **Do not copy keys** without the client's written permission.
- **Lock up as instructed.** Every time. If you cannot secure the property when you leave, tell the client immediately.
- **Return them promptly** when the arrangement ends, in person or by recorded delivery, and record the date.

If a key is lost

Tell the client the same day, even if you think it will turn up. Offer to cover the cost of a lock change if the key cannot be found. Check your insurance policy: some public liability policies cover lost keys and lock replacement and some do not, and it is better to know before it happens.

Your data protection responsibilities

Client names, addresses and access details are personal data. Keep completed forms secure, only record what you need, and delete or destroy them when you no longer hold that client's keys. Depending on how you process personal data, you may need to register with the Information Commissioner's Office (ICO). Their guidance for small businesses is short and worth reading.

A note on this kit

This is a general template, not legal advice or a substitute for your insurance terms. If you hold keys for many properties or for commercial clients, it is worth getting your key handling procedure checked.

If you use Clarito, access notes for each client are stored on their record and available on your phone at every visit, so you never have to ask twice or carry a paper file.

Key Holding Agreement

Complete together when keys or access details are handed over. Both sign. Client keeps a copy.

Cleaner

Name: _____

Business name: _____

Phone: _____

Client

Name: _____

Property address: _____

Phone: _____

Keys held

Key tag	Description (e.g. front door Yale, back door, garage)	Copies	Date received	Date returned

Key tags carry a code only, never a name or address.

Other access

Key safe: ☐ None ☐ Yes, code held separately by cleaner

Key safe location: _____

Alarm: ☐ None ☐ Yes, code held separately by cleaner

Alarm instructions (not the code): _____

Gate or entry code: ☐ None ☐ Yes, held separately by cleaner

Other entry instructions: _____

Lock up instructions when leaving: _____

Agreed by both

- The cleaner will keep keys in a secure locked place, labelled by code only, and will not copy them or pass them to anyone else without the client's written permission.
- Codes are kept separately from keys and from this form, and are never written on key tags.
- The cleaner will secure the property as instructed on leaving, and will tell the client the same day if there is any problem with access, locks or security.
- If a key is lost, the cleaner will tell the client the same day and will _____ (e.g. cover the cost of a lock change).
- The client will tell the cleaner straight away if locks, codes or access arrangements change.
- Keys will be returned within _____ of the arrangement ending, and the return date recorded above.

Cleaner signed: _____ **Client signed:** _____

Date: _____ **Date:** _____

Key Register

One line per key you hold, across all clients. Keep this somewhere secure, away from the keys.

Business name: _____ **Where keys are stored:** _____

Tag	Client	Key description	Copies	Received	Returned	Client initials

Review this register every few months. Any key for a client you no longer clean for should have been returned and dated.