

MODEL FORM

Use Checklist to Cover All Bases During Resident Orientation

The following is a model resident orientation checklist that includes briefing topics recommended by HUD, as well as additional items you may want to cover. You can use it as a template to develop a form for your site, which should include your site's policies, how to communicate with site

management and maintenance, key lease provisions, and tax credit compliance requirements. Residents should initial each item as it is explained to them, as well as sign and date the form. Be sure to have your attorney review your checklist before using it at your site.

RESIDENT ORIENTATION CHECKLIST

RESIDENT CONTACT INFORMATION

NAME _____ MOVE-IN DATE _____
ADDRESS _____
TEL. # _____ EMAIL _____

LEASE TERMS

_____ Lease starting date
_____ Lease ending date
_____ Resident must give 30-day written notice prior to moving out of unit

LIHTC PROGRAM REQUIREMENTS

_____ Annual unit inspection
_____ Annual student status verification
_____ Annual recertification (mixed-use sites)
_____ Reporting requirements for household composition, status, income changes (mixed-use sites)
_____ Unauthorized occupants
_____ Unit transfer policy

RENT

_____ Household rent amount
_____ Rent due date
_____ Late rent fee
_____ Returned check fee

SECURITY DEPOSIT

_____ Security deposit amount
_____ Security deposit due date
_____ Security deposit policy (how deductions will be made, how interest will be paid)

HOUSE RULES

_____ Criminal activity/ drug abuse
_____ Disturbance of neighbors
_____ Destruction of property
_____ No-smoking policy
_____ Visitor policy
_____ Smoke detector policy
_____ Common areas
_____ Installation of appliances without owner approval

PET RULES

_____ Pet deposit
_____ Pet control/lease requirements
_____ Pet waste removal

HOUSEKEEPING

_____ Preventing/cleaning mold
_____ Trash disposal
_____ Keeping the unit in habitable condition

TERMINATION OF TENANCY

_____ Grounds for termination of tenancy
_____ Notice to terminate
_____ Owner must advise residents of their rights

COMMENTS & QUESTIONS

PRINT NAME _____

SIGNATURE _____ DATE _____