

Leasing Checklist: APT: _____

RESIDENT(S): _____

OCCUPANT (S): _____

APPLICATION SUBMITTED DATE: _____ LEASE START DATE: _____ END DATE: _____

RENT: _____ OTHER FEES: _____ TOTAL: _____ PRORATE: _____

Verify/Assign leasing agent credit in Yardi/CRM BEFORE executing the lease: _____

CREDIT & BACKGROUND CHECK: ACCEPT _____ CONDITIONAL _____ DENIAL _____

CONDITIONAL: ADDITIONAL DEPOSIT _____ AMOUNT: _____ GUARANTOR REQUIRED _____

INCOME VERIFICATION: WORK NUMBER _____ NOVA VOI _____ MANUAL VERIFICATION _____

LEASING

- _____ Verify Income
- _____ Approve Or Deny Application
- _____ Update applicant of application status
- _____ Generate & send lease in CRM (Send same day as approval)
- _____ Send the welcome letter with move-in cost/ requirements
- _____ Countersign lease once signed
- _____ Inspect Apartment
- _____ Prepare welcome packet/folder and keys

MOVE-IN DAY

- _____ Collect move-in \$/ Account #'s/ Renters Insurance (Place on the master policy if they do not provide renters insurance)
- _____ Update renters insurance interface in Yardi
- _____ Verify lease charges and post move in

AFTER MOVE IN

- _____ Verify deposits & lease charges
- _____ Verify that the ledger is correct
- _____ Enter Demographics (Requirements below)

Email

Phone number

Date of birth

SS Number/ TIN/Government-Issued I.D #

- _____ Check-in/check-out form completed
- _____ Verify all documents uploaded in Yardi

ELECTRIC: _____

GAS: _____

DOCUMENT LIST

Document	Uploaded	Verified
1 GOVERNMENT-ISSUED I.D		
2 RESIDENT SELECTION CRITERIA		
3 APPLICATION		
4 GURANTOR APPLICATION (if applicable)		
5 INCOME VERIFICATION (If completed Manually)		
6 RESIDENTIAL LEASE		
7 SANDALWOOD INSURANCE ADDENDUM		
8 INSURANCE POLICY (Must include all leaseholders)		
9 CHECK IN CHECK OUT FORM		
10 LEASING CHECKLIST		

LEASE FILE/CHECKLIST REVIEW

DATE

INITIAL

LEASING AGENT: _____

MANAGER: _____

CHECKLIST UPLOADED: _____

FILE SHREDDED: _____