

Rental Policies and Procedures

Sample



NALP National Apartment Leasing Professional

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Sample



Message to Apartment Leasing Professionals

This education program was developed by Leasing, Operations, Marketing and Training Professionals working in the multifamily housing industry across the nation.

It was developed and revised at the request of Leasing Professionals and apartment association members, like you, who told us what they need to successfully perform their job responsibilities. It was also developed at the request of your managers, supervisors, owners and employers. They asked for this program because of your importance to the industry. They recognize you as the key to leasing, renewing and serving future and current residents of your communities and buildings.

This is one of a series of eight courses of the National Apartment Leasing Professional (NALP) designation program. The other courses, in addition to this course, are as follows:

1. Keys to Success in Leasing
2. Telephone Presentations
3. Leasing and the Internet
4. The Leasing Interview
5. Leasing Demonstration & Follow-Up
6. Rental Policies and Procedures
7. Legal Aspects
8. The Market Survey

For more information about this program or any of NAAEI's education programs, ask your instructor, contact your local apartment association, or contact NAAEI at 703/518-6141.

Course Objectives

At the end of this course, students will be able to:

- ▶ Effectively complete a rental application;
- ▶ Apply correct procedures in verifying a rental application;
- ▶ Describe the key elements in apartment home contracts;
- ▶ Successfully complete a lease agreement;
- ▶ Identify tools and activities that help orient a new resident to the apartment community on move-in day; and
- ▶ Recognize the fair housing implications related to the processing of rental paperwork and policies.

Sample

Policies and Procedures Opening Remarks

Up to the point where the prospect accepts the Leasing Professional's personal invitation to join the apartment community, the emphasis has been on getting to know the prospect's needs, matching the community's features to the prospect's wants and leasing in general.

Once the prospect makes a verbal commitment to lease, the Leasing Professional adds administration to the focus and becomes someone responsible for taking care of the many details that must be addressed before the prospect becomes a resident.

This added role should be seamless; that is, the prospect should not notice any difference in the Leasing Professional's behavior. The conversational tone should remain professional and upbeat. The Leasing Professional continues to find out about the new resident so that the company can provide the level of service needed and expected.

This part of your job description is viewed by the customer as your commitment to delivering what was promised. The ease of this process will set the tone for the new resident's expectation of service in the future. Continue to use your relationship and rapport building skills as the prospect transitions to resident. Remember, you never get a second chance to make a first impression!

This program helps students learn how to smoothly transition the prospect into a resident. It deals with the apartment community's rental policies and procedures, the application and leasing procedures, the move-in process, and providing new resident service and follow-up.

Efficient Handling of Rental Policies and Procedures

It is important to recognize the change in a Leasing Professional's responsibilities once the prospective resident agrees to lease an apartment home. The Leasing Professional should concentrate on administrative tasks that focus on the accurate execution of the lease paperwork while continuing to use a professional sales posture.

Accuracy is essential because these forms become an apartment community's permanent legal record. It is critical to know and understand specific lease language, applicable laws, and the apartment community's basic rental policy. At the same time, the Leasing Professional will continue to use the rapport already established with the prospect as he/she becomes a resident. This program will address the basics in handling rental policies and procedures, but each company will have their own signature policies, which the Leasing Professional must use to guide his or her activities.

Pay Close Attention to the Rental Policy

Qualifying procedures are vitally important to the success of every apartment community. Specifics about the qualification criteria are typically stated in a community's written "Statement of Rental Policy" or "Resident Qualifications Criteria." This statement is usually posted in clear view of all prospective residents in the leasing area of the Leasing Center.

In this way, the property is clearly communicating the qualifying standards that will be used to determine the eligibility of an applicant while adhering to Fair Housing laws. Many companies provide a copy of these policies to each prospect. It is the responsibility of the Leasing Professional to adhere to the Rental Policy and not deviate from its specifications.

List some key components of an apartment community's "Statement of Rental Policy":



Rental Policies

Rental Policies must:

1. **Be _____ with the lease documents.**

An example of consistency between rental policy and lease policy:

An inconsistency:

2. **Do not put the apartment community at _____ for _____ .**

Rental policies should not put a resident at risk. An example of a policy that may put residents at risk: onsite management allows easy access to master keys or key box by a large number of people which could lead to an injury suffered by a resident attacked by someone who gained access to the property by using one of the unaccounted for master keys.

Any rental policy that proves to be problematic:



3. **Be** _____, _____, **and not unlawfully** _____.

Rental policies must ensure that the apartment community does not unlawfully discriminate against a protected class such as race, color, religion, sex, handicap status, familial status, and national origin.

Example of reasonable policy:

Example of discriminatory policy:

4. **Do not lead to fraudulent** _____.

Rental policies must not trick or fraudulently cause a resident to enter into a written lease. The home and features to which the prospects agreed should be the ones that result from signing the lease.

The rental policy must be displayed in a prominent place in the Leasing Center. By doing so the property, owner and staff are complying with the fair housing guidelines, which prohibit discrimination based on the protected classes and communicates the standards used in determining the eligibility of an applicant. It is critical that the Leasing Professional reviews every part of the rental policy with every prospective and actual resident.

Statement of Rental Policy Activity

Equal non-discrimination on the basis of housing with regard to race, color, religion, sex, national origin, familial status or disability status (in accordance with the 1988 Fair Housing Amendment) should be the comprehensive policy of the management company or owner.

The company and owner must comply with all applicable local, state and federal fair housing laws. The following is a **Sample Rental Policy** and components specifically related to a particular apartment community:

Example Statement of Rental Policy

- ▶ **Availability** - Based on availability of specific apartments.
- ▶ **Monthly Rent Ratio** - Can vary. Most experts agree it should not exceed 33 percent of gross monthly income. Allowances from parents, scholarships, student subsidies and/or inconsistent income such as alimony, commissions or tips will require written verification.
- ▶ **Fees and charges** - Penalties for late rent, insufficient fund checks, also charges for additional items such as storage sheds, covered parking, garages, and other amenities.
- ▶ **Application** - To be completed by each applicant, adult resident or occupant without omissions or falsifications and must be signed.
- ▶ **Credit Check** - A complete check of credit history will be made. No bankruptcies?
- ▶ **Residence** - Current and previous residences must report prompt payment record and sufficient notice given.
- ▶ **Employment** - Stable employment and income verification.
- ▶ **Credit Bureau** - Satisfactory credit bureau rating. What about evictions? What about medical account debt? What percentage of delinquent accounts will be allowed? This must be consistent with all residents.
- ▶ **Criminal Check** - Determine where and what crimes are disqualifying. Not all companies conduct these investigations.

- ▶ **Identity Documents** - Identify and confirm original photo ID documents using a government-issued ID.
- ▶ **Application Fee** - Paid by applicant for verification of information.
- ▶ **Age** - All lessees must be of legal age to contract.
- ▶ **Roommates** - Can vary. Some jurisdictions allow no more than two (2) residents per bedroom. Each is fully responsible for the entire rental payment and both must sign the lease.
- ▶ **Occupants** - The difference between an occupant and a resident should be clearly identified. An adult occupant will generally not have financial responsibility for the rent, but an adult resident will. Be sure the distinction, if there is one, is clear.
- ▶ **Vehicles** - Two (2) vehicles per apartment. Covered parking will be assigned to residents when applicable.
- ▶ **Water Furniture/Aquariums** - Permitted on the first floor only. Residents must provide a copy of insurance coverage prior to scheduled move-in date.
- ▶ **Rental Payment** - The monthly rent is due on the first of each month. Will there be a flat fee late charge penalty for all rent paid after the late date plus a daily fee thereafter or just a flat fee? What is permitted by law? All returned checks will be assessed a \$25 service charge plus applicable late charges as stated above.
- ▶ **Renters Insurance** - Some communities require renters insurance.
- ▶ **Miscellaneous** - Boats and trailers, if permitted, must be parked in designated areas. Recreational vehicles may not be parked on the property. Discuss lock-out fees.

Completing the Application

A Leasing Professional must become proficient in helping the prospect complete the rental application. Completing the rental application requires patience, attention to detail and accuracy.

- ▶ **Patience** - It will take time to complete the rental application correctly. Both the Leasing Professional and the prospective residents may find it tedious, especially if the paperwork follows immediately after a demonstration. Avoid the tendency to rush. Try to alleviate tension by maintaining a friendly demeanor and make this required activity as pleasant as possible.
- ▶ **Attention to detail** - The rental application requests much information and provides very little space in which to write this information. Care should be taken to get all the information required and record it as legibly as possible. Remember the applicant is completing the form. The Leasing Professional acts as a guide for the applicant so long as it is within state and local laws for the Leasing Professional to assist.
- ▶ **Accuracy** - This information will be used to qualify the prospective resident. Failure to record information correctly may delay the move in, and in some cases, lead to the prospect living elsewhere.

As a tool for the Leasing Professional, the Glossary at the end of this chapter contains some common phrases asked while the application is being completed. The Glossary has been provided in English and Spanish.

The Leasing Professional should carefully explain to the prospective resident why all of this information is being gathered—that it is being used to qualify the prospect for this apartment community. The Leasing Professional should explain why particular items are requested and how the information will help the prospect move in on time. The Leasing Professional should let the prospective resident know that they will be contacted periodically concerning the status of the application.

Leasing Professionals must acknowledge the additional anxiety of prospective residents who have not yet mastered English. The Leasing Professional should take extra care to communicate clearly and slowly, with frequent explanations so that all of the information needed may be accurately collected.

As a general rule, it is better for the prospects to complete the rental application and then have the Leasing Professional review it with the prospects. This means that any mistake made on the application would have been made by the applicant and the Leasing Professional will not be held accountable for the misinformation provided by the applicant.

The Leasing Professional should review the information. The prospect has ultimate responsibility for the accuracy of the information.

“Why So Much Information?” Activity

Why must a Leasing Professional know why each item of information is necessary?

Answer: _____

Notes: _____

Application Verification

After all the required information has been recorded on a rental application, the application has been signed by all parties, and the appropriate monies have been collected, it is time to begin an investigation of the applicant.

Many management companies and owners use a company specializing in this service to conduct an investigation and verification of the application while some apartment communities rely on Leasing Professionals to help with or actually complete the investigation.

It is helpful to know and understand the verification process. This aids in keeping the applicant informed of the progress of the verification process. Most management companies use an application verification form to ensure that the verification process is consistent and detailed for all prospective residents.

Typically an **Application Verification Form** includes:

- ▶ Rental history from present and previous apartment communities;
- ▶ Employment history from present and previous employers;
- ▶ Credit history from a local credit bureau;
- ▶ Banking and personal references;
- ▶ Criminal background check; and
- ▶ Identification documents and verification.

When the application has been approved, the applicant should be notified immediately to schedule an appointment to sign the lease agreement and accompanying paperwork.

The Leasing Professional should discuss all necessary arrangements that the resident will have to make prior to moving.

If the application is not approved, a document indicating the reason for rejection should be kept in a permanent file, and the applicant should be notified immediately and in writing.

Note that it is important to recognize that an _____ may be declined or rejected, not an _____.

New resident keys should not be distributed until the lease agreement has been signed, the effective lease date has arrived, and the security deposit and rent monies are paid in full. The same rule applies for furnishings. Possession of an apartment home should coincide with the date of the lease agreement.

Sample

Rejecting an Application

It can be unpleasant and disappointing to call an applicant and tell them their application has been rejected. Sometimes there are mistakes made in the process, typically within the credit check, that prevent someone who may be qualified from being cleared to move in.

The Leasing Professional cannot disclose specific information regarding the applicant's credit report to the applicant. The Leasing Professional should provide the credit bureau's telephone number and encourage the applicant to contact the credit bureau for a credit report. The prospective resident will appreciate the concern and in the end, mistakes may be cleared up in time for the applicant to sign the lease and move in.

The Leasing Professional should be careful to follow the rules of the Fair Credit Reporting Act. The Act specifically requires a written notice to the prospect if any of the reporting companies returns a negative report and causes the application to be denied or require an additional deposit. The notice is called an "Adverse Action Notice". The notice simply advises that the information was negative, where it was received and how the prospect can contact the consumer reporting agency direct. The Leasing Professional is not involved in correcting any problem on the report. Any applicant screening completed by a third party vendor is also covered by the law. Most screening companies will automatically print such a letter if an applicant is rejected due to failure of the company screening criteria.

In 2003, the FACT (Fair and Accurate Credit Transaction) Act was passed. Its focus is to stem the tide of identity theft. If a prospect is the victim of identity theft, or suspects that he or she is a victim, the prospect can register a "fraud alert" on the account or even "block" the account. This means that the credit report on that account cannot be used in evaluating the prospect credit standing. The Leasing Professional must be sure that he or she is aware of these issues and understands the company policy regarding them.

Third party screening companies also provide criminal checks. If the application is rejected due to criminal history, again the prospect should be referred to the screening company to resolve the issue if an error is suspected. Generally, the Leasing Professional is not given the details of the criminal rejection, which again, requires the prospect to deal with the agency, not the Leasing Professional.

Improper or invalid identification can be an additional reason to reject an application. These rejections should always be handled with the assistance or direction of the Property Manager.

Sample Resident Processing Checklist

Resident's Name: _____	Today's Date: _____
Apt. # _____ Bldg. # _____	Move-in Date: _____
Leased by: _____	
Additional deposit for pet \$ _____	Security deposit \$ _____
Amount of Re-letting fee \$ _____	Pro-rated rent \$ _____

As each step below is completed, the person completing the work should sign their initials and date the appropriate column blank.

/		I. When the prospect agrees to join the apartment community, the following must occur:
(Initials/Date)		
		<input type="checkbox"/> A. Application prepared. <input type="checkbox"/> B. Application completed by applicant(s) and signed by all parties. Leasing Professional verified gov't issued photo ID information on the application. <input type="checkbox"/> C. \$ _____ Nonrefundable application processing fee collected. <input type="checkbox"/> D. \$ _____ Application deposit and/or earnest money collected. <input type="checkbox"/> E. \$ _____ "Welcome Card" with move-in instructions given to resident concerning utilities. <input type="checkbox"/> F. If resident was referred by a locator service, "Authorization For Payment of Locator Service Form" completed and placed in file. <input type="checkbox"/> G. Lease recorded on: _____ Apartments Available to Lease Form _____ Make Ready Board _____ Leasing Activity Board
/		II. Application processed and verified.
/		III. Application verification reviewed by Supervisor. The status of the applicant is: <input type="checkbox"/> Approved <input type="checkbox"/> Approved with additional deposit <input type="checkbox"/> Approved with co-signer <input type="checkbox"/> Rejected because: _____
/		IV. Resident contacted regarding results of application. Appointment was scheduled for them to sign their lease on: _____
/		V. Lease and all applicable addenda properly and accurately typed. Lease Contract _____ Pet Addendum _____ Lease Addendum _____ Family Addendum _____ Alarm Addendum _____ Rolodex made _____ Name tag made for mailbox _____ Other addendums and _____
/		VI. One day prior to move-in: <input type="checkbox"/> Apartment walked to verify market-ready. <input type="checkbox"/> If not ready, service request submitted to maintenance department concerning make-ready. <input type="checkbox"/> M/I Inventory report typed. <input type="checkbox"/> Welcome note and gift placed in apartment.
/		VII. Day of move-in: <input type="checkbox"/> All applicable papers explained, signed and initialed by resident(s) and professional. <input type="checkbox"/> All copies of paperwork given to resident. <input type="checkbox"/> Mailbox tag and emergency numbers given to resident. <input type="checkbox"/> Collected full amount of security deposit. <input type="checkbox"/> Collected rent.
/		VIII. Resident called the day after move-in to verify everything in the apartment was satisfactory.
/		IX. Manager reviewed completed file to verify all of the above was completed prior to filing in active residents file cabinet.



Resident Processing Checklist

Complete the information on the top part of the form:

- ▶ Resident's name
- ▶ Today's date
- ▶ Apartment number
- ▶ Building number
- ▶ Move-in date
- ▶ Name of Leasing Professional
- ▶ Amount of security deposit required
- ▶ Additional amount of deposit (if any) required for pet
- ▶ Amount of prorated rent (if any)
- ▶ Amount of re-letting fee (if any)

Sample

Note: Each of the following other categories is initialed and dated when complete.

Application:

1. Completed and signed and government-issued photo IDs are confirmed.
2. Nonrefundable processing fee collected.
3. Application deposit money/earnest money collected.
4. Resident provided with instructions for move-in day.
5. Complete "locator form" if resident came from locator service.
6. Application information processed and verified.
7. Verified information approved by supervisor.
8. Upon approval, contact prospective resident to schedule an appointment to come to the office to sign all paperwork.
9. Upon disapproval, contact the prospective resident to state the reason for denial without getting into detail. Retain all records. Notify applicant in writing.

Prepare all lease documents:

1. Contract, addenda and other agreements
2. Name tag made for mailbox
3. Enter into resident database

Complete the one day prior to move-in activities:

1. Check apartment home for move-in conditions and check all keys
2. Move-in inventory report typed
3. Welcome note/gift placed in apartment home
4. Ensure utilities have been changed to resident's account

Complete the move in day activities:

1. Inspect the apartment home again
2. All applicable papers explained, signed, and initialed by resident(s) and Leasing Professional – you may wish to do this BEFORE move-in day, so you can reduce the stress on the resident(s)
3. Resident given their copy of paperwork
4. Collect all move-in monies
5. Mailbox tag and emergency number given to resident
6. Give apartment home keys to resident
7. Conduct move-in inspection and apartment home orientation with resident
8. Follow-up call to verify that everything is satisfactory
9. Manager reviews completed lease file for verification

Efficient Lease Preparation and Signing

While the Leasing Professional need not become a property management attorney, it is essential that the Leasing Professional understand some basic contract principles needed to be effective in the area of Lease Agreements.

The relationship between the apartment community management and the apartment resident is fundamentally an agreement created by and embodied in a lease.

In today's environment of increasingly complex landlord/tenant law, it is critical that leases be drawn well and precisely and that they comply fully with applicable state laws.

In some areas, the state or local apartment association has developed leases that members may adopt. In general, though, the basic principals of landlord/tenant law apply widely throughout the country.

Review the leases of your own apartment communities in reference to the information discussed in this section.

The National Apartment Association has developed a national lease template that has already been accepted for use in almost half of the United States. The format offers a complete and detailed description of the relationship between the resident and the owner. The template is a valuable software package and includes additional lease forms. It is recommended that the Leasing Professional review a copy of this template.

The Law of Contracts

Everyone is familiar with contracts such as those of professional athletes, negotiated agreements with the automotive industry and personal contracts with banks to secure home mortgages.

Define the term “contract”:

Four Basic Elements of a Contract

There are four basic elements that must be present for a contract to exist:

1.

2.

3.

4.

Sample

1. **The Offer** is an invitation to enter into a contract. It is a statement made with the intent that, if accepted, creates a binding contract. An offer must be clear so that if it is accepted, the responsibilities of each party will be clearly outlined and understandable to both parties.
2. **The Acceptance** - There is usually a time period between when the prospective resident made the offer by filling out the application and when the community accepts the offer. The intervening time is used to perform credit and background checks.

Unless the prospective resident has agreed not to withdraw the offer during a specified time period, the prospective resident may withdraw the offer at any time until the manager accepts the offer by signing the contract.

Once an offer is made, it must be accepted absolutely and unconditionally in its entirety before a contract is deemed to exist. An offer cannot be accepted in part and rejected in part. If part of the offer is rejected and/or changed, you may have a counter offer.

Sample

- 3. Consideration** means that something of value is given by one party in return for something of value from another party. In the multifamily housing industry, consideration consists of residents giving us money in return for us giving them the right to live in a specific apartment home for a certain period of time under certain conditions.

Consideration goes both ways; that is, a contract is not enforceable if both parties do not receive consideration. For example, if an owner promises to allow a resident to live in an apartment home for one month and the resident does not promise anything in exchange, the owner is not contractually obligated to provide the apartment and the contract fails for lack of consideration.

Interestingly, the values of the goods and services being exchanged do not have to be the same. The law allows us to make good deals and bad deals.

- 4. Capacity**, the fourth element of the contract, is an important, enforceable concept.

Capacity is a legal term meaning the person had the competence to understand the nature and consequence of entering into a contract. To be considered competent, the party must be 18 years old or older, have sufficient mental capacity and not be under the influence of drugs or alcohol.

Once these four requirements have been satisfied, a contract will generally be deemed to be enforceable.

Elements of Lease Agreements

Leases involve a special combination of contract law and property law. **A lease is a contract whereby the owner of a property permits is another person (the resident) to use that property for a period of time in return for a rental payment.** The elements of a valid lease are the same as the elements of a valid contract:

1. The offer is made when the application is complete;
2. The parties to a lease reach agreement on the major terms of the lease;
3. There is consideration given; and
4. The parties are competent and have the capacity to contract.

Statute of Frauds

The “statute of frauds” usually requires that any lease for more than a period of one year be in writing. This means the major terms of the lease must be written down and signed by the parties. Major terms would include:

1. The address of the apartment to be leased;
2. The apartment number;
3. The amount of rent;
4. How often the rent is to be paid; and
5. The term of the lease.

If a provision in the lease has been left blank and a dispute arises over that provision, it will generally be construed against the owner in favor of the resident. This is because the owner has prepared the lease. The “obligations of the apartment owner” generally require the premises be maintained in a habitable condition. The “obligations of the resident” are to pay rent and return the premises to the owner in the same condition as received, reasonable wear and tear excepted.

There are three types of length or duration of leases:

1. _____ in which the parties agree to the exact duration of the lease.
2. _____ in which the initial term agreed upon is a short period of time, such as one month. It is agreed by the parties that, if neither party terminates within that month, the lease will automatically be renewed for another month.
3. _____ in which the parties agree that either side may terminate at any time, given reasonable notice of termination to the other party. This is similar to a month to month holdover but lacks a specified time period.

Also, the law recognizes permitted holdovers or extensions as implied leases under the identical terms of the expired lease with the exception of a defined rental period.

Lease Termination

A lease is terminated by either party at the expiration of the term of the lease. In the absence of a breach or breaking of the lease, the parties may not terminate a lease prior to the expiration of the term unless the lease contains an early termination provision that allows for an accord and satisfaction agreement permitting lease termination prior to expiration. Typically a lease document states the required notification procedures for the termination of a lease.

Avoiding Potential Lease Problems

- ▶ The lease should insist that all “residents” be identified and their ages given. This will prevent a later dispute about who is a resident and who is a guest. A single blank line for resident names may not be ample room for additional individuals’ names and dates of birth.
- ▶ The lease form is a good place to describe the delivery to the resident of keys, gate openers, and access cards.
- ▶ In light of the courts’ broadening definition of “foreseeable harm,” it may be wise for the lease to contain an acknowledgment that the owner has made no representation that the property is a secure community or that the resident is safe from theft, injury, or damage.
- ▶ Leases will identify the required method by which one party should notify the other. Leases frequently require that notices from the resident to the owner be in writing and be delivered by certified mail. Notices from the owner to the resident should be delivered either by certificate of mailing or certified mail. In addition, states may have rules on how one party should give formal legal notice to the other. The Leasing Professional must know what method the company has determined to use.
- ▶ Leases should include the resident’s acceptance of the premises and confirmation that the premises were delivered in good condition, subject to a limited time period in which the resident could submit a list of problems.
- ▶ Leases should state the presence of smoke detection devices and require the resident to acknowledge in writing that at the time of initial occupancy, they were tested and worked properly. The resident should also acknowledge that the operation was explained and the resident is required to test the smoke detector at least once a week and to advise the owner in writing of any malfunction.
- ▶ Leases should explain to residents why frequent routine inspections are in everyone’s best interest. Residents may not see every little problem and even if they notice something, they may not report it.

Rental Lease Agreement Categories

Following are common lease terms and data:

- **Premises of Apartment Property** - legal description of the property
- **Date of Occupancy** - the date the prospect will be given the keys and move in
- **Full Legal Names of Lessee(s)** - all residents responsible for the rent
- **Names of Occupants Allowed and Relationship to Lessee(s)** - all occupants whether responsible for the rent or not
- **Address, Unit Number of Premises** - street address and apartment number
- **Description of Premises, Vehicles and Parking** - type of apartment, style, vehicles coming onsite, parking rules
- **Term of the Lease** - length of the lease, renewals or automatic renewal
- **Monthly Rental Amount** - payment schedule, date due, acceptable methods of payment, address for payment
- **Utilities and Services** - who pays what and what notices of service are required
- **Monies Received at Lease Signing** - Security Deposit, first month's rent/pro-rated, pets, other charges, and late payments/related charges
- **Lessee Inspection sign-off** - generally a separate form for a move-in inspection
- **Rental Application** - included as part of the lease package, completed in full and checked
- **Rules and Regulations** - generally referenced in the lease and presented as part of the lease terms, may be a separate document
- **Signatures** - all residents must sign
- **Suggested Renters Insurance** - some companies as well as jurisdictions now require proof of renters insurance



The Move-in Process

List some tools that can be used to assist the new resident in becoming comfortable with and oriented to the apartment community:

Moving day is usually one of the most hectic, stress filled days in a person's life. The new resident may be frustrated if things do not go exactly as planned and will definitely be exhausted by the end of the day. The Leasing Professional can help soothe this transition by being prepared to help, using tools to help orient the new resident to the community and by offering diplomatic suggestions for potential challenges.

Welcome Letter

The Leasing Professional can provide the new resident with a personalized Welcome Letter. The apartment community should develop a warm, personalized letter of Welcome and place it in a prominent place in the new apartment home. The letter should offer to provide help to the new resident in getting acclimated to the new apartment home and community.

A sample Welcome Letter is included on the next page.

Sample Welcome Letter

When you write your welcome note be sure to:

- Put it on note card stock
- Hand write it
- Check for spelling and grammatical errors

Dear (name of resident):

Welcome to your new home! I know move-in day can be hectic, but I just wanted you to know how happy we are to have you live here at (name of property).

Thank you for the privilege of working with you and please call me personally if I can further assist you.

See you soon!

(your name and signature)

Sample



Move-in Packet

The Move-in Packet is a practical and important resident orientation tool. The Leasing Professional uses a file folder, manila envelope or other specifically designed brochure to compile relevant information about the community and surrounding area. The contents should include:

Resident Handbook

The Leasing Professional distributes a "Resident Handbook" with community policies and procedures. The new resident will be informed of important community policies, why they are necessary, and what actions will be taken if the policies are not followed.

Typical community policies may include:



Resident Relations

Be Available on Move-in Day

Smart Leasing Professionals realize that their future relationship with the new resident will be greatly influenced by what happens on move-in day. After the rent has been paid, the keys issued, and the Move-in Packet given to the resident, the Leasing Professional should accompany the resident to their new apartment home to answer any questions, demonstrate appliances, locate the fuse box and breaker main switches and locate and demonstrate water cut-off valves.

The resident should feel comfortable contacting the Leasing Professional at any time during the move in for assistance.

List some ways in which a Leasing Professional can demonstrate good customer service and enhance resident retention beginning with the resident's first week at their new apartment home:

Research shows that happy residents will stay in the apartment community longer than unhappy residents, thus reducing the turnover ratio.

Good communication is the key in establishing good resident relations.

Reduced Turnover = _____

Maintain resident relationships on a professional level. Avoid discussing personal relationships with residents.

List some ways to maintain an ongoing resident relations program:

Market Trust – Activity

Work with your group and describe 3 things that you can do in your role as a Leasing Professional to build market trust in resident relations.

Sample



Fair Housing Implications

List some ways in which a Leasing Professional can remain in compliance with the Fair Housing laws while completing the lease process and accompanying policies:

List the two “Golden Rules” of Fair Housing:

Sample



The following tips will help keep Leasing Professionals free of discriminatory actions:

- In dealing with prospective residents, applicants, and all residents, the Leasing Professional must provide equal service and demonstrate consistent adherence to all local, state and federal Fair Housing laws.
- Using the same defined process with every prospect is ideal but need not be robotic.
- Every effort should be made to handle all documents with professional consistency.
- While continuing through the paperwork, continue to practice fair housing principles and avoid treating any one person differently than another.
- A question asked of one prospect must be asked of all similar prospects.
- Services provided to one resident on move-in day must be provided to all residents on move-in day.
- Assisting one prospective resident to overcome problems with verification means that the Leasing Professional must assist all prospective residents with verification problems.

Note: For more information, please attend the Legal Aspects portion of the NALP program.

Summary

As a result of this NALP Program you are now able to:

1. Effectively complete a rental application;
2. Apply correct procedures in verifying a rental application;
3. Describe the key elements in apartment home contracts;
4. Successfully complete a lease agreement;
5. Identify tools and activities that help orient a new resident to the apartment community on move-in day; and
6. Recognize the fair housing implications related to the processing of rental paperwork and policies.

Examination

The NALP exam is comprehensive and delivered online. The NALP Exam is 100 questions and timed for 1 hour and 30 minutes. All participants must enroll in the designation program to be eligible to sit for the exam. To enroll in the NALP course, go to the NAA Web site at:

www.naahq.org/education

You will need an Eligibility Code in order to sit for the exam. Eligibility Codes are unique to each participant and are the key to unlocking the exam. Your Eligibility Code will be given to you by your instructor or Sponsoring Organization.

The passing point for the comprehensive exam is 70 or above.

You must work individually on the exam. No books are allowed to be used as a reference.

For more detailed information on the exam and to download the Candidate Handbook and Instructor Guides, please visit the NAA Web site:

www.naahq.org/education/designationprograms/Pages/OnlineExams

Glossary

The following list of Spanish-English phrases is offered to assist the Leasing Professional when working with non-English speaking customers. Policies may vary with the management company.

English	Spanish
Occupation	Occupacion
Number of Children – Names - Ages	Número de hijos Nombre(s) Edad(es)
Names or others that live in the apartment	Nombre de otros que viven en el apartamento
Animals and description (only one animal per apartment)	Animales y descripción (Solamente un animal en cada apartamento)
Animals weighing more than 25 lbs. are prohibited	Se prohíben animales que pesen mas que 25 libras
Employment History	Historia de Empleo
Employer’s name, address and telephone number	Aspirante Nombre de patrono dirección teléfono
Position and Supervisor’s name	Posición Nombre de superintendente
Gross monthly income – length of employment	Ingreso bruto mensual - Duración de empleo
Former employment – position – length of employment	Empleo Anterior - Posición - Duración de empleo
Other means of income	Otros bienes de fortuna

English

Spanish

Bank Accounts

Comptes en Banque

Savings account number – bank – bank branch

Numero de compte d'épargne - Banque - Agence de Banque

Checking account number – bank – bank branch

Numero de compte de cheque - Banque - Agence de Banque

Cars/Other Vehicles

Autos/Autres Vehicules

Account number – Financed By – Vehicle 1

1. Numero de compte Financie par

Account number – Financed By – Vehicle 2

2. Numero de compte Financie par

Driver's license number – Make – Model – Registered to (Vehicle 1)

1. Numero de permis de conduire Marque Modele Immatriculee A

Driver's license number – Make – Model – Registered to (Vehicle 2)

2. Numero de permis de conduire Marque Modele Immatriculee A

If you have a motorcycle, a camper or a boat that you intend to keep here, please identify them by indicating the information and numbers.

Si vous avez une moto, une roulotte de camping, un batea, etc., que vous comptez garder id, s'il vous plait, identifiezles en donnant du renseignement et les numeros.

Local credit reference – address – account number

Reference locale de credit Adresse Numero de compte

Personal reference – address – telephone number

Reference personnelle Adresse Numero de telephone

