

Checklist for the Tenant Screening Process.

by Don Conrad

Whether you're buying groceries for the family, building a website, or placing tenants in your rental, things seem to go better when you have a way to document your process. Once I discovered that this was true, I decided to start using a checklist to get me through my tenant selection process. I now use this checklist for each and every new tenant that I place in my rentals. This checklist has made my life a lot easier and saved me from missing critical information or skipping an important step.

The checklist I'm about to share with you is designed to be used from the time you meet with the tenant prospects to fill out the application, and continue through the lease signing process. A couple areas may seem unfamiliar to you. If so, please make reference to my book, "How to Find that Quality Tenant", for an explanation. (If you have trouble locating this book, visit my website at <http://www.findthatqualitytenant.com>)

Checklist: part 1-- This part of the checklist is to be used by you when the applicant fills out the initial paperwork. Do not leave the showing until all required items are checked or verified that they are not applicable (NA).

1. ___ Verify driver's license number and picture
2. ___ Verify social security number
3. ___ Landlord information complete
4. ___ Employment information complete
5. ___ Credit application filled out completely
6. ___ Credit application signed and dated
7. ___ Credit monies received
8. ___ Employment verification signed and dated
9. ___ Cash Flow form filled out
10. ___ Cosigner credit check completed, signed and dated
11. ___ Cosigner credit check monies received
12. ___ Cosigner cash flow filled out

Checklist: part 2-- This part of the checklist is for when you are at home or in the office, and are processing the applicant's paperwork. Do not rent to the applicant until all required items are processed.

1. ___ Check rental history
2. ___ Check employment history
3. ___ Check personal references
4. ___ Check credit
5. ___ Check cash flow
6. ___ Run criminal background check

Checklist: part 3-- This last part of the checklist is to be used at the lease signing. This is your last chance to get everything signed and organized the way you want it before the tenants take over your property. Don't neglect using the checklist on this step.

1. ___ Rules and regulations initialed and signed
2. ___ Fire extinguisher use and maintenance reviewed
3. ___ Smoke alarm use and maintenance reviewed
4. ___ Tenant given lead-based paint pamphlet
5. ___ Lead-based paint form signed and dated
6. ___ Property condition form signed and dated)
7. ___ Photos/video taken
8. ___ Additional/missed information verified
9. ___ Tenant received Important Contact form
10. ___ Utilities transferred
11. ___ Explained property workings:
 - a. ___ Individual water shutoffs
 - b. ___ Main water shut offs
 - c. ___ All gas shut offs
 - d. ___ Furnace filter change
 - e. ___ Appliances
 - f. ___ All others
12. ___ Pet addendum signed and dated
13. ___ Cosigner agreement signed and dated
14. ___ Copies of photo ID/social security number collected
15. ___ All lease items reviewed
16. ___ Lease signed and dated by all parties
17. ___ All monies received
18. ___ Key exchange
19. ___ Celebrate

Copies of this form can be obtained at www.findthatqualitytenant.com

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If you would like further information on this topic, please purchase my book, "How to Find That Quality Tenant". Ask your locale bookstore or see my website at:www.findthatqualitytenant.com

I am not a lawyer, therefore, if you have any legal concerns with anything in this article, please contact the appropriate legal counsel.

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Thank You. Don Conrad

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