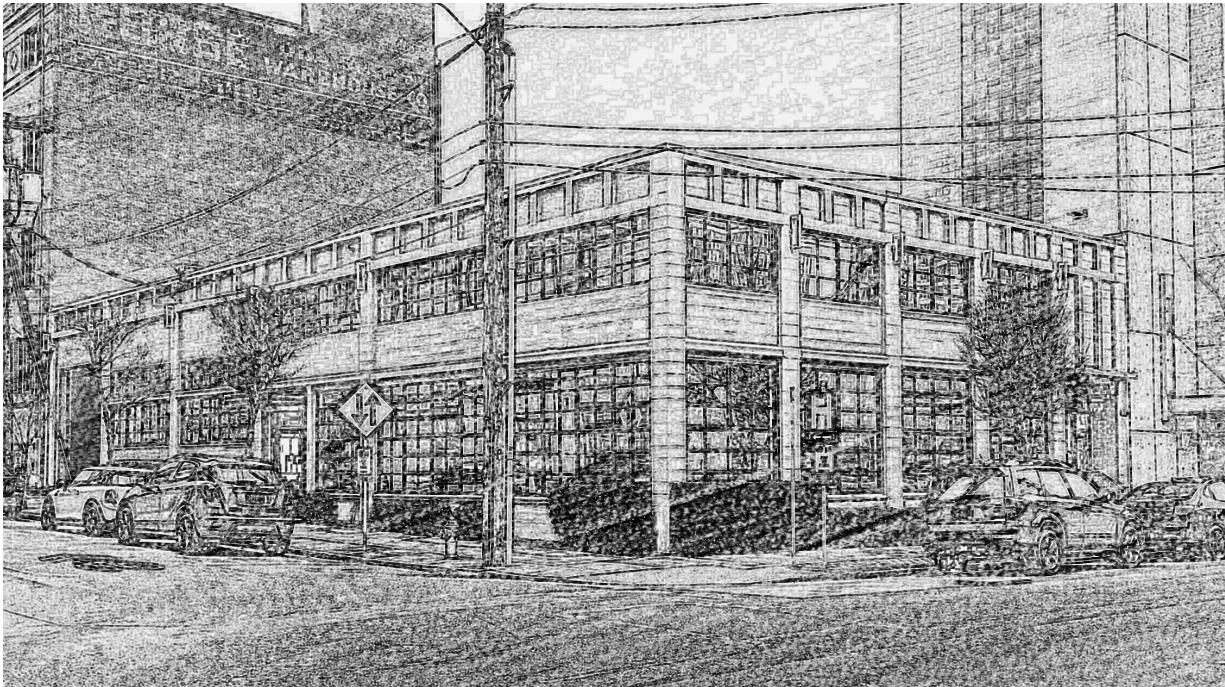




SITE CAMBRIDGE
real estate services
OPERATIONS
manual

CAMBRIDGE

real estate services



We Need Your Help

The Operations Manual is designed to be an easy to use tool for Site Management and Maintenance Staff. It should contain policy, procedures and advice on all daily activities at the site level. If you find incorrect information, missing information, general errors, or would like to suggest new content, please send your comments and suggestions to OpsManual@cambridgeres.com. Comments and suggestions will be collected and incorporated into regular updates.

The Operations Manual is meant to supplement the tools and guides already at your disposal, such as the Yardi Voyager Residential Procedures Guide, the eExchange, Tenant Tech, the Safety Manual and the Employee Handbook.

The Operations Manual is not meant to supersede Section 8, Section 42 or RD guidelines and rules. If you find any conflict, please let us know.


Available On eExchange!

This manual along with other helpful information and updates is available on the eExchange at: www.cresapts.com/eexchange

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Keep a copy of the Operations Manual on your Computer's Desktop for easy access.

To navigate quickly to the page you're looking for, simply click on the Chapter Title here in the Table of Contents and you'll be taken to the first page of content for that subject.

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Then type the subject you're interested in.

Keep a hard copy of the Employee Manual and Operations Manual in a location easily accessible to all site staff employees.

General Expectations

The following defines the basic expectations for all employees:

- Employees are to follow the guidelines of the [Cambridge Real Estate Services Employee Manual](#).
- Employees are to follow the policies in the Operations Manual.
- Employees are to represent Cambridge Real Estate Services in a professional manner.
- Employees are to treat all owners, residents, coworkers, agency officials and vendors with respect and professionalism.
- Employees are to comply with Fair Housing Laws.
- Employees are expected to have a solid working knowledge of Landlord-Tenant laws.
- Employees are to maintain properties in the best possible condition.
- Employees are to report all information relevant to their job accurately, completely and in a timely manner.
- Employees are to be conscientious and responsible in their fiscal management and business practices.

Fair Housing

Cambridge Real Estate employees are expected to offer equal housing to all applicants and residents, in compliance with Fair Housing laws, regardless of race, color, religion, sex, national origin, disability, familial status and other protected classes under federal, state and local laws. Fair Housing affects nearly every aspect of property management, from advertising, to prospect tours, to the move-out process. As such, Fair Housing compliance should guide every aspect of your job.

Discrimination against protected class members is illegal. Not only would the company be held liable for Fair Housing violations, but the individual committing the offense could also be held personally liable.

Fair Housing Training

All Cambridge employees are required to successfully complete the Fair Housing course offered by Grace Hill on an annual basis. Go to this [page](#) for login instructions and click on the Grace Hill link in the left column. For questions about completing your training and the requirements, please contact your Area Leader or Supervisor.

Fair Housing Practices

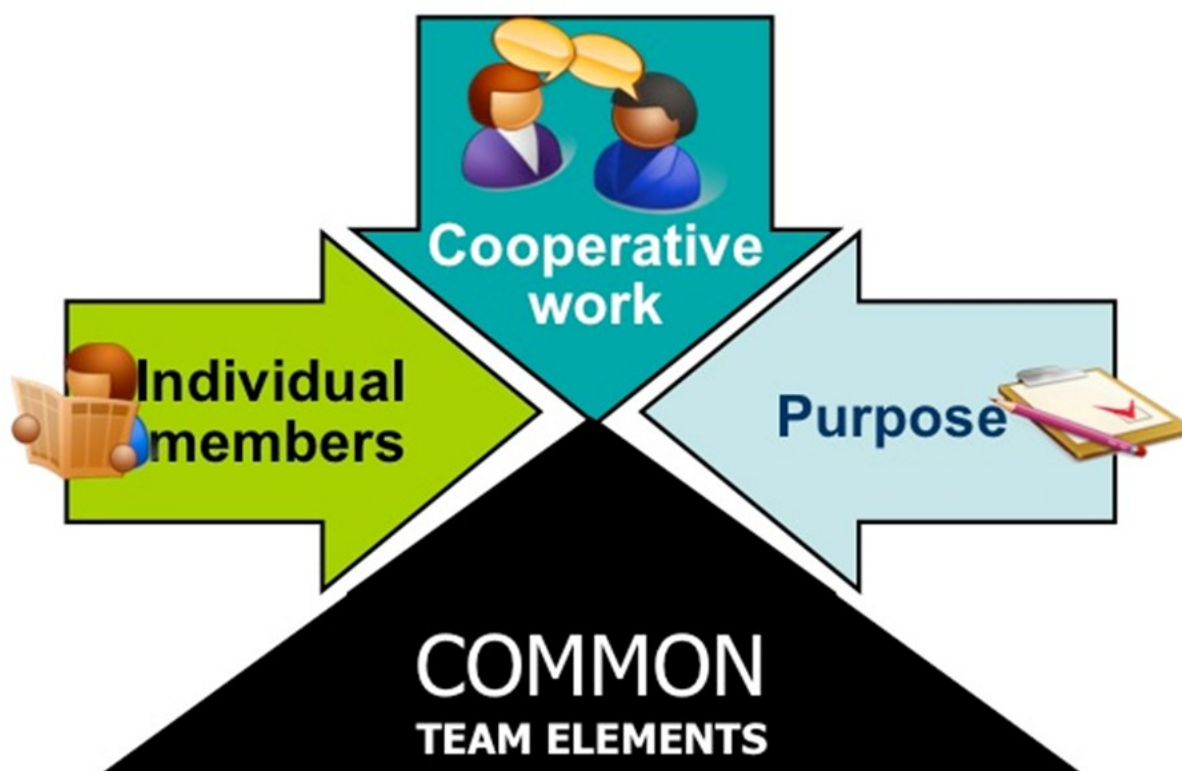
Consistency helps to ensure compliance with Fair Housing laws. The Operations Manual is designed to provide guidelines and policies to standardize operations so that every individual we work with is treated the same throughout Cambridge's diverse portfolio of properties. Adhering to the practices in the Operations Manual helps Cambridge provide the best possible service to all its customers and protects its employees and the business from exposure to liabilities.

For easy access, keep an electronic copy of the Operations Manual on your desktop.

Effective Teams

The principles of teamwork should underpin how you operate and manage your staff and community. Managing a staff doesn't only mean acting as overseer, or simply making sure that staff get their work done. It also means involving team members in a responsible, purposeful and creative role, coaching and helping staff to develop their skills and be successful in their jobs to ensure that, together, you're all able to succeed. Here are some benefits to managing an effective team:

- ✓ Increased Productivity
- ✓ Higher Quality of Work
- ✓ Increased Creativity
- ✓ Stronger Shared Morale & Camaraderie
- ✓ Aid in Employee Retention
- ✓ Improved Resident Experience
- ✓ Enhanced Bottom Line



Help make staff meetings the highlight of the week. Bring treats.

Staff Meetings and Teambuilding

Weekly staff meetings are a central part of running an effective and successful property.

Below are suggested topics to cover during each meeting:

1. **Review** – Follow up on the previous week’s topics and events. Was the team successful in meeting its goals? What could have been done better? What went exceptionally well?
2. **Set Measurable Goals** – Set goals for the following week and month. Having a committed goal for the entire staff helps to build team purpose. Consider eliciting each week’s goal from your staff. Allow them to help drive the ship, so to speak, and make space for them to be creative in the workplace. Be ready with your own set of goals in case the room stays quiet. Consider goals involving the following tasks:
 - Applications
 - Preventative Maintenance Inspections and Repairs
 - Turnovers
 - Work Orders / Maintenance Requests
 - Exterior Projects
 - Resident Issues
3. **Communicate Status** – Keep your staff up to date on the property’s most important markers – Number of notices, applications received, net to rent, average time to complete maintenance requests, percentage of PMIs completed, etc. Help them feel a sense of ownership for the tasks at hand.
4. **Special Projects** – Review ongoing and upcoming projects on your property. Ask for comments on property condition and ideas on improvements. Instill a sense of long term responsibility to the property and its residents in your staff.
5. **Collaborate** – Discuss upcoming projects and issues and work together to find creative and efficient solutions. Discuss the week’s schedule and set responsibilities and expectations.
6. **Look Forward** – Define long term goals for your staff. Consider quarterly and annual income goals, project goals, maintenance goals, etc. There are endless possibilities. Consider what would most benefit your property and help direct your staff’s energies in that direction.

One of the most effective ways to lead is by example. Always demonstrate the kind of attitude, work ethic and productivity you’d like to see from your staff.

Want to provide a little extra motivation for a specific goal? Consider contacting your Supervisor about staff incentive opportunities.

Residents have more confidence in management receiving consistently great customer service.

Customer Service

When residents sign a lease agreement and take possession of their apartment they're expecting more than just the walls and ceiling that define their living space. They also expect quality customer service and timely professional maintenance. Part of our job is to provide consistent quality service from the moment a prospect first contacts the property to the last time a former resident uses the property for a rental reference.

- **Listen to What your Prospects and Residents are Saying to You**
Residents aren't all the same. Find the time to ask a few thoughtful questions and customize your response. Not only will you learn something new, your residents will feel more connected and loyal.
- **Find Opportunities to Connect Personally and Authentically**
That can be difficult when you have a lot of residents, but you can do it. Think of your communication style, remember and acknowledge an important event, send a handwritten thank-you note, be sure your office staff recognizes a resident when he or she calls the office.
- **Be Surprisingly Responsible**
Of course we all know to respond to issues, questions and complaints – but this is what everyone (i.e. your competitors) does, too. When your residents have to wait, they get cranky and frustrated. Respond within hours – even if it is simply to acknowledge that you received their call and will be getting back to them shortly.
- **Set Expectations and Always Follow Through**
When a resident makes a request, whether it's a request for maintenance service or a question about their lease – set the expectation of when they can expect a response and then deliver to them exactly on that day. Do what you say you'll do, when you say you'll do it, and you'll build trust and loyalty.
- **Identify Unique Ways to Deliver Stand-Out Service**
Rise above your competition. The best place to start is by asking your residents. Conduct a health check with a few residents every month and ask them the one thing you should be doing to keep their business, then (and most importantly) find a way to do it!

Consistent enforcement of lease policies demonstrates your commitment to the Community.

Resident Retention

Consistent quality customer service has numerous benefits, but resident retention may affect the bottom line more than any other.

The real cost of re-renting an apartment versus renewing a lease varies from community to community, but keeping an existing resident is typically far less expensive than replacing that resident with a new one.

Providing consistent quality customer service is a team effort. Discuss ways you and your team can provide better service to your residents. There's always room to improve.

Meet and exceed your residents' expectations:

- **Friendly, professional, communicative office staff.** Greet Residents by name and with a smile. Respond to calls the same day and keep residents updated about ongoing issues. Treat residents with respect and courtesy, and listen carefully to what they have to say.
- **Responsive maintenance that gets the job done right the first time.** Aim to respond to all maintenance requests within 48 hours, preferably within 24 hours. Keep the maintenance shop stocked with needed repair and replacement parts for quick response times. Always double check your work and communicate with your manager if time is required to know if a repair is functioning properly.
- **Consistent enforcement of the lease.** Residents want to know they're living in a safe, fair and predictable community. Consistent enforcement of lease policies demonstrates your commitment to the community, and it's your job.



Keeping an existing resident is typically far less expensive than finding a new one.

How Much Does it Cost to Lose a Resident?

Fill out the costs for your most recent turns. What's the real cost of a losing a resident at your property?

Let's take a look at an example:

Fill in your costs:

Lost revenue*	\$1,050	_____
Repair to walls	\$100	_____
Paint	\$925	_____
Carpet Clean and Repair	\$150	_____
Cleaning	\$175	_____
Change door locks	\$ 35	_____
Change mailbox locks	\$ 15	_____
Miscellaneous repair	\$150	_____
Advertising	\$100	_____
Total	\$2,700	\$ _____

**Here's how we arrived at the lost revenue figure: Let's say the apartment sits vacant for 21 days between residents. Calculate lost rent by taking \$1500 (monthly rent) divided by 30 (days of the month) times 21 (days vacant).*

How much does it cost to keep a resident?

Now let's look at the costs involved in retaining a resident. Admittedly, these costs are significantly less than those involved in preparing an apartment home for a new resident, marketing and leasing that home.

Let's take a look at an example:

Fill in your costs:

Discount off Premium Rent for Renewal (full year)	\$480	_____
Touch up paint	\$250	_____
Total	\$730	\$ _____

Always have documents ready before residents or prospective residents arrive.

Site Office Appearance

Appearances make a powerful impression. Maintaining a neat, attractive and organized office projects a professional image to everyone from the prospective residents meeting you for the first time, to the long-term resident looking for a solution to a stubborn problem, to the vendors you work with daily—even your supervisor. Implement the following standards to maintain a neat, organized and attractive office space.

- Keep leasing areas and desks neat, organized and free from clutter.
- Clean the site office and bathrooms every day.
- Store resident files in their proper place unless they're currently being worked on, and put resident files away while working with residents, prospective residents and vendors to protect confidentiality.
- Keep brochures, floor plans, blank applications and any other rental materials on hand and available for prospective residents at all times.
- Have leasing forms readily available.
- Keep the required signs and postings up to date and posted in the appropriate locations.
- Keep make-ready boards and other operational items out of sight of residents and prospective residents.
- Post emergency contact numbers in a location easily and clearly accessible to all on-site staff members.
- Smoking is *not* permitted in any office or outside the front door. On Non-Smoking properties, no smoking is permitted anywhere on the property.
- Keep the office looking up to date. Have the walls painted and the carpet cleaned as needed to keep the office looking fresh. Contact your Supervisor if the office furniture is in need of replacement.



**Contact the HR Department if you need employment posters.
Don't order posters from anyone else!**

Required Signs and Posters

It's important to ensure that signs required by state and federal law, agencies (RD, TC, etc.) and as required by Cambridge Real Estate Services are posted correctly in your office. The following list describes guidelines for the posters at your site. (See below for a list of the required posters.)

- All posters must be displayed in a manner and location to allow viewing by the affected persons, whether they are employees, residents, or prospective residents.
- Federal and state employment law posters – Such notice or notices shall be posted by the employer in each establishment in a conspicuous place or places where notices to employees are customarily posted. Each employer shall take steps to ensure that such notices are not altered, defaced, or covered by other material.
- Federal and state laws from agencies governing resident/property subsidy programs require posters to be in plain view for all resident and prospective residents.
- The Federal and state government supply all required posters at no cost. Please contact HR@cambridgeres.com to receive/replace posters. Please request and post any additional languages if applicable. As posters are revised/updated, HR will provide new versions to replace or add to current posters.
- The Federal and state government will enforce fines to properties not in compliance with their required postings.
- Many properties receive “junk” mail or email regarding federal and state posters. *Do not* order forms from these vendors. Request the posters directly from Cambridge Human Resources.

List of Required Signs and Posters

Review the following list to confirm your property has the appropriate and complete signage for your property; federally mandated posters; posters for your state; Cambridge required office posters; and agency posters as applicable to your property (RD, TC, etc.).

For All Properties – to be posted in the management office clearly visible to residents, and prospective residents.

- Sign – “*Thank you for providing photo ID prior to touring our community.*”
- Criteria for Residency (specific to your property)
- Equal Opportunity in Housing poster
- An office sign clearly visible even when the office is closed showing business hours, the office phone number, and emergency number(s). Handmade signs are not allowed.

Site Office Operations

Post required Employee Posters in an area where all employees can easily access them.

Federally Required Posters – Required for all offices. To be posted in each establishment in a conspicuous place or places where notices to employees are customarily posted.

- Fair Labor Standards Act – Minimum Wage
- Job Safety and Health
- Family Medical Leave Act
- Equal Employment Opportunity
- Notice to Workers-FLSA, SCA and Walsh-Healy Act
- Employee Polygraph Protection Act
- Uniformed Services Employment Act and Reemployment Rights Act-USERRA

State Employment Posters

All State Employee Posters appropriate to your state are to be posted in an easily accessible location and visible to all site employees.

State of Oregon

- State Minimum Wage
- Oregon Family Leave Act
- Job Safety and Health Poster “It’s the Law”
- No Smoking
- Workers Compensation Notice of Compliance
- Employment Insurance Notice
- City of Portland Only: FAIR Required Posting

BUREAU OF LABOR AND INDUSTRIES
OREGON
MINIMUM WAGE RATES
 Effective July 1, 2018 to June 30, 2019

An employer shall pay an employee no less than the minimum wage rate for the region in which the employer is located. (See explanation below.)

Standard:	\$10.75 per hour
Portland Metro:	\$12.00 per hour
Washington County:	\$10.50 per hour

Regions: The "Standard" rate applies to the following counties, with the exception of those areas located within the urban growth boundary of the metropolitan areas of: Astoria, Clatsop, Columbia, Clackamas, Clatskanie, Clatsop, Coos, Curry, Deschutes, Douglas, Gilliam, Grant, Harney, Jefferson, Josephine, Lincoln, Linn, Marion, Multnomah, Polk, Tillamook, Wasco, Wheeler, and Yamhill.

Portland Metro: The rate for the Portland Metro area applies to the urban growth boundary of the metropolitan areas of: Clatsop, Clackamas, Clatskanie, Clatsop, Coos, Curry, Deschutes, Douglas, Gilliam, Grant, Harney, Jefferson, Josephine, Lincoln, Linn, Marion, Multnomah, Polk, Tillamook, Wasco, Wheeler, and Yamhill.

Washington County: The rate for the Washington County area applies to the urban growth boundary of the metropolitan areas of: Clatsop, Clackamas, Clatskanie, Clatsop, Coos, Curry, Deschutes, Douglas, Gilliam, Grant, Harney, Jefferson, Josephine, Lincoln, Linn, Marion, Multnomah, Polk, Tillamook, Wasco, Wheeler, and Yamhill.

Control Violations: An employer who violates the minimum wage law is liable for a civil penalty of up to \$1,000 for each violation. The penalty may be reduced to \$500 if the employer can show that the violation was not willful. The penalty may be reduced to \$100 if the employer can show that the violation was not willful and that the employer acted in good faith.

Employer Liability: An employer who is liable for a civil penalty under this law is also liable for the costs of the civil penalty. The employer is also liable for the costs of the civil penalty if the employer is found liable for a civil penalty under this law.

State of Washington

- State Minimum Wage
- Notice to Employees
- Job Safety and Health Protection
- Your Rights as a Non-Agricultural Worker
- Notice to Employees-Unemployment

PLEASE POST NEXT TO YOUR IWC OR INDUSTRY OCCUPATION INDEX
OFFICIAL NOTICE
California Minimum Wage
 1918-2019

Effective Date	Minimum Wage (per hour)	Minimum Wage (per hour)
January 1, 2018	\$11.00	\$15.00
January 1, 2019	\$11.00	\$15.00

LAW ENFORCEMENT: The provisions of this Order shall not apply to public employers and individuals who are the parent, spouse, or child of an employer who is a public employer. This Order shall not apply to public employers and individuals who are the parent, spouse, or child of an employer who is a public employer.

EMPLOYER LIABILITY: An employer who is liable for a civil penalty under this law is also liable for the costs of the civil penalty. The employer is also liable for the costs of the civil penalty if the employer is found liable for a civil penalty under this law.

EMPLOYER RESPONSIBILITIES: An employer who is liable for a civil penalty under this law is also liable for the costs of the civil penalty. The employer is also liable for the costs of the civil penalty if the employer is found liable for a civil penalty under this law.

State of Idaho

- State Minimum Wage
- Notice to Employees-Unemployment
- Workers Compensation

Post Posters in a way that is professional looking and appealing to the eye.

Site Office Operations

State of California

- IWC Order
- Minimum Wage Order
- Pad Day notice
- Cal/OSHA form 200 (required to be posed annually during the month of February)
- Workers' Compensation Insurance
- Harassment or Discrimination in Employment is Prohibited (DFEH-162)
- Notice to Employees concerning Disability Benefit and Unemployment Insurance
- Voting Notice
- Whistleblower Protections

Program Posters

For Rural Development and Tax Credit Properties.

Rural Development Properties (RD) – To be posted in the management office as well as any common areas such as laundry room and/or common area mail center.

- Approved Affirmative Fair Marketing Housing Plan (AFMHP) with attachments
- Current Rent Schedule, Basic and note Rent along with Utility Allowances
- Tenant Selection Criteria
- Grievance Policy (Spanish/English/Other)
- "And Justice for All" poster
- Equal Housing Opportunity (Spanish/English/Other)
- TTY Phone number on any/all documents/signage where property phone number is listed

Tax Credit Properties (TC) – To be posted in the management office.

- Tenant Selection Criteria
- Tax Credit Housing Addendum
- Equal Housing Opportunity (Spanish/English/Other)



U. S. Department of Housing and Urban Development ↑

EQUAL HOUSING OPPORTUNITY

We Do Business in Accordance With the Federal Fair Housing Law
(The Fair Housing Amendments Act of 1988)

It is illegal to Discriminate Against Any Person Because of Race, Color, Religion, Sex, Handicap, Familial Status, or National Origin

<ul style="list-style-type: none"> ■ In the sale or rental of housing or residential lots ■ In advertising the sale or rental of housing ■ In the financing of housing 	<ul style="list-style-type: none"> ■ In the provision of real estate brokerage services ■ In the appraisal of housing ■ Blockbusting is also illegal
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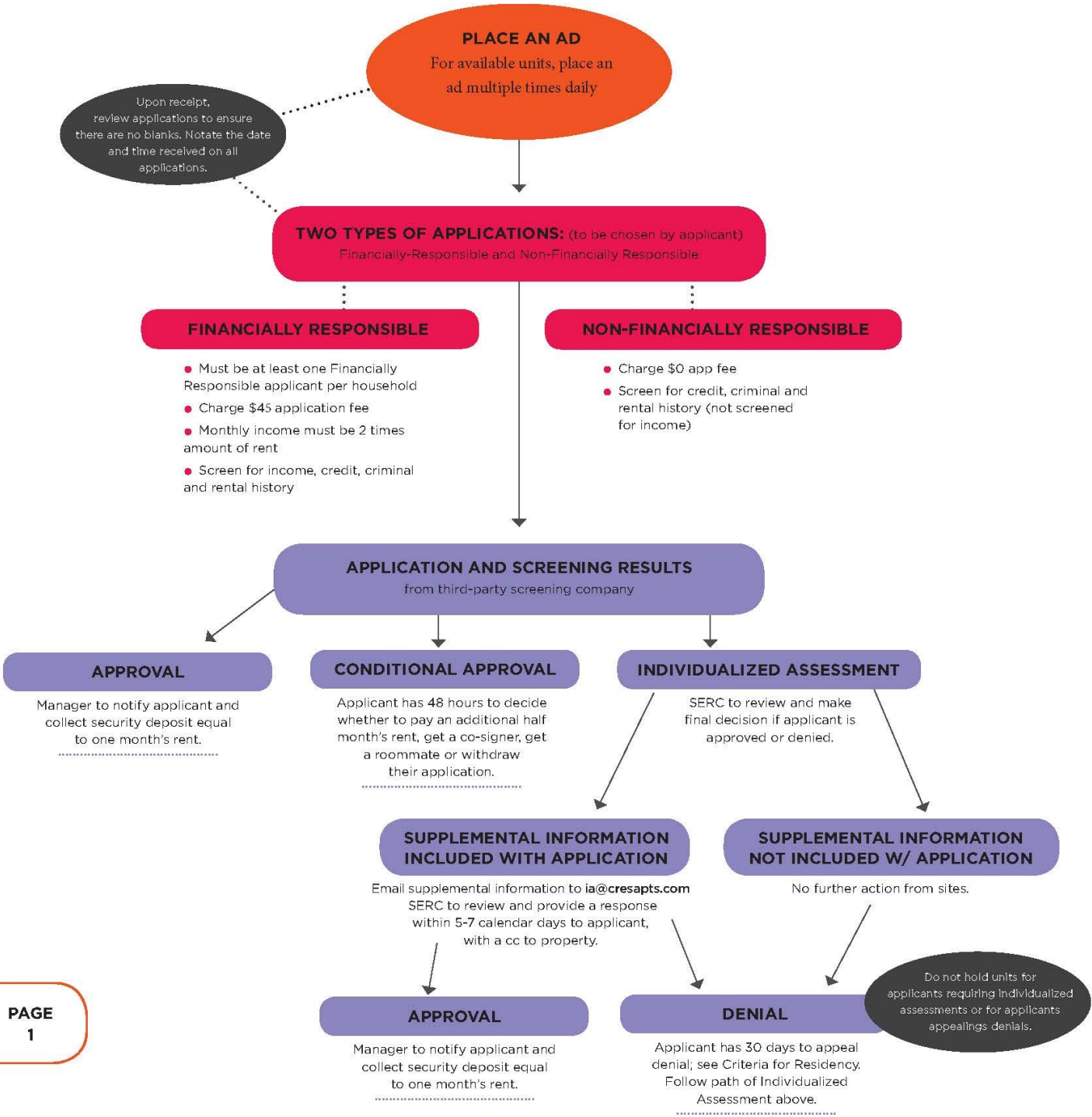
Anyone who feels he or she has been discriminated against may file a complaint of housing discrimination:
1-800-669-9777 (Toll Free)
1-800-927-9275 (TTY)

U.S. Department of Housing and Urban Development
Assistant Secretary for Fair Housing and Equal Opportunity
Washington, D.C. 20410

Previous editions are obsolete Form HUD-908.1 (2/2003)

Remember the 3 day wait period before accepting applications!

FAIR Ordinance Road Map



FAIR allows for up to three payments of the security deposit

FAIR Ordinance Guidelines for Current Residents



The rental history will automatically print with your forms. You still need to complete.

FAIR Ordinance Guidelines for All Move-Ins, Regardless of Move-In Date

NOTICE OF NON-PAYMENT

For all residents, regardless of move-in date, include all attachments and be sure to complete **PHB Rental History Request** form and copy of resident ledger from Yardi



REQUEST OR NOTICE TO VACATE

For all residents, regardless of move-in date, upon request by resident and/or when resident gives notice to vacate, provide resident completed **PHB Rental History Request** form and copy of resident ledger from Yardi

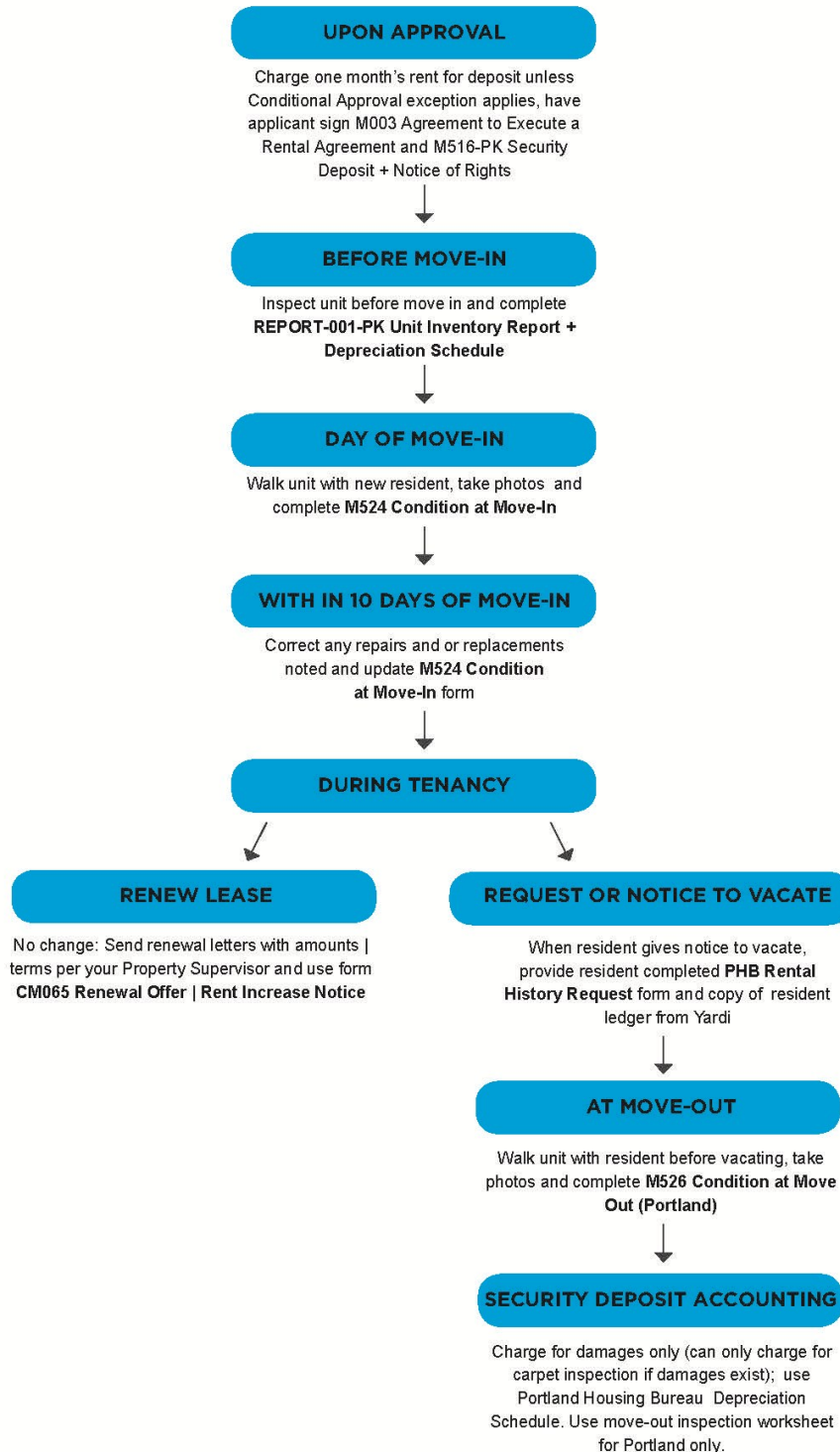


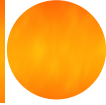
SECURITY DEPOSIT ACCOUNTING

For all residents, regardless of move-in date, process Security Deposit accounting within 20 days

Cambridge strongly encourages an interactive walk-through

FAIR Ordinance Guidelines Now Applicable to All Move-Ins





The Key Sign Out Sheet helps you track who has your keys and can be invaluable if one goes missing.

Key Management

Proper key management protects keys from being lost, stolen and the associated liabilities. No one wants to force a vendor to wait while you track down a key or explain to a resident that the key to their apartment has been lost.

- Apartment Keys must not be mastered.
- All apartment keys must be kept in a key box that is locked at all times
- Apartment key tags must be coded in a manner not reflecting the building or unit number and listed on the [Key Log](#).
- The decoding system for the key tags must be kept separate from the key box and in a secure location.
- All apartment door locks must be changed or rekeyed between each move-out and move-in.
- Residents will be charged \$30 for a replacement key.
- Afterhours lockouts are not a maintenance emergency. Residents should contact a locksmith to regain entry to their apartment.

Issuing of Keys

- Keys may only be issued by the site office staff.
- Before keys are issued to residents, staff members must verify they are on the lease and may require photo ID for identification.
- Keys are never to be issued to a resident who is not on the lease.
- Before issuing a key to a minor, obtain approval from the lease holding parent or guardian—give Mom or Dad a call.
- All maintenance staff, office staff, vendors and contractors must sign for key(s) issued to them on the [Key Sign Out Sheet](#).

Note: If an office copy of a resident key goes missing, management should contact the resident, replace their lock or rekey their lock, and issue new keys to the resident.

For advice on how to label your key tags effectively, contact your Supervisor.

Site Office Operations



Site Office Operations

The Marketing Scorecard is a great tool for understanding traffic at your property and can help you determine whether rental rates are too high or too low based on traffic.

Reporting to SERC

All Cambridge properties are required to report specific information to their Supervisor, the Accounting Department, and the Human Resources Department. This chapter will provide information on the specific types of reporting and deadlines.

The Marketing Scorecard

Properties required to use the Marketing Scorecard are selected by the Property Supervisor.

The Marketing Scorecard, an Excel spreadsheet, is a tool used to track the property's rental traffic, applications, notices and net-to-rent. When filled out daily and correctly, this report will show the heaviest traffic days, sources generating the most traffic, whether sources are generating qualified renters, how many prospects are interested in renting, and if not, why. It will also show notices received and the reason.

New Marketing Scorecards are distributed via email from the Central Office at the beginning of the year and include the months January through December on tabs at the base of the form.

If your property has been selected to use the Marketing Scorecard, fill out the fields daily and email the Scorecard to *marketing@cambridgeres.com*. The Subject Line of the email should report the following:

Vacancies / Apps on Vacancies (Application Rent) / Notices-to-Vacate (Move-out Notice Rent) / Apps on notices (Application Rent) / Net Available

Example: 4/2(\$2550)/1(\$1225)/1(\$1350)/3 — **Reads as:** 4 vacancies with 2 aps for vacant units totaling \$2550, with 1 notices-to-vacate from an apartment rented at \$1225, and one application for that apartment on notice rented at \$1350, and 3 net available.

(Note: Except for rent prices, this is the same information in the same order as the last 5 columns in the Marketing Scorecard)

If an **application is withdrawn**, note the rent amount for the withdrawn application like this <\$1275>

Example: 4/1(\$1275;<\$1275>)/2(\$1225)/1(\$1350)/3

Filling out the Marketing Scorecard

Personalize the scorecard at the top by adding the Property Name and Supervisor Name. Notice the orange columns? These columns have pre-calculated formulas in them.

MARKETING SCORECARD					HAPPY VILLAGE APARTMENTS					October 2012					SUSIE				
					PROPERTY NAME					MONTH					SUPERVISOR				
ADVERTISING					TRAFFIC ACTIVITY & INFORMATION					APPLICATION ACTIVITY					NOTICES & MOVE-OUTS				
Date	Day of Week	Newspaper Lines	Online Advertising	Other	Calls	Source	Shows	Source	Decision	Received	Withdrawn	Denied	Move-ins	Net Change	Source	Notices Received	Reason	Move-Outs	Vacancies
1	MON	3	2CL		2	CL/R	1	CL	TA	0	0	0	0	0		2	LANTS	0	4
2	TUE		3CL		3	2CL/R	4	2CL/R/DB	2LF/TS/TI	1	0	0	0	1	R	0		0	4
3	WED		CL		0		2	2DB	2TA	0	0	0	1	0		0		0	4
4	THU		2CL		1	CL	2	2CL	2TA	1	0	0	0	1		0		0	4
5	FRI		3CL		2	2CL	1	DB	TA	0	0	1	0	-1	<R>	0		1	4
6	SAT		CL		0		0			0	0	0	3	0		0		0	4
7	SUN				0		0			0	0	0	0	0		0		4	4
WEEKLY TOTALS					8		10			2	0	1	4	1		2		5	4

At the start of the year, transfer the prior month's ending stats from December to January.

Prior Month's Ending Stats

The "Prior Month's Ending Stats" will be blank at the start of each month. After double checking the numbers for accuracy, use the month ending stats from previous month to fill in the "Prior Month's Ending Stats". For January, use December's numbers from the Scorecard from the previous year. The previous month's ending stats will be found on the last day of the previous month in the same columns.

SUSIE		Prior Month's Ending Stats							
SUPERVISOR		4	4	3	3	0	20		
NOTICES & MOVE-OUTS		STATUS SUMMARY							
Notices Received	Reason	Move-Outs	Vacancies	Apps on Vacancies	Notices	Apps on Notices	Total Available	Number of Applicants on Wait List	Date Active
2	LATS	0	4	4	3	3	0	20	
0		0	4	4	3	4	0	21	
0		0	4	3	3	4	0	22	
0		0	4	3	3	5	0	23	
0		1	4	3	3	4	0	23	
0		0	4	0	3	4	0	23	
0		4	4	4	3	0	0	25	
2		5							

Advertising

Each day, input the advertising posted for your property. Most communities will use Craigslist, but some more rural locations may be placing ads in newspapers. You can see in the example that on Tuesday there were 3 Craigslist Ads posted, and, on Saturday, 1 Craigslist Ad was posted.

ADVERTISING				
Date	Day of Week	Newspaper Lines	Online Advertising	Other
1	MON	3	2CL	
2	TUE		3CL	
3	WED		CL	
4	THU		2CL	
5	FRI		3CL	
6	SAT		CL	
7	SUN			
WEEKLY TOTALS				

Site Office Operations

You can use the Marketing Scorecard to evaluate where your traffic is coming from, what's working and where you might need to focus more attention.

Traffic Activity and Information

At the conclusion of each day, enter the day's traffic information into your Marketing Scorecard. In the example below you'll see that the property received 2 calls on Monday. One was from Craigslist Ad and the other was a Referral. That same day 1 apartment tour was given to a person who heard about the community through Craigslist and they decided to Take an Application.

- **Calls** – Phone calls you received from people interested in learning more about your community
- **Source of Calls** – Remember to ask each caller how they heard about your community (*Note:* there are “source codes” at bottom of spreadsheet)
- **Shows** – How many tours you gave
- **Source of Shows** – How did the people you gave tours to find out about the community?
- **Decision** – Did they take an application, decide to think about it, decide it wasn't a good fit for them?

TRAFFIC ACTIVITY & INFORMATION						
Date	Day of Week	Calls	Source	Shows	Source	Decision
1	MON	2	CL/R	1	CL	TA
2	TUE	3	2CL/R	4	2CL/R/DB	2LP/TS/TT
3	WED	0		2	2DB	2TA
4	THU	1	CL	2	2CL	2TA
5	FRI	2	2CL	1	DB	TA
6	SAT	0		0		
7	SUN	0		0		
		8		10		

RENTAL ACTIVITY CODES FOR SOURCES
AG(i) = APT. GUIDE (internet)
CL = CRAIG'S LIST
DB = DRIVE BY
FR(i) = FOR RENT (internet)
N = NEWSPAPER
PB = PHONE BOOK
R = REFERRAL
RC = RENT.COM

CODES FOR DECISIONS	
F = FUTURE	TA = TOOK APP
LF = LOOK FURTHER	TI = THINK ABOUT
NQ = NOT QUALIFIED	TS = TOO SMALL
PD = PAID APP FEE	\$\$\$ = TOO MUCH

Having trouble with the numbers in the Marketing Scorecard? Contact your Supervisor for assistance.

Application Activity

Track your applications received, withdrawn, denied and move-ins in these columns. You will also want to record the source of the applicant. It can tell you which types of advertising are delivering qualified applicants and which are not.

The example below shows that on Tuesday 1 application was received and the application was a referral. On Friday a referral application was denied.

		APPLICATION ACTIVITY					
Date	Day of Week	Received	Withdrawn	Denied	Move-Ins	Net Change	Source
1	MON	0	0	0	0	0	
2	TUE	1	0	0	0	1	R
3	WED	0	0	0	1	0	
4	THU	1	0	0	0	1	
5	FRI	0	0	1	0	-1	<R>
6	SAT	0	0	0	3	0	
7	SUN	0	0	0	0	0	
		2	0	1	4	1	

Take time toward the end of every month to evaluate the information gathered in your Marketing Scorecard. Which forms of advertising garnered the most attention? Are you converting as many phone calls into tours as you'd like? Are those tours being converted into leases?

If you think there's room for improvement consider strategizing with your staff, getting input from your Supervisor and/or Supervisor.

Site Office Operations

Double check your numbers daily. It's much easier to fix a mistake the day it occurs than it is to search back through the weeks to find it.

Notice, Move-outs and Status Summary

Notices Received – If a current resident gives you a 30-day notice it should be recorded in the “Notices Received” column on the day it’s received and the reason noted for easy reference.

Move-Outs – In the Move-Outs column, note if you had any move-outs occur that day.

Apps on Vacancies & Apps on Notices – As you accept applications, use this form to keep track of the number of applications you have taken for your vacant apartments, as well as applications you’ve accepted for any apartments on notice. If an application is denied or canceled, subtract it from the appropriate column.

Number of Applicants on Wait List – If you have a waiting list for your community, note how many people are on the list.

On Monday, in the example below, two move-out notices were received from current residents. One resident is leaving the area and the other resident is moving to a larger home. That same day the community has four applications for vacant apartments, three applications on soon to be vacant apartments and twenty people on the waiting list.

SUSIE		Prior Month's Ending Stats					
SUPERVISOR		4	4	3	3	0	20

NOTICES & MOVE-OUTS				STATUS SUMMARY						
Date	Day of Week	Notices Received	Reason	Move-Outs	Vacancies	Apps on Vacancies	Notices	Apps on Notices	Total Available	Number of Applicants on Wait List
1	MON	2	LA/TS	0	4	4	3	3	0	20
2	TUE	0		0	4	4	3	4	0	21
3	WED	0		0	4	3	3	4	0	22
4	THU	0		0	4	3	3	5	0	23
5	FRI	0		1	4	3	3	4	0	23
6	SAT	0		0	4	0	3	4	0	23
7	SUN	0		4	4	4	3	0	0	25
		2		5						

CODES FOR MOVE-OUT NOTICE SOURCE	
BH = Bought Home	RI = Rent Increase
DR = Deceased	RM = Roomate Issues
EV = Eviction	S* = Skip
HR = Health Reasons	TS = Too Small
LA = Leave Area	XFR = Transfer
LJ = Lost Job	
** Rescinded notice--use initial reason and show in <>.	

Keep Yardi up-to-date so that Supervisors and substitute Managers can quickly understand what's going on at your property.

Regular Yardi Reporting

If someone in the central office needs to know what is going on at your property, they should be able to get a very good idea simply by looking at Yardi. If you're out sick or on vacation and a substitute Manager is at your property, that person should be able to open Yardi and know exactly which units are vacant, if there are any tours scheduled, etc.

Data for properties should be added in real time during all office hours maintained at each property.

What to enter:

- Enter new guests—even the ones who do not apply
- Notices received
- Move-ins
- Move-outs
- Ready apartments
- Ledger corrections
- Changes in Rent or other Charges
- Add photos or notes on specific units
- Etc.

Weekly Occupancy Tracker

On Friday, check that all the week's data has been entered into Yardi. Then select **Weekly Occupancy Tracker** from the Reports menu, select the appropriate date and click on submit. The report will show the vital statistics for your property: Total Units, Current Occupancy, Projected Occupancy %, Vacancies, Apps on Vacancies, Notices, Apps on Notices, and Net Available. This is the same information required to complete the [Weekly Manager Report](#).

Name	Units	Current Physical Occupancy	Projected Occupancy	Vacancies	Apps on Vacancies	Notices	Apps on Notices	Net Available Units
Pleasant Hills	220	94.1%	94.1%	13	3	3	0	13
Total	220	94.1%	94.1%	13	3	3	0	13

Site Office Operations

Run the Aged Receivables report regularly to keep on top of balances due.

Reviewing Aged Receivables

Increase revenue, lower bad debt and improve your NOI by running the Aged Receivables report and following up on past due balances. Use this report to help determine which residents have balances due and follow up with Balance Due Notices found in [Tenant Tech](#). You will find balances owed under the Current Owed Column. Use this report on the 5th after all on-time rent payments have been entered into Yardi and apply late fees to all residents who have not paid rent for that month. Use this report on the 8th to determine who should receive a non-payment of rent notice.

In Yardi:

- Click End of the Month Procedures at the top of the page
- Select “Review Aged Receivables”
- Report type is “Receivable Aging Detail”
- Enter your Property and Month/Year
- Click “Display”

Affordable Aging Detail
Property: 09/01/2018
Age as of: 09/01/2018
Post To(MM/YY): 09/2018

Tenant	Tran#	Date	Month	Charge Code	Charge Amount	Currently Owed	0-30 Owed	31-60 Owed	61-90 Owed	Over 90 Owed	Pre-payments	Suspense	Remarks
(t0009809)													
- 005 - Current	C-772644	09/01/2018	09/2018	rub	60.00	60.00	60.00	0.00	0.00	0.00	0.00	0.00	Utility Reimbursement (09/2018)
Total					60.00	60.00	60.00	0.00	0.00	0.00	0.00	0.00	
(t0009224)													
- 009 - Current	C-772846	09/01/2018	09/2018	parking	35.00	35.00	35.00	0.00	0.00	0.00	0.00	0.00	Parking/Garage/Carport (09/2018)
- 009 - Current	C-785714	09/05/2018	09/2018	late	76.40	16.40	16.40	0.00	0.00	0.00	0.00	0.00	Late Fee
Total					111.40	51.40	51.40	0.00	0.00	0.00	0.00	0.00	
(t0017725)													
- 013 - Current	C-767453	08/14/2018	08/2018	secdep	2,090.00	757.67	757.67	0.00	0.00	0.00	0.00	0.00	Security Deposit
Total					2,090.00	757.67	757.67	0.00	0.00	0.00	0.00	0.00	
(t0013824)													
- 015 - Current	C-753386	08/01/2018	08/2018	rub	60.00	11.30	0.00	11.30	0.00	0.00	0.00	0.00	Utility Reimbursement (08/2018)
- 015 - Current	C-772653	09/01/2018	09/2018	rub	60.00	60.00	60.00	0.00	0.00	0.00	0.00	0.00	Utility Reimbursement (09/2018)
Total					120.00	71.30	60.00	11.30	0.00	0.00	0.00	0.00	
(t0001767)													
- 021 - Current	C-633005	01/10/2018	01/2018	other	50.00	50.00	0.00	0.00	0.00	50.00	0.00	0.00	Smoking violation fee
- 021 - Current	C-687916	04/05/2018	04/2018	late	102.50	92.50	0.00	0.00	0.00	92.50	0.00	0.00	April late fee
- 021 - Current	C-727867	06/05/2018	06/2018	late	102.50	102.50	0.00	0.00	102.50	0.00	0.00	0.00	late fee
- 021 - Current	C-746215	07/06/2018	07/2018	late	102.50	102.50	0.00	102.50	0.00	0.00	0.00	0.00	Late Fee
- 021 - Current	C-753391	08/01/2018	08/2018	rub	60.00	60.00	0.00	60.00	0.00	0.00	0.00	0.00	Utility Reimbursement (08/2018)
- 021 - Current	C-767614	08/05/2018	08/2018	late	102.50	102.50	102.50	0.00	0.00	0.00	0.00	0.00	late fee
- 021 - Current	C-787947	07/24/2018	09/2018	other	50.00	50.00	0.00	50.00	0.00	0.00	0.00	0.00	Smoking violation
- 021 - Current	C-772659	09/01/2018	09/2018	rub	60.00	60.00	60.00	0.00	0.00	0.00	0.00	0.00	Utility Reimbursement (09/2018)
- 021 - Current	C-784632	09/05/2018	09/2018	late	102.50	102.50	102.50	0.00	0.00	0.00	0.00	0.00	Late Fee
Total					732.50	722.50	265.00	212.50	102.50	142.50	0.00	0.00	
(t0002033)													
- 034 - Current	C-749981	07/01/2018	08/2018	premium	100.00	100.00	0.00	0.00	100.00	0.00	0.00	0.00	month to month fee
- 034 - Current	C-753184	08/01/2018	08/2018	premium	100.00	100.00	0.00	100.00	0.00	0.00	0.00	0.00	Premium Rent (08/2018)
- 034 - Current	C-772463	09/01/2018	09/2018	premium	100.00	95.00	95.00	0.00	0.00	0.00	0.00	0.00	Premium Rent (09/2018)
Total					300.00	295.00	95.00	100.00	100.00	0.00	0.00	0.00	

Date and Month Posted

Available Prepays

Site Office Operations



Update rents when lease renewals come in to help ensure rents are being charged correctly.

Review Rent Roll with Lease Charges

Use this report to ensure we are charging the correct rents before Monthly Posting. You can find their current charges under Type of Monthly Charge (Charge Code) and Amount. Timely Rent Roll corrections improves vacancy loss accuracy, eliminates complicated corrections after month end, and helps avoid embarrassing mistakes with residents.

In Yardi:

- Click End of Month Procedures
- Select “Review Rent Roll with Lease Charges”
- Report type is “Rent Roll with Lease Charges”
- Enter your Property, First day of the next month and the next Month/Year
- Click “Display”

Rent Roll with Lease Charges

As Of = 10/01/2018
Month Year = 10/2018

Unit	Unit Type	Unit Sq Ft	Resident	Name	Market Rent	Charge Code	Amount	Resident Deposit	Other Deposit	Move In	Lease Expiration	Move Out	Balance
Current/Notice/Vacant Residents													
A10907	1B1BASQ	623.00	t0017328		1,100.00	rent	1,125.00	1,125.00	0.00	06/23/2018	05/31/2019		0.00
						rub	50.00						
						Total	1,175.00						
A10909	1B1BASQ	623.00	t0000408		1,100.00	rub	50.00	830.00	0.00	01/02/2015	08/31/2019		0.00
						rent	1,125.00						
						Total	1,175.00						
A10911	1B1BASQ	623.00	t0012647		1,100.00	rent	1,070.00	1,070.00	0.00	01/09/2018	12/31/2018		1,227.00
						rub	50.00						
						Total	1,120.00						
A10913	2B1BASQ	852.00	t0014079		1,200.00	rent	1,175.00	587.50	475.00	04/27/2018	03/31/2019		0.00
						rub	60.00						
						Total	1,235.00						
A10915	2B1BASQ	852.00	t0017965		1,200.00	rent	1,295.00	945.00	0.00	08/27/2018	07/31/2019		0.00
						rub	60.00						
						Total	1,355.00						
A10917	2B1BASQ	852.00	t0001557		1,200.00	rub	60.00	1,025.00	475.00	05/22/2015	05/31/2019		0.00
						rent	1,175.00						
						Total	1,235.00						
A10919	2B1BASQ	852.00	t0010006		1,200.00	rub	60.00	820.00	475.00	11/15/2013	12/31/2018		0.00
						rent	1,200.00						
						Total	1,260.00						
A10921	2B1BASQ	852.00	t0010007		1,200.00	rub	60.00	895.00	475.00	04/26/2014	03/31/2019		0.00
						rent	1,200.00						
						Total	1,260.00						
A10923	2B1BASQ	852.00	t0008661		1,200.00	rub	60.00	612.50	0.00	07/01/2017	06/30/2019		0.00
						rent	1,225.00						
						Total	1,285.00						

Unit and Tenant Code

Collected Resident Deposits

Always use professional language and a neutral tone when describing site business.

The Weekly Manager Report

The **Weekly Manager Report** is a one-page report (Form C320 on [Tenant Tech](#)) to be completed on Friday of every week, accounting for that week’s business—Saturday through Friday. Once completed, the Weekly Manager Report should be emailed to the Site Supervisor and managerreports@cambridgeres.com. The report is considered late if it is not received by the following Monday.

Use professional language and a neutral tone when describing site business.

The [Manager Log](#), [Marketing Scorecard](#), and [Maintenance Log](#) will contain all the information necessary to complete the Weekly Manager Report.

Step 1: Transfer from Current—Use the Transfer from Current button to move the Current Week statistics to the Previous Week Column.

Step: 2

Step: 1 Transfer from Current For week ending Friday: 09/31/2018

	PREVIOUS WEEK	CURRENT WEEK	MONTH-TO-DATE
MARKETING			
Telephone Calls Received	4	2	45
Tours of Property by Prospective Residents	1	2	13
MOVE-OUTS			
Total Move-Out Notices (Due to Rent Increase)	0 (0)	0 (0)	5 (0)
Rent Increase Notices Distributed (Combined Value)	0	2 (\$105)	2 (\$105)
MAINTENANCE			
Apartment Turnovers Completed	2	1	7
Maintenance Requests Completed	1	2	44
Preventive Maintenance Inspections Completed	0	0	0
Preventive Maintenance Follow-Up Service Completed	0	0	0

Step: 3

Step: 4

Step 2: Change the Date—Change the date to the Friday of the week the Weekly Manager Report is due.

Step 3: Enter the Current Week’s Data—Enter the current week’s data in the Current Week Column for Marketing, Move-outs, and Maintenance using the [Marketing Scorecard](#), [Manager Log](#) and [Maintenance Log](#). Include financial totals in the Move-out Section in parenthesis.

Site Office Operations

Pay special attention to the numbers during weeks when the month changes.

Step 4: Adjust the Month-to-Date Column—Add the Current Week total to the Month-to-Date total for each horizontal data line. The Month-to-Date column should account for the total for each line for the entire month up to and including the Friday of the report.

Note: Not all of the Current Week total will be included in the Month-to-Date column during weeks when the month change occurs mid week. Only the events which occurred during that month should be included in the Month-to-Date column. For example, as in October of 2018, the new month began on Monday of the week being reported. Data from Saturday and Sunday should not be included in the Month-to-Date column for that week. The total from Saturday and Sunday will, however, need to be included in the October Monthly Manager Report.

Weekly Manager Report (C320)

Transfer from Current For week ending (Friday): 10/03/2018

MARKETING	PREVIOUS WEEK	CURRENT WEEK	MONTH-TO-DATE
Telephone Calls Received	4	9	5
Tours of Property by Prospective Residents	4	5	3

The Month to Date column may be less than the Current Week column when the new month begins mid week.

Step 5: Complete the Text Fields—Complete the text fields Rental Activity/Marketing, Resident Issues, Property Maintenance, Staff, and General Operations.

- ➔ **Rental Activity/Marketing**—Include information about all applications received, signed Agreements to Execute, new rentals, traffic, applicant's responses to tours, qualified prospects, why they chose not to lease, and suggestions for the following week.
- ➔ **Resident Issues**—Describe any significant interactions with residents such as notices sent, conversations regarding issues on property, property wide notices, and eviction proceedings.
- ➔ **Property Maintenance**—Discuss significant landscaping and maintenance progress, issues or accomplishments in the past week including activities like capital improvements, larger scale maintenance related items, mold and moisture issues, non-standard vendor activity, turn completion and maintenance staff accomplishments.
- ➔ **Staff**—List any staff issues, schedule conflicts, personnel changes, time off and noteworthy achievements.
- ➔ **General Operations**—Summarize the weeks events, record goals for the following week and month, comment on previous goals progress and completion, and make notes about upcoming events and property projects.

Site Office Operations

The Affordable Housing Supplement is completed by all RD/Tax Credit sites and sent to SERC no later than the 5th of the month.

Affordable Housing Supplement (Form C314 on [Tenant Tech](#))

To be completed by all Tax Credit and RD/Tax Credit Site Managers every month. Once completed, fax or email with the Monthly Manager Report to the Central Office prior to the 5th of every month. A copy is retained on site for future reference.

Information in this report includes statistics pertaining to recertifications, special set-asides, waiting list, and status of past-due recertifications. Much of the information can be found using the Resident Activity Detail report in [Yardi](#). Also, consider creating a FAFs file in Outlook to track approved FAFs returned by the Compliance Department.

Step 1: Transfer from Current—Use the Transfer from Current button to move the Current Month statistics to the Previous Month Column.

Step 2: Change the Date—Change the date to the last day of the month the report is for.

Step 3: Enter Current Month’s Data—Enter the data in the Current Month Column.

Step 4: Adjust Year-to-Date—Add the Current Month column totals to the Year-to-Date totals.

Step 5: Complete the Text fields—Complete the remaining text fields.

Step: 2

Step: 1 Transfer from Current

For Month Ending: 07/31/2018

	PREVIOUS MONTH	CURRENT MONTH	YEAR-TO-DATE	
RECERTIFICATION	Number of Completed Recertifications	19	24	44
	Number of Post-Due Recertifications (complete section below)	0	0	Not Applicable
	Number of Recertifications in Process	10	6	Not Applicable
DEEP SKEWED	Required Number of Deep Skewed Units	12	12	Not Applicable
	First of the Month Number of Occupied Deep Skewed Units	12	12	Not Applicable
	First of the Month Number of Vacant Deep Skewed Units	0	0	Not Applicable
	End of the Month Number of Deep Skewed Units	12	12	Not Applicable
	Households Exceeding 80% of Area Median Income			Not Applicable
WAITING LIST	First of the Month Waiting List Length (Number of Names)	24	28	28
	End of the Month Waiting List Length (Number of Names)	28	18	18

Don't be afraid to test the market with higher than expected rental rates. You may be surprised what people are willing to pay.

Rent Increase Process

Recommendations & the Lease Expiration Worksheet

All conventional properties and selected tax credit properties (check with your Property Supervisor) are provided with a **Lease Expiration Worksheet** at the beginning of the year. The purpose of this form is to document future rent increases upon lease expirations. The form is completed as follows:

1. **Complete the Fields**—Using a Rent Roll report from Yardi, complete the fields for residents who are due to receive a lease renewal offer on or slightly before the 26th calendar day of the month.
 - **Budget Market Rent** and **Budget RUB** can be found on the first pages of your property's budget. Use the year end budgeted amounts in the Lease Expiration Worksheet.
 - **Re-Rent Price Today** equals the current rent price if that unit was available to rent, normal turnover work presumed. See more on how to set Rent Prices at your property.
2. **Rent Increases**—Determine the amount of the future rent increase and record this information on the Lease Expiration Worksheet.
 - **Determining Increases**—As a general rule, renewal rates are kept below current Re-Rent Prices by a flat amount (usually \$30 to \$50) or by a percentage (usually 3% or less). Contact your Supervisor to confirm your understanding of these guidelines.
3. **Email**—Email the completed Lease Expiration Worksheet to your Supervisor by the end of the third week of every month. (See the [Calendar](#) for specific dates.)
4. **Approval**—Your Supervisor will contact you typically within three business days with approval or revisions.
5. **Post**— Once approved, Site Staff can post and mail renewal offers (Renewal Letters can be found on Tenant Tech) to residents no later than the 28th of the month.
6. **Track** – Enter end date of current rent in Yardi and enter new rent amount and beginning date of new rent in Yardi.
7. **Execute** – Coordinate effectively to execute all new fixed-term rental agreement (or month-to-month) with households by the noted deadline on the renewal offer letter (typically by the 20th day of the month prior to the new rent becoming effective).

Don't be afraid to test the market with higher than expected rental rates. You may be surprised what people are willing to pay.

Requirements/Restrictions

Requirements/Restrictions can vary by State and sometimes even County. Generally, properly informing an existing household of a change in their monthly rent involves the following

State determined but generally a 90-day posted and mailed notice of rent increase. (Remembering to post, mail, and email caseworker if resident receives Housing subsidy.)

Do not exceed allowable rent increase limits in your area/region (defined on your Lease Expiration worksheet).

Determining Rental Rates

At Affordable Properties, rental rates are set by an outside party, but at Conventional Properties rental rates are determined by market conditions, and interpreted by members of the property management company. There are a number of ways to find the “right” price. Use the following tools to help keep your property’s rental rates competitive. As always, work with your supervisor accordingly if you’re unsure of how best to price.

- **Competitor Pricing**—Call your competitors and ask for their current rental rates. Shop your competitors and get pricing information and an idea of the quality of their apartments. Ask your Portfolio Supervisor to generate a reports from Costar.
- **Shut it Down**—This method is best used when availability is low. Set your new rent higher than you think you can get. Track the number of incoming calls, dropping the rate until the phone starts ringing with qualified prospects.
- **Step it up**—Increase the rental rate as each apartment comes available. Track traffic to determine when you’ve reached the “Market Ceiling”. Note that adjustments should probably be equal to 3% to 5% above the previously achieved high rent.
- **Amenity Pricing**—No two apartments are the same. It’s important to recognize the differences between apartments and price accordingly. Factors include location, quantity of natural light, age of interior finishes – just to name a few.

Month-to-Month pricing—If a household elects to transition to a month-to-month status, this should be in accordance with the noted rental rate for the month-to-month option on the renewal letter. The month-to-month rental rate will commonly be the highest priced option offered, but still compliant with the maximum rent increase permitted in your area/region.

Make note of all changes in Rent Prices in your Manager Log so there's evidence of Fair Housing Compliance.

Mailing Paperwork to the Central Office

- Items mailed to the Central Office should be sent using a large manila envelope.
- Address the envelope using the stamp with Cambridge's P.O. Box address.
- Stamp the upper-left corner of the envelope with a the site's address
- When sending multiple items in one envelope, use a colored sheet of paper to separate each group of items. *For example:* Move-out Paperwork, colored paper, Invoices, colored paper, Move-in Paperwork.
- Postage can be paid for at the post office. Often there are kiosks available with little wait time or it can be paid at the counter. If it is more convenient to use stamps, be sure to use a postage scale for accuracy.



Proof read every email before you hit the send button to avoid embarrassing mistakes.

Email Etiquette and Guidelines

Email is a key part of the workplace, and your emails can make lasting impression on those you communicate with. The following is a guide to simplify and maintain a professional appearance and tone in your online communications.

General Guidelines - Basics tips to keep communications professional and useful.

- Make your subject line relevant to the content of your email.
- Don't break email chains. Once an email chain on a specific topic has been started use Reply to keep the associated emails together in a chain. Starting a new email chain may result in information being lost or more difficult to locate.
- Think carefully before you hit Reply to All. Everyone who received the original email will also receive your response.
- Consider every email you send to be available to the public. Keep it professional at all times. You never know who may end up reading what you've written.
- Learn to electronically file the emails you receive. This can be invaluable in recovering conversations long after you thought they were over. Contact your Supervisor or Blackpoint IT to learn more.
- Keep your language and content work appropriate. Avoid inappropriate humor or other offensive material. Avoid emotional language. Don't use emoticons and keep the use of abbreviations to a minimum to ensure everyone easily understands your message.
- Proof read every email before you hit the send button. You might be surprised how often you catch errors or correct confusing sentences.
- Use a professional font. Avoid using fancy script or color in email text. Never use all caps. It's the text equivalent of yelling.
- Be concise. Avoid long sentences.
- Use proper spelling, grammar and punctuation.
- Respond swiftly.
- Respond to every question and try to pre-empt future questions.
- Use the cc: field sparingly.
- Avoid using Urgent or Important. If it is urgent or important it may be best to follow your email with a phone call.
- Don't attach unnecessary files.
- Don't request delivery or read receipts.
- Don't include confidential information in your emails.
- Don't forward questionable or suspicious emails as they may contain viruses.
- Don't Reply to Spam

For the complete policy on email usage, please refer to the Employee Policy Manual.

You're **Signature Block** might seem like a small detail, but it can make an impression on those who see it.

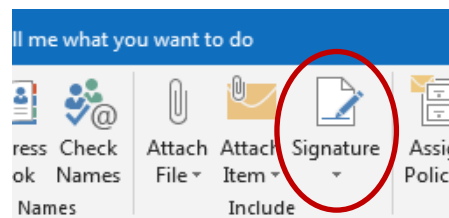
Signature Block (Outlook)

Every employee that uses email as part of their job is expected to use a Signature Block. They are simple to make, provide important information to those you're contacting and keep your correspondence looking professional.

Use the following format:

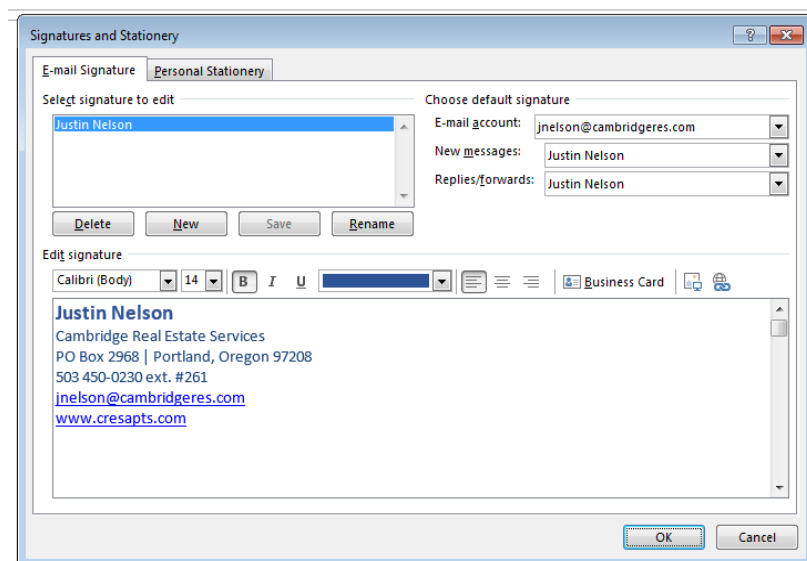
(Example)

Your name	Mary Manager
Title	Property Manager
Property Name	Happy Apartments
Property address	1234 Oak Street Happy Hills, OR 97005
Office Telephone number(s)	(503) 848-1235 phone
Afterhours Emergency Number	(503) 911-9911
Fax number(s)	(503) 848-1236 fax
Your email	happy@cresapts.com
Property website	www.cresapts.com/happyapartments
Link to tours	Check Out Our 3D
Tours Here!	
Link to Apply Online	Apply Online Today!



Here are step-by-step instructions for creating and editing a signature block:

1. Open a new email message.



2. Select **Signature > Signatures** from the menu.

3. Under **Select signature to edit**, choose **New**, and in the **New Signature** dialog box, type a *name* for the signature.

4. Under **Edit signature**, compose your signature. You can change fonts, font colors, and sizes, as well as text alignment. You can add links and images to your email signature, change fonts and colors, and justify the text using the mini formatting bar under Edit signature.

5. Under **Choose default signature**, set the following options for your sig-

Make sure to have all the information someone might need to get in touch with you included in your Signature Block.

6. Your signature should be added to all new messages by default, in the **New messages** drop-down box, select one of your signatures.
7. Your signature should appear in the messages you reply to and forward. Under **Replies/ forwards** drop-down in the Signatures box, select your signature.
8. Choose OK to save your new signature and return to your message. Outlook doesn't add your new signature to the message you opened in Step 1, even if you chose to apply the signature to all new messages. You'll have to add the signature manually to this one message. All future messages will have the signature added automatically. To add the signature manually, select **Signature** from the **Message** menu and then pick the signature you just created.

Out of Office Assistant (Outlook)

Your office isn't likely to be closed for long periods of time, but on holidays and those rare occasions this can be useful way to let people know that you're unavailable and will get back to them as soon as you return.

The Out of Office Assistant will alert individuals to your absence when they attempt to send you an email. Your message should state that you're out of the office, when you expect to return, and who to contact in your absence in case of an urgent matter.

Directions for Outlook Web Users

1. **Open Outlook**
2. Click on "**File**" in the upper left corner of the screen.
3. Select "**Info**" if not already selected.
4. Select "**Automatic Replies (Out of Office)**"
5. Switch from "Do not send automatic replies" to "**Send automatic replies**"
6. Check the box for "**Only send during this time range:**" and enter the period you're of-
fice will be closed.
7. **Type a message** in the fields for "Inside My Organization" and "Outside My Organiza-
tion".
8. It's not necessary to include a Signature if you already have one set to be included in
email replies automatically.

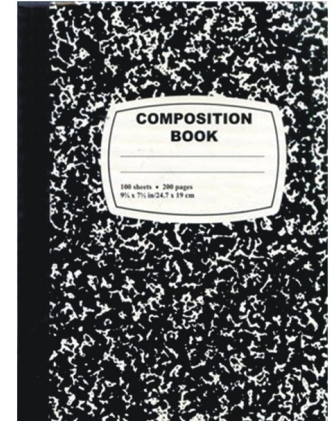
The Out of Office message will automatically stop being sent after the End date and time have passed.

Manager Logs are incredibly useful in providing information in case of a dispute, and far more reliable than memory. Keep yours up to date.

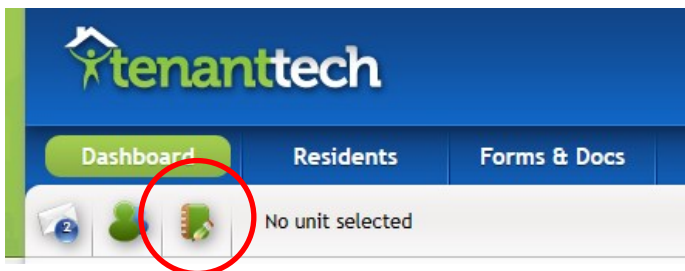
The Manager Log

The Manager Log is one of the most important tools in the Manager tool kit. Use it to document resident issues and conversations, notices, pricing, concessions, and discount changes as well as any other major activities at your property.

The information kept here can be used for numerous things, including routine responsibilities like filling out your Weekly Manager Reports, the less routine request for a violation letter, and the uncommon defense of a Fair Housing Dispute. In any case, it's an invaluable tool for retrieving accurate and detailed information that might otherwise be difficult to recall.



- New manager logs start on January 1st of every year.
- Use a black and white composition book or a hardback diary. They can be purchased



through your properties [Office Depot](#) account. (Item #1394524)

- **Employees are encouraged to use the digital Manager Log in Tenant Tech**
- Label the book with your property's name and the year.
- Only use pen to write in the Manager Log and never use white out.
- Make a dated entry every day, even if the entry is just to record that your office was closed.
- Use factual, succinct and professional language.
- Include sufficient detail to be of value at a later date, such as full names of the individuals involved, date and time of incident, description of the incident, witnesses or other supporting data.

Send Petty Cash in for reimbursement at least once a month. Make it a routine practice.

Check Request

In an emergency situation where a payment must be made without an invoice Site Managers may submit a special check request.

- All check request forms *must* have Supervisor approval before sending to Accounts Payable.
- To request a check, contact your supervisor with necessary information.
- Check requests must be made payable to the vendor performing the services or providing the product.
- No check requests can be made payable to the Site Manager without approval from the Supervisor.
- Check Requests require proof of tax identification number and the correct address for all vendors.
- In the event the vendor is providing services (not supplies), proof of insurance is also required.

Petty Cash

Petty Cash Envelopes can be ordered through [Tenant Tech](#) using Form C000.

Petty cash is used for payment of non-routine, small miscellaneous items or services of a general nature for which total payment to a single non-vendor does not exceed \$100. The back of the Petty Cash Envelope lists items commonly purchased with Petty Cash.

When a new Site Manager begins working at a property, the property's Supervisor is responsible for setting up the Petty Cash Account. Most Petty Cash accounts have an approximate balance of \$2 per unit rounded to the nearest \$100. For example, if you manage a community of 100 units the Petty Cash account would be \$200.

Petty Cash can be maintained in the form of cash or in a checking account if the account can be opened in a cost-effective manner. When opening a bank account, the account is to be in the name of the Site Manager and should include "Petty Cash Fund" under the name. The Site Manager should be the only signer on the account. It is important that the Petty Cash funds are not co-mingled with personal funds. Do *not* open a checking account using the property's name.

The Site Manager is responsible for all expenditures, reconciliation of funds, and any shortages. It's recommended that Petty Cash be submitted at least once per calendar month or when the account balance is 50% of the total fund. It can take up to 10 days to receive reimbursement, so plan accordingly.

Site Office Operations

Site Managers should not advance personal funds to the Petty Cash fund in event of a shortfall.

Site Managers should not advance personal funds to the Petty Cash fund in event of a shortfall.

Petty Cash will not be reimbursed without an acceptable receipt. Store your Petty Cash receipts in a safe location until its time to send them in.



Petty Cash May be Used in the Following Circumstances

- For coded items on the reverse side of the Petty Cash Envelope.
- Evictions and other legal costs that do not exceed \$100—if local law *requires* cash payment of filing costs.
- Mileage expenses of \$100 or less, per employee. A Mileage Record form must be completed, signed by the Site Manager and used as a receipt. Mileage must be submitted monthly. Do not submit multiple month's mileage payments for the same person on one Petty Cash request.

Petty Cash May Not be Used for the Following

- Security Deposit refunds
- Employee advances for payments to other individuals
- Wage advances or loans to employees
- Employee gifts for birthdays, weddings, etc.
- Labor of any kind. Labor must be processed through payroll or an outside vendor.
- Any items over \$100 must be purchased through a vendor using a Special Check Request.
- Refunding overpaid resident rent.

Keep Petty Cash receipts in a secure location.

How to Complete the Petty Cash Request Envelope

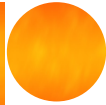
Be sure to fill out the envelope completely.

1. Record and code purchases on the front of the envelope using the codes from the reverse side.
2. Tape all receipts to a plain white 8-1/2 x 11 sheet of paper in the order listed on the envelope.
3. Add all the receipts with an adding machine to produce an adding machine tape record.
4. Make a copy of the receipts for your records.
5. Place the receipts in the envelope.
6. Add the amounts listed on the envelope and check them against the amount on the adding machine tape.
7. If correct, attach the adding machine tape to the top left corner of the Petty Cash envelope.
8. Print your full name clearly on the envelope and sign the envelope, approving the receipt list and expenses.
9. Make a copy of the front of the envelope and attach it to the copies of the receipts and file it in the Petty Cash File. (see more about the Petty Cash File [here](#))
10. Reimbursement requests for Petty Cash are processed through Yardi as an Invoice and made payable to the Site Manager. Refer to the [Yardi Voyager Residential Procedures Guide](#) for instructions on entering invoices.

Processing your Final Petty Cash Reconciliation

When you leave a property, it's necessary to "close out" Petty cash so a new check can be issued to the new Site Manager. Petty Cash should be closed out no later than the last working day of the exiting Manager. Reconcile all receipts; a check from the Petty Cash Account must be made out to Cambridge RES for the balance of the account and placed in the Petty Cash envelope with the receipts. Mark the front of the envelope with the words, "Closed Out."





Site Managers and other community staff members can be reimbursed for mileage used to complete their daily property errands.

Office Supplies (Office Depot)

An Office Depot Business account has been set up for all properties to benefit from the corporate pricing and delivery of supplies to your property.

Not having something when you need it can be frustrating and time consuming. Keep your office stocked with the supplies necessary to keep the business running smoothly using the following suggestions.

- Take office supply inventory at least once a month.
- Keep of list of items that are running low.
- Don't wait until it's gone to order more.
- Orders should be placed after reviewing your office supply inventory.
- Orders are placed online at [Office Depot](#)
- Financial review of the office expense account must be taken into consideration before placing orders to avoid over spending.
- Obtain Supervisor approval prior to purchases exceeding \$300.

Mileage Reimbursement

The **Mileage Record** (Form C021) can be found on [Tenant Tech](#).

Site Managers and other community staff members can be reimbursed for their daily property errands such as going to the bank, post office, picking up parts, and filing evictions. If you have questions about a specific situation which requires travel, please contact your Supervisor or Supervisor.

- The Mileage Record must be completed in its entirety and submitted monthly as a Petty Cash receipt before the month end close date.
- Enter mileage on the day the mileage is driven.
- Mileage *cannot* be saved and submitted quarterly.
- Mileage is reimbursed at the rate listed on the Mileage Record report.
- When the mileage rate changes, all properties will be notified of any change in the mileage rate, and the form updated.
- Mileage is paid for after-hour maintenance calls if the Maintenance Tech does not live on-site at the property where the emergency occurred.

A standard file format is established for consistency and is especially important should your property be audited.

File Format

It's important to follow the required format for all resident file types. A standard format is established for consistency and is especially important should your property be audited. The following is a list of file types and the required format:

Current Resident Files

All Current Resident Files are set up in the same manner. Label each resident file with the Apartment Number and Unit Type if using the pressboard folder. The resident's surname can be included if using manila folders.

- **Conventional Properties** — letter size, two-section file folders with fasteners; a regular manila folder can be used or a pressboard folder, which can be recycled each time a new resident moves in. [Office Depot](#) Item #207126 (Manilla box of 50)
- **Section 42** — letter size, pressboard, four-section file folders with fasteners. [Office Depot](#) Item #782165 (box of 10)
- **RD** — letter size, pressboard, four-section file folders with fasteners. [Office Depot](#) Item #782165

Conventional Property File Order

Each Current Resident File should contain all required leases, addenda, copy of application, screening results and proof of income (if applicable).

Place contents of the resident files in the appropriate order as described below:

Left side

- ✓ Resident Conversation Sheet — on top
- Add the following items on the left side of the file as they occur:* [Tenant Tech](#) form C482
- ✓ General correspondence — such as past due notices, etc.
 - ✓ Nonpayment Notices
 - ✓ Violation Letters
 - ✓ 24 Hour Notices
 - ✓ Utility Set Up/Termination (received at move in)
 - ✓ Application
 - ✓ Screening Approval
 - ✓ Proof of Income (if applicable)
 - ✓ Unit Condition Report
 - ✓ Original Guest Card

Right side (ordered from top to bottom)

- ✓ Current Rental Agreement
- ✓ Previous Rental Agreements
- ✓ Security Deposit Payment Agreement (if applicable)
- ✓ Agreement to Execute a Rental Agreement
- ✓ Pet Agreement (if applicable)
- ✓ All other Addenda
- ✓ Proof of Renters Insurance (if applicable)

Current Resident Files should contain all required leases, addenda, copy of application, screening results and proof of income (if applicable).

Tax Credit Property File Order

The information within the first two sections of the file are occupant specific. They are removed at the time of move-out., placed in an envelope, labeled with the resident's last name and move-out date, and filed alphabetically by last name.

First Opening of Multi-Part File

Left Side (first document inserted is oldest)

- Original Move-in Lease and Lease Addendums
- Most Current 2 years of subsequent leases or Rent Change Letters

**All other lease paperwork to be archived*

If the resident receives **Section 8 assistance**, the initial lease and any interim modifications affecting rent portions are included in this file section in date order, oldest below the newest.

Right Side

- Original Move-in Certification
- TIC
- Income Worksheet
- Tenant Income Questionnaire
- Income Verifications
- Child Support Affidavit
- Asset Verification –or– Under \$5K Form
- Student Affidavit
- Unemployment/Zero Income Certification (if applicable)
- VAWA
- Other
- Other
- Other

Right Side

- AR Certification Date
- TIC
- Income Worksheet
- Tenant Income Questionnaire
- Income Verifications
- Child Support Affidavit
- Asset Verification –or– Under \$5K Form
- Student Affidavit
- Unemployment/Zero Income Certification (if applicable)
- VAWA
- Taxes
- Other
- Other

Second opening of Multi-Part File

Left Side

- Emergency Contact Paperwork (separated by colored paper)
- Applications
- Background Screening

Right Side

- Tenant Correspondence
- * Work orders to be kept in the unit work order file.*

The newest income certification should be on top of income certifications completed earlier.

Rural Development Property File Order

The information within the first two sections of the file are occupant specific. They are removed at the time of move-out., placed in an envelope, labeled with the resident's last name and move-out date, and filed alphabetically by last name.

First Opening of Multi-Part File

Left Side (first document inserted is oldest)

- Original Move-in Lease and Lease Addendums
 - Most Current 2 years of subsequent Leases or Rent Change Letters (most recent on top)
- *All other lease paperwork is to be archived*

Right Side (first document inserted is oldest)

- Original Move-in Certification
- 3560-8
- TIC (if Available)
- HUD Estimated Calculation Worksheet
- Income Worksheet
- Tenant Income Questionnaire
- Income Verifications
- Child Support Affidavit
- Asset Verifications
- Affidavit of Medical Expenses
- Medical Expense Verifications
- Student Affidavit
- Unemployed/Zero Income Certification
- VAWA
- Wage Match Form
- Initial Notice

Right Side (first document inserted is oldest)

- AR Certification
- TIC (if Applicable)
- HUD Estimated Calculation Worksheet
- Income Worksheet
- Tenant Income Questionnaire
- Income Verification
- Child Support Affidavit
- Asset Verification
- Affidavit of Medical Expenses
- Medical Expenses Verification
- Student Affidavit
- Unemployed/Zero Income Certifications
- VAWA
- Wage Match Form
- Initial notice
- 120, 90, 60 Day Notices

Second Opening of Multi-part File

Left Side

- Emergency Contact Paperwork
(separation by colored paper)
- Applications
- Background Screening

Site Office Operations



Leases over two years old, not including the original move-in lease and addendums should be archived.

(separation by colored paper)

- Photo ID
- SS Cards
- Birth Certificates
- Save (if applicable)

Right Side

- Tenant Correspondence
- *Work orders to be kept in a separate file*

HUD Property File Order

First Opening of Multi-Part File

Left Side (first document inserted is oldest)

- Original Move-in Lease and Lease Addendums
 - Most current 2 years of subsequent leases or Rent Change letters
- (All of the lease paperwork is to be archived)

Ride Side

- Original Move-in Certification
- 50059
- EIV Existing Tenant Search
- HUD Estimated Calculation Worksheet
- Income Worksheet
- Tenant Income Questionnaire 9887/9887A
- Income Verifications
- Child Support Affidavit
- Asset Verifications
- Medical Expense Verifications
- Student Affidavit
- Unemployed/Zero Income Certification
- VAWA
- HUD Forms Acknowledgment
- Hardship Waiver (only if min \$25 rent)
- Initial Notice

Ride Side

- AR Certification
- 50059
- HUD Estimated Calculation Worksheet
- Income Worksheet
- Tenant Income Questionnaire
- 9887/9887A
- EIV
- Income Verification
- Child Support Affidavit
- Asset Verification
- Medical Expense Verifications
- Student Affidavit
- Unemployed/Zero Income Certification
- VAWA
- Hud Form Acknowledgement
- Hardship Waiver (only if min \$25 rent)
- Initial Notice
- 120, 90, 60 Day notices

Current year Past Resident Files should be filed alphabetically in a section of your filing cabinet

Second Opening of Multi-part File

Left Side

- Emergency Contact Paperwork
- Applications
- Background Screening
- Family Summary
(separated by colored paper)
- Applicant Declarations
- Race & Ethnicity Forms
- Photo ID
- SS Cards
- Birth Certificates
- Save (if applicable)
- EIV Verified Printout

Right Side

- Tenant Correspondence
**Work orders to be kept in the unit work order file.*

Past Resident Files

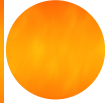
Current year Past Resident Files should be filed alphabetically in a section of your filing cabinet. After a resident moves out, transfer the completed move-out file to the yearly Move-Out file section and file in alphabetical order.

If regular manila file folders are used for resident files, the entire folder can be filed. If you are using the pressboard file folders or recycling manila file folders, remove the contents of the resident file and place in a large white catalog envelope [Office Depot](#) Item #331016 (9x12) or #331072 (10x13). Turning the envelope horizontally, starting at the upper left corner, label the envelope with the last name of the past resident, apartment number and move out date. Use the pressboard file for the new resident.

The file contents should be in the following order (top to bottom):

- Resident Move-out Statement
- Unit Condition Report
- Move-Out Inspection Worksheet
- Repair/Replacement Report
- All prior Rental Agreements, Addenda, and correspondence.

Past year Past Resident Files should be moved to a filing box and labeled with the year of move-out. Also mark, "Discard after (year)" on every box. The year will be 7 years from the move-out date.



Keep your Past Resident Files well organized and easily accessible. You'll likely need them to complete future rental references.

Denied/Cancelled Applications Files

Create folders for denied and cancelled applications in alphabetical order. For good file management:

- File the denied/cancelled applications by last name.
- Keep the current year's denied/cancelled applications in a filing drawer in the office.
- Past year's denied/cancelled applications should be stored in a filing box with the appropriate year. Mark "Discard after (month) (year)" on every box. (7 years from the date of the denial/cancel)

Apartment Maintenance Files

- With unit numbers printed on the tab of the folder, file Apartment Maintenance Files in apartment number order. They can be kept separate from or with resident files.
- Maintain files in a standard letter-size file folder — white copies of maintenance requests are filed on the left side with the most recent on top. All turnover paperwork, Capital Replacement Logs, Unit Condition Reports, Preventative Maintenance Reports, are filed on the right side with the most recent information on top.
- Invoice copies regarding turnover expenses are also filed on the right side
- Secure all paperwork using a two-hole punch

Vendor Files

- Although not required, some managers maintain Vendor Files and store copies of all vendor invoices
- Suggestions for filing: file folders or an accordion style file
- Suggested retention time: one year

Petty Cash File

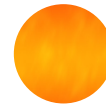
- Copy of all Petty Cash Envelopes; when the reimbursement check is received, staple the check stub on the front of the copy of the envelope
- Suggestions for filing: file folder or binder

Weekly Manager Reports

Depending on the size of your office, here are some suggestions for filing copies of all Weekly Reports:

- a large binder with tabs to separate the months
- accordion folder for the year, labeled, January—December; file folders or large envelopes.

Monthly Manager Reports kept in a clean three ring binder can be very useful during Owner visits to the property.



Confidentiality

All forms of documentation within our business offices (including computer systems) is confidential and must be respected as such.

Copies of documents signed by residents (applications, rental agreements, etc.) can and should be provided to the resident upon request.

If the resident signs compliance form, they can have a copy unless another entity fills it out with personal information, in which case the form could no longer be released.



Label file storage boxes clearly and keep them organized while in storage for quick and easy retrieval. It will save you time.

File Retention

It is important that site documents and reports are retained for specific periods of time. Each property should retain archived information at the property in a secure area. The following is a list of typical files/documents on site, the retention time and how to organize them.

Note: Always check with your supervisor prior to destroying documents at your property.

File/Document Type

Operational Files

Operational Files	Retention Time	Organized By
Guest Cards	Two years	Month of the App; last Name
Daily Traffic Logs	Two years	Date
Marketing Scorecards	Two years	Date
Manager Logs	1 year	Send to CRES 12/31
Rent Surveys	Two Years	Date
Weekly/Monthly Mgr. Reports	One Year	Date

Accounting Files

Yardi Receipt Batches	One Year	Date
Yardi Payables	120 Days	Date
Petty Cash Requests	One Year	Date

Resident/Applicant Files

Resident Files	7 years from Move-out Date	Year; Last Name
Denied/Cancelled Apps	7 Years from Denial/Cancel	App Year; Last Name
First year TC files	Forever	Apartment number
Apps removed from waiting list	7 Years from date of Removal	Date of Removal; Applicant's Last Name
Waiting Lists	7 Years from transfer to New	Date of List

Maintenance Files

Permanent Maint. Files	Forever	Date
Maintenance Logs	1 year	Send to CRES 12/31
Maintenance Requests	Forever in Maintenances Files	Date of Completion
Key Logs	Two Years	Date
Carpet Samples (damaged)	Six Months after Placement	Apartment Number; Date



Let your Supervisor know immediately when you receive an employee's notice to quit.

Help Wanted

Resignation Notice

It's the end of the month and your plate is overflowing, the phone rings and it's your best employee who says she just inherited her great Aunt Ethel's cruise line fortune and won't be returning to work. While replacing this employee will take a significant amount of time and energy, the hiring process is a team effort!

Upon receipt of an employee's resignation or when a new position is added, Human Resources will start the process of recruiting for the position.

The job of the designated Interviewer, in coordination with the Portfolio Manager will choose who to interview, and ultimately who to hire. The Interviewer is typically the Property Manager for site positions, and the Portfolio Manager for the Property Manager positions.

Human Resources

The Portfolio Manager will provide the details of the position to HR via a Personnel Requisition Form. HR will then take the following steps:

- Update job description, if necessary
- Place advertisement(s)
- Screen the resumes/applications
- Forward the resumes/applications that meet the minimum qualifications to the Interviewer

Advertisements

HR generally has a good idea of what type of advertising will be effective in targeting appropriate applicants, including:

- Craigslist
- Workable
- Local newspapers
- Colleges

However, if you have an idea for advertising that you think will reach the targeted audience, please let HR know.

Interviewer

Upon receipt of the resumes/applications from HR:

- Review the applicant documents
- If you have a resume, request the applicant submit an application prior to the interview

Consistency will help you compare candidates.

- Prepare for the interview
 - For consistency and to help compare applicants, each should be asked the same set of questions. HR can provide you with an interview template to utilize for the purpose of documenting each applicant's responses. Job-specific questions can be added, if necessary
 - Review the Interview Tips section
- Conduct a brief phone screening
- Conduct in-person interviews for the applicants who pass the phone screening

Know the Job Requirements

It's very important to review the job description thoroughly, so you know the knowledge, skills and abilities required for the position. Knowing what's required for an employee to be successful in the position will help you determine who is best qualified.

Just as you are seeking information about the applicant, the applicant will be seeking information about the position and the company. So, in addition to being prepared to discuss the job requirements, you should also be prepared to discuss Cambridge, the apartment community management industry and policies regarding workplace health and safety.

Know the Applicant

Review and familiarize yourself with the applicant's cover letter, resume, application and any other documents provided, prior to the interview. Ensure you have the applicant's documents and your notes available for reference.

Consider the Environment

Whether the interview is by phone or in person, the environment in which you conduct an interview is critical to the amount and accuracy of the information exchanged. Interviews should be conducted in private, away from noise and other distractions.

Phone Screening Interview

A 10 to 15 minute phone screening can serve as a time saving element of the interview and selection process. This step is used primarily to confirm whether an applicant's qualifications meet the minimum requirements to perform the job and warrant an in-person interview.

For example, a screening interview can confirm if the applicant has a valid driver's license, is able to travel as much as the job requires or can lift 50 lbs., etc. Interviewers can also use this opportunity to clarify other information on their documents or determine the applicant's wage requirements.

Set aside time and space to conduct interviews. Finding the right person for the job requires all of your attention.

Before closing the interview, inform the applicant of the next step in the hiring and selection process, by letting them know when they will be notified if they will receive a follow-up interview.

Preparation in the following areas will help lay the necessary groundwork for a successful and informative employment interview.

The Basic Do's and Don'ts of In-Person Interviewing

Below is an outline of what is and is not acceptable when conducting an interview. Please note this list is not all inclusive.

Do

- Be consistent with all applicants
- Review the job description prior to the interview
- Present an accurate picture of the position
- Ask job-related questions
- Take brief notes during interview, while listening to the applicant answer your questions
- Make eye contact
- Evaluate each applicant after the interview is concluded
- Be friendly, but professional
- Remain objective
- Allow the applicant time to think and answer the question
- Close the interview by providing the applicant the next steps in the hiring process

Don't

- Lose eye contact for long periods of time
- Look at your computer or phone
- Make judgements on one trait without having considered all traits
- Conduct yourself in a manner that is too friendly or too stern
- Let the applicant see that you favor or disfavor them
- Ask only closed-end questions which can be answered with yes or no
- Accept general answers – follow up by probing for more specific information
- Continue to talk when the applicant does not reply quickly
- Fail to listen to everything the interviewee says
- Ask inappropriate or illegal questions
- Make any promises of employment or promotion to applicant
- Provide any information regarding other applicants



Don't be afraid to go "off script" in an interview. The goal is to get to know the person you're interviewing.

How to Conduct Effective Interviews

Try using some of the following questions during your interview, along with job specific questions.

Why are you changing jobs?

Be wary of applicants who answer the question by providing negative information about their current or past employer.

What did you like best about your last job?

An applicant's answer to this question may give you insight into what the applicant values in a job.

If you could have made improvements in your last job, what would they have been?

The answer here is a good barometer of an applicant's creativity and general sensitivity.

What was the most interesting job or project you've had so far in your career?

This answer may give you an idea of whether the applicant prefers challenges or not.

Describe the best person you've worked with.

This illustrates the applicant's personality, and the qualities they admire.

What kinds of people annoy you most?

Frequently, the traits the applicant mentions do not apply to themselves.

Describe instances in past jobs where you had to reschedule your time.

This is the question you ask instead of, "Are you willing to work extra hours when the situation calls for it."

In which way would you like our company to assist you if we hire you?

Look for a balance here. Be wary of applicants who indicate they may need a lot of help or applicants who suggest they may not want any help.

Ask complex questions (questions without a yes or no answer) to get the most out of your interview time.

Questions Not to ask

There are laws in place to protect prospective employees just like Fair Housing protects renters. The following is a list of topics and questions which should *not* be asked during an interview.

Relatives/Marital Status

- ⊗ Unlawful Inquiries: Whether the applicant is married, divorced, separated, engaged, widowed, etc.
- ☑ Lawful Inquiries: None, except: “Do you have any relative employed by Cambridge, and if so, what are their names?”

Residence

- ⊗ Unlawful Inquiries: Names or relationship of persons with whom the applicant resides, and whether the applicant owns or rents a home.
- ☑ Lawful Inquiries: Inquiries about address to the extent needed to facilitate contacting the applicant.

Pregnancy

- ⊗ Unlawful Inquiries: All questions relating to pregnancy and medical history concerning pregnancy. For example: “Do you plan on having more children?”
- ☑ Lawful Inquiries: General inquiries regarding duration of stay on a job or anticipated absences (both to males and females). “Do you foresee any long-term absences in the future?”

Physical Health

- ⊗ Unlawful Inquiries: Overly general questions (“Do you have any handicaps?”), which would tend to divulge handicaps or health conditions that do not relate reasonably to the applicant’s fitness to perform the job. Questions such as, “What caused your handicap?” “What is the prognosis of your handicap?” “Have you ever had any serious illness?” or “Do you have any physical disabilities?” should be avoided.
- ☑ Lawful Inquiries: Questions that relate specifically to the job: “Can you lift 40 pounds?” “Do you need any special accommodations to perform the job you’ve applied for?” “How many days did you miss from work (or school) in the past year?”

Site Office Operations



Laws regarding hiring are just as important to follow as Fair Housing Law. Review what you can and cannot do carefully before beginning interviews.

Family

- ⊗ Unlawful Inquiries: Questions concerning spouse, or spouse's employment, salary, child care arrangements, or dependents: "How will your husband feel about the amount of time you will be traveling if you get this job?" "What kind of child care arrangements have you made?"
- ☑ Lawful Inquiries: Whether the applicant can meet specified work schedules. "Can you work overtime?" "Is there any reason why you can't be on the job at 7:30 a.m.?"

Photographs

- ⊗ Unlawful Inquiries: Requests that an applicant submit a photo at any time prior to hiring.
- ☑ Lawful Inquiries: Photographs may be requested after hiring for identification purposes.

Name

- ⊗ Unlawful Inquiries: Any inquiries about name that would divulge marital status, lineage, ancestry, national origin, or descent. For example: "If your name has been legally changed, what was your former name?"
- ☑ Lawful Inquiries: Whether an applicant has worked for another company under another name and if so, what name. For example: "By what name do the references you provided know you?"

Sex

- ⊗ Unlawful Inquiries: All. Examples: "Do you wish to be addressed as Mr., Mrs., Miss, or Ms.?" "Do you have the capacity to reproduce?" "What are your plans to have children?"
- Lawful Inquiries: NONE

Age

- ⊗ Unlawful Inquiries: Any questions that tend to identify applicants age 40 or older.
- ☑ Lawful Inquiries: "Are you 18 years of age?" "If hired, can you furnish proof of age?"

Education

- ⊗ Unlawful Inquiries: Any question asking specifically the nationality, racial, or religious affiliation of a school.
- ☑ Lawful Inquiries: All questions related to academic, vocational, or professional education of an applicant, including the names of the schools attended, degrees/diplomas received, dates of graduation, and courses of study.

Preparation is the key to successful interviews. Know the job. Know the law.

Citizenship

- ⊖ Unlawful Inquiries: Whether an applicant is a U.S. citizen. Any inquiry into citizenship that would tend to divulge the applicant's lineage, descent, etc.; "Are you a citizen of the U.S.?" "Are your parents or spouse citizens of the U.S.?"
- ☑ Lawful Inquiries: Whether the applicant can provide proof of eligibility to work in the U.S. after hiring. "If you are not a U.S. citizen, do you have the legal right to remain permanently in the U.S.?" "What is your visa status?"

National Origin/Ancestry

- ⊖ Unlawful Inquiries: Everything. "What is your nationality?" "What language is spoken in your home?"
- ☑ Lawful Inquiries: "What languages do you speak, read, or write fluently?" This is only legal when the inquiry is based on a job requirement.

Race/Color

- ⊖ Unlawful Inquiries: Any question that directly or indirectly relates to a race or color.
- Lawful Inquiries: None

Religion

- ⊖ Unlawful Inquiries: Any question that directly or indirectly relates to a religion. "What religious holidays do you observe?" "What is your religious affiliation?"
- ☑ Lawful Inquiries: None except "Can you work on any day of the week?", and only if relevant to the job.

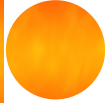
Organizations

- ⊖ Unlawful Inquiries: "To what organizations, clubs, societies, and lodges do you belong?"
- ☑ Lawful Inquiries: "To what professional organizations do you belong?"

Military

- ⊖ Unlawful Inquiries: Type or condition of military discharge. Request for discharge papers. (Note: In several states, veterans are a protected class.)
- ☑ Lawful Inquiries: Inquiries concerning education, training, or work experience in the armed forces.

Site Office Operations



Any direct or indirect questions relating to race or color are illegal.

Height/Weight

- ⊖ Unlawful Inquiries: Any inquiries not based on actual job requirements.
- ☑ Lawful Inquiries: Inquiries about the ability to perform a certain job.

Arrests/Convictions

- ⊖ Unlawful Inquiries: All inquiries relating to arrests. “Have you ever been arrested?”
- ☑ Lawful Inquiries: None. Due to “Ban the Box” legislation, it is better to offer the job to the most qualified applicant and determine through the background check process if they have a criminal history.



**Interview questions relating to arrests are prohibited.
Some questions regarding convictions are allowed.**

Maintenance Technician Testing

While we can evaluate some applicants based on experience and verbal abilities, qualified applicants for maintenance positions requiring technical skills are tested to determine technical knowledge and proficiency.

Applicants must complete the test at your property without reference materials. Before giving the test to the applicant, confirm that they up to 1½ hours available to take the test. If not, reschedule it for another date. Do not allow the applicant to take the test off the property. Control of the process is important to be fair to all applicants.

Forward completed tests to Human Resources via email for grading. After grading, test results will be provided to the Interviewer and the Property Manager.

The Applicant Becomes a Candidate!

Upon learning the name of the applicant, the Interviewer has chosen to hire, HR will create the documents for the applicant to complete to start the pre-employment process. Included in the pre-employment process is the background screening and drug screening process.

For candidates who will live onsite, HR will need to know the pertinent information including address, move-in date and monthly rent.

New Hire Documents

Upon receipt of the background and drug screen results, HR will prepare the new hire paperwork; Employment Understanding (EU), new hire documents, Employee Handbook, etc. and forward to the Supervisor for completion on the first day of employment.

Supervisor

The Supervisor will print the new hire documents, provide the new employee the time and place to complete them, review them for completeness and email the completed documents to HR.

Resumes and Applications

After the candidate has started work, email the Interview Templates and any other notes to HR. HR maintains application, resumes and other applicant documents for a minimum of 2 years. No applicant or employee documents are to be maintained at the properties.



Always review your ad to ensure it complies with Fair Housing Laws.

Marketing

Attention grabbing advertisements are crucial for attracting new prospects to your property.

- Be creative — create ads that stand out from the crowd
- Get to know your property's most appealing aspects — market them relentlessly
- Target your market — know where prospective residents work and where they shop
- Make the most of your advertising opportunities — be creative in how you get the word



out

The purpose of advertising is to:

- Attract qualified prospective renters
- Create and maintain a positive property image
- Maintain exposure for the property within the local community

When you place an ad, the ad location should be chosen based on:

- Who you're trying to attract
- Cost effectiveness
- Exposure and frequency of distribution



Often, an ad posted on Craigslist after 6PM will stay on the first page until the next morning, which means anyone looking in the evening will likely to see it!



Tips for Maintaining a Marketing Presence

We can't force our residents to stay no matter how wonderful a living space and community we provide. Sometimes they move-out, leaving us with empty apartments to fill. Make sure you're using every tool at your disposal to attract prospects to your property.

- **Maintain a presence online** - Post to Craigslist and other free sites *at least* three times a day.
- **Vary your ads** - Create several ads focused on different aspects of your property and rotate them. Not everyone is looking for the same thing.
- **Time your advertisements** - Post ads at a time when prospects are most likely to be looking: in the morning, the lunch hour, the evening and weekends. When would you be planning your apartment tours?
- **Consider paid advertising** – Check your budget to see how much is allocated for advertising or contact your supervisor.
- **Price Competitively** - Check your competitors' rates and make sure you're competitively priced. See [Determining Rental Rates](#) for more information about pricing your apartments.
- **Utilize your A-board** - Make sure you're A-board signs are in good shape and located where they'll get the most attention. Tie balloons to you're A-board to attract passersby.
- **Post [Referral Flyers](#)** from the eExchange on your residents' doors at least once a month and up to once a week. Keep Referral Flyers posted in your community room and have them available at your desk. Ask current residents if they'd like to take one when they come in for packages or pay their rent.
- **Consider using a mini-model** – Decorative objects can be placed around the apartment to give it a homey feel and can be moved from one apartment to another once a vacant unit has been rented. Looking for ideas—Contact your Supervisor.
- **Be Ready** – Be prepared to answer prospect phone calls and receive prospects at your office. Keep [Marketing Materials](#) printed and ready. Know your availability.
- **Self-evaluation** – Evaluate tours at your property. What can you do better? Shop your competitors. Ask other Cambridge Managers what works for them. Contact your Supervisor and ask for their advice.
- **A second or third opinion** – Invite your Supervisor, Supervisor, and even friends and family to evaluate the condition and appeal of your property.

Effective Marketing means using every available tool to attract potential residents to the property.

Marketing Materials

Brochures: Here's an easy way to remember when to give out one of your community brochures **“Give a tour; give a brochure!”**. These are a great takeaway for a prospective resident that was interested enough in your community to ask to see the apartments. There are floor plans inside the brochures and you can circle which floor plan you showed them as well as write in the rent, deposit amount, and anything else they might want to remember after the tour.

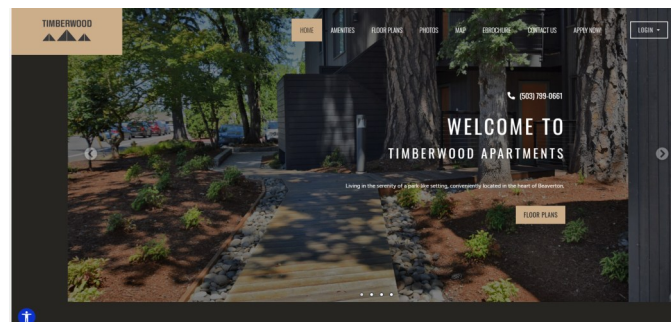
If you need more brochures contact your Supervisor for help.



Flyers: Every community has property flyers that can be printed directly from their website. These are great 1-page information sheets about your community that can be given out to prospective residents. It's a good idea to keep a small stack of these printed for people that walk in, but don't have time for a tour. These can also be left at local coffee shops, grocery store bulletin boards, or other places you might advertise. Remember, color is the Cambridge way! These flyers look best in color, if you only have a black and white printer in your office consider using petty cash to get some made at your local print shop, or request some from SERC.

You can print flyers from your Property's

Community Website: This is the number one marketing tool you have at your disposal. Direct people to your community website by adding it to your email signature, adding it to your Craigslist ads, and encouraging callers to take a look at your website if they'd like to know more about what your community has to offer. Review your Website regularly



Always have Marketing and Leasing Materials ready so you're prepared for the next person who walks through the door.



Resident Management

Business Cards: Always be prepared to take advantage of a leasing opportunity with your business card. If you are low or out of business cards you can order them directly from our print vendor. Your property information is already pre-loaded into the form and you just need enter in the individual's name.



[Business Card Order Form](#)



Community Flags: Many of our communities have colorful flags as a part of their marketing plan. Not all communities are allowed to display flags, banners or signs and you should know your city's rules/ordinances for these items.

Flags alternate every 6 months between the Spring/Summer version to a Fall/Winter version. The Central Office will place the order for your property twice yearly (April, October). You should receive emails with the ordering information from the Central Office if you have flags at your property.

If your flags are in disrepair, contact your Property Supervisor.

[CRES Flag FAQ and Installation instructions](#)
[Spring Flag Information](#)

Signs and Banners: Prospective renters keep their eyes open as they travel around the community. Be prepared to catch their attention with attractive well-placed banners and signs.



Sign ordering must be pre-approved by your supervisor.



Print flyers, floorplans and maps in color to make the best impression. If you don't have a color printer, find a nearby FedEx Office or other print store.

The Leasing (or “Product Knowledge”) Notebook

Using a Leasing Notebook can be extremely helpful. It's a great way to present your property to prospects, especially when you don't have any vacant apartments ready to show.

The information can be kept in a three-ring binder and divided into the following tabbed sections using clear cover sheets to hold the paper:

A map of the community – Clear, attractive property maps should show apartment numbers and the locations of amenities. If you don't already have a map of your property or would like to improve your map, contact your Supervisor for assistance.

Enlarged floorplans – These can be found on your Community Website. Consider having multiples of each floorplan so they can be filled out and given to prospects.

Community information – Typically created onsite covering things like amenities, area attractions and conveniences, etc. Be creative and include relevant information.

Brochures – Ordered through SERC.

Current availability – Current Availability changes regularly. Check this every morning to be sure it's accurate, and update it throughout the day as apartments are rented or become available.

Application packets – Application Packets can be printed from [Tenant Tech](#) (Form M002). Ask every prospect if they'd like to fill one out!

The Competition Knowledge Notebook

Although not required, the Competition Knowledge Notebook can be used when a prospect says that they “want to look around” or when there is inclement weather. With current information on your competition you can assist the prospect by allowing him/her to review information about other apartment communities in the comfort of your office. Materials should include your competitors site plans, rental rates, floorplans, and any specials they offer.

Providing this kind of customer service can make a real impression on someone looking for a place to live. It might just give your property the edge when they make their final decision.

Whenever possible, refer the prospect to another local Cambridge managed property that fits their needs.

Second hand stores and dollar stores can be great spots to gather attractive decorations at bargain prices.



Model Apartments

Not every property has the luxury of being able to maintain a Model Apartment, but they can be incredible assets to properties that can. While on tour, prospects are likely trying to imagine what their furnishings would look like in the apartment. A model takes away the guess work and demonstrates how comfortable and attractive the apartment could be.

Model furnishing should show off the best features of your apartment and be kept in pristine condition. Schedule touch-up cleanings and carpet shampoos to maintain the 'like new' quality. If something looks stale or worn, contact your property Supervisor about replacements.



Mini-Model (for the rest of us)

If your property doesn't support a permanent Model Apartment, consider creating a Mini-Model. The setup for a Mini-Model should fit into one or two carryable boxes, contain decorations that add homey touches to the counters in the kitchen and bathrooms and help prospects imagine what the apartment would look like once if they move-in. Once the apartment is rented, the Mini-Model can be easily packed up and moved to the next available apartment.



Lots of advertising sites means lots of passwords to keep track of, make sure that you have all the login information for each site safely stored.

Where to Advertise

The goal of advertising is to get an enticing image of your product in front of potential prospects, and, most importantly, to get them to pick up the phone and contact you. There are a variety of advertising options for the apartment industry. Make the most of the options available to you by maintaining a constant presence on the forms that work for your market.

Craigslist – A great free resource to advertise your apartments. You can post almost unlimited ads per day. Make sure to post a “new ad” rather than renew when the option becomes available. If you renew a post the original post date will still be on the post for everyone to see. No one wants an apartment that appears to have been available for a long time.

Zillow - Not just for buying or selling a home! If your property has 50 units or less, you can use Zillow for FREE! Take advantage of this opportunity, it's great on the budget! Zillow is also in partnership with Hotpads, Trulia and realtor.com, and will automatically post to each of those sites on your behalf.

Hot Pads - You can post to Hot Pads for free regardless of your community size.

Zumper Pro - This trendy site is free to post at, you may just need to communicate that you do not want their screening services once you sign up. This site will also post to Facebook, PadMapper, and Walk Score on your behalf!

Apartments.com – Apartments.com can be great if your property has the budget to advertise with a widely known and utilized website. If you are not currently using Apartments.com and you believe your property would benefit from it, contact your supervisor to discuss adding it to your property's advertising roster.

Referrals – There's nothing nicer than having a prospect call or walk through the door and tell you that they're there because a friend or family member recommended your property. Referrals come from diligent and professional management of your property every day. Make it the best place to live for miles around and residents are bound to talk about how great it is to live there. Keep Referral flyers in your office, rec room, and post them to resident doors to let residents know there's a reward for their recommendation.

Curb Appeal – Curb appeal isn't just about keeping current residents happy with their home, or influencing prospects on tours, it can also attract prospective residents. Keep your property looking great and you're bound to attract the attention of passersby, some of whom will be looking to move.

Don't wait until the vacancy numbers rise. Use Referral Flyers year-round to keep occupancy up.



Generating Referrals

Resident referrals are a common and successful form of marketing. Your existing residents represent a great opportunity to market your community to future residents. Happy residents talk to their friends, family and co-workers about their experiences. By encouraging this form of promotion, your diligent efforts in creating a great community can pay dividends in terms of qualified prospects knocking at your door. Effective marketing involves the distribution of referral fee flyers at least once a month and up to once a week.

- Keep Referral Flyers on your desk, in the Recreation Room and Laundry Room bulletin boards where Residents will see them.
- Post Referral Flyers to Resident doors at least once a month and up to once a week.
- Don't wait until the vacancy numbers rise. Use Referral Flyers year-round to keep occupancy up.

Referral Flyers for your property can be found on the [eExchange](#).

1. Click on the link above to visit the eExchange Referral Flyer page.
2. Use the alphabetical properties menu on the left to find your property.
3. Select the appropriate Referral Flyer for your property.
4. Print copies for distribution and/or save the flyer for printing at a later date. Print copies on colorful paper to attract attention.

RESIDENT REFERRAL PROGRAM

REFER A NEW RESIDENT
and receive a referral check for **\$150!**
Call or email the manager's office for details.

\$150
FREE CASH
Offer subject to change. Restrictions apply.

Beautiful Apartment Homes
1234 NW Sunny Street | Portland, OR 97123
503.123.4567 | beautiful@creaspts.com

CAMBRIDGE
real estate services

\$150 is the set standard for referral fees, but if you really need to amp up your marketing to fill vacancies contact your supervisor about distributing the \$300 version.

Referral fees work well with area realtors, small business operators (who employ people who may live in your community) and, even the site staff can earn referral fees at competing rental communities.



Try taking photos at different times during the week and see what works best for your particular units.

Tips for Taking Great Apartment Photos

1. It's all about the windows and doors

Okay it's really all about the light, but that's where it's coming from. Use the blinds and the doors to help control the amount of light coming into the room. Try out different amounts of light and see what works best. Generally, you'll want as much light as possible, but sometimes the sun can be too direct.

The color of light also changes during the day. It has a warmer look at sunrise and sunset. During midday, it has a cooler or neutral color. Try taking photos at different times and see what works best for your units.



2. Try it with the Lights Out

Natural light doesn't generally like competition and it's far superior to artificial light. Try taking photos with the interior lights on and off. You never know what might work the best.

3. Composition is (Nearly) Everything

Because indoor photography consists of so many architectural lines, keeping good composition is of the utmost importance. Really pay attention to how you frame images, especially in places that have exposed brick or tile work.



Uncertain about your composition prowess? Try taking a lot of photos that are just slightly different from the last. You're bound to find one in the bunch that hit the right mark.

4. Stand in the Closet

It's difficult to take photos that don't make your rooms look smaller than they are. Get into corners, closets, showers, tubs, out doorways, or set your camera on a countertop to get as much into your photograph as possible and to keep those rooms from shrinking under the lens.

Show your coworkers the photos you've taken. A second opinion never hurts.



5. Don't be Afraid of the Grout

Most of your photographs are likely going to be of the rooms in the apartment so your prospect can get an idea of the layout, but occasional photos of great details can make a difference too. They're best used to capture things like quality tile work, unique fixtures, or things that are unique to your property. Try experimenting. If it doesn't work the pixels can always be deleted.

6. Squats and Ladders

Try varying your elevation. Rooms tend to look bigger when photos are taken from an unusual vantage point. They also attract the eye of the viewer as they're not used to seeing a room from ceiling height or from a few inches off the floor.



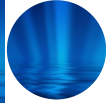
7. Get a Second Opinion

Grab your coworkers and show them a collection of your best shots—see what they're attracted to. If something isn't working, try again. With a little practice and experimentation you're bound to get an eye for how to take great photos on your property. Supervisors can be a great resource for new ideas to freshen up your property's photo library.



Make calendar reminders for yourself to take outdoor photos in the Spring and the Fall when our properties are at their most colorful. Include a mix of indoor and outdoor photos in your ads.

Has your property recently had a major capital improvement or completed newly remodeled interior? Contact your Supervisor about hiring a professional photographer to get the most out of your recent expenditures.



Change the lighting and elevation when taking photos. You might be surprised by the results. Morning and evening can be some of the best times to take photos.

Craigslist Advertising

Craigslist is the primary site for posting free ads. Your property should post on Craigslist at least once a day to keep your ads circulating near the top of the pile.

Placing an Advertisement on Craigslist

To place an advertisement on www.craigslist.com, follow these simple steps.

1. Log on to Craigslist
2. Craigslist should automatically take you to your region's page. Check the top of the page to be sure you're in the right location.
3. Select "post to classifieds"
4. Select the location that fits best.
5. Select "housing offered"
6. Select "apts/housing for rent"
6. If applicable, respond to the craigslist prompts by narrowing your focus for the advertisement.
7. Complete the pre-determined fields to create your custom advertisement
8. Continue to follow the prompts to post your advertisement

The screenshot shows the Craigslist homepage for the Portland, OR region. The location 'portland, OR' is circled in red. The 'post to classifieds' button is also circled in red. The 'housing' section is highlighted, showing 'apts / housing' as a selected option. The 'jobs' section is also visible.

M	T	W	T	F	S	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

Respond promptly to every inquiry. Answering the call the first time is best.



Guidelines for Posting Ads

When publishing an online ad you'll want to follow these guidelines to create the most attractive and useful ad for marketing your community.

1. Understand the Goal of the Ad

- Aim to generate the initial phone call; your leasing skills will ultimately rent the apartment.
- Post Ads at times when your target audience is most likely to be looking – morning, the lunch hour, evening and the weekend.
- Always strive to be on the first page that shows up in a prospect's search.

2. Response Time is Absolutely Critical

- Respond promptly to every inquiry. Answering the call the first time is best.
- Same day response to voicemail is critical; same hour response is better.

3. Price Available Apartments Effectively

- Is there a promotion? Are you pre-leasing? Are you offering a onetime special?
- Set an expiration date in your Ad for specials to help create urgency.
- Check competitor pricing and make sure rents are set at a competitive rate.

4. Distinguish Your Ad From Others

- Use floor plans with square footage & dimensions
- Be creative and focus on the best attributes at your property.

5. Include Professional Quality Photos

- Use a digital camera to photograph the interior of your apartments, the property exterior, and amenities. Keep photo files labeled by unit type and number in an easily accessible location on your computer.
- Have a selection of quality photos available for each floor plan in case the unit your advertising for is still occupied or still being turned.
- Ask your Supervisor if it's time to update stock photos of your property with a professional photographer. It's wise to schedule a photographer when you'll have excellent examples of vacant floorplans available, and good weather for outdoor photos as well.

6. Use Language That Your Target Audience Will Understand

- Avoid industry jargon like "RUB" and "Concession". Use language familiar to your audience like "Utility Fee" and "\$500 off First Month's Rent".
- Photos tell a thousand words; the more you use the better.
- Use short vivid descriptions and avoid long narratives. Online prospects won't read them.



<https://www.hud.gov/library/bookshelf11/hudgraphics/fheologo> has Equal Housing Opportunity Logos of various sizes you can save and use in your

7. Review Your Ad Before Final Posting

- Include your first name, contact #, and property email address.
- Include the [Equal Housing Opportunity Logo](#) *in every ad*
- Make sure the information is accurate and check for spelling and grammatical errors.
- **Affordable housing communities** are required to include the **International Symbol of Access** as well.



8. Make Posting Easy

- Create accounts to make posting fast. Daily postings should take only minutes.
- Resize your photos to shorten loading times.

9. Run Multiple Ads

- Create at least 3 Ad variations for each available floor plan and rotate regularly.

10. Measure, Adjust, Repeat

- Track your ads to identify which posting times, pictures, taglines, and specials are the most effective.

Curb Appeal

Curb appeal is an industry term referring to your property's overall appearance and the impression it makes to the public. Curb appeal is what residents and prospective residents see when they drive onto your property at any given moment on any given day. It's the overall impression of the quality and cleanliness of your property and, by extension, its management.

First impressions are powerful and, once set, difficult to change. How your property looks when first encountered by a prospect, and how it looks on a regular basis to your current residents has an enormous impact on how they feel and what they think about the property.

Not everyone can afford to stay at the Ritz and not every property can afford to look like the Ritz. But curb appeal is cheap. Even if your property doesn't top the eyepopping charts, having a clean well-maintained property is going to make a difference to those who can afford to live there.

Curb appeal directly contributes to leasing success and resident satisfaction, which translates into lower turnover, higher rental rates, and higher occupancy.

Use this [Curb Appeal Worksheet](#) from the eExchange to evaluate your property's condition. The entire property staff is responsible for clean grounds. Site office staff should patrol the grounds on a regular basis. It is a great opportunity to stay up-to-date with the condition of your property.

Communicate your expectations to your staff and train them to evaluate curb appeal every time they're on the grounds.



Why is Curb Appeal Important?

- It Improves rental results
- Helps your property stand apart from the competition
- Creates higher occupancy rates, and higher rents
- Lowers turnover/higher resident retention and satisfaction
- Happy residents
- Attracts a healthy resident profile
- Projects a professional image

When to Review Your Properties Curb Appeal

For properties that are 100+ units, the number of hours that should be spent surveying your property is 1 hour per day per office staff member. As an example, a large site with a Manager and full-time Assistant Manager would be walked 2 hours per day. The 2 hours could be spent by the Manager only, or it could be split.

A community of less than 100 units which are “Manager only” properties should be walked between 30-45 minutes per day.

- Establish a daily routine for regular upkeep.
- Develop a curb appeal checklist.
- Communicate your expectations to your staff and train them to evaluate curb appeal every time they're on the grounds.
- Take a trash picker and bucket with you—seeing site staff picking up trash makes a great impression on residents.
- Strive for consistency and above all, have pride in your property.

Important Areas of Focus

- | | | | |
|-----------------|---------------------|--------------------|----------------------|
| ✓ Landscaping | ✓ Pools | ✓ Patios/Decks | ✓ Parking Lots |
| ✓ Laundry rooms | ✓ Exterior Lighting | ✓ Windows | ✓ Gutters |
| ✓ Signage | ✓ Trash Areas | ✓ Hallways/Entries | ✓ Common Areas/Paint |

Focus on these primary areas to guarantee good curb appeal:

It's always a good time to be inspecting the condition of your property and the quality of its curb appeal. Keep an eye on things as you travel to and from the property, post notices, check your tour routes at the beginning of each day, as well as setting aside time to thoroughly inspect the condition of your property.



If you find landscaping issues on your property, contact your landscaper and discuss solutions to the problem.

Landscaping

A prospective resident will inspect the condition of your property from the street to your front door. Clean and well-maintained landscaping is an “attention-getter” and adds life to your community. Check that:

- Lawns are green, consistently mowed and edged, and free of weeds.
- Shrub beds have been raked regularly and are free of weeds and debris.
- Bark dust coverage is adequate, particularly in “marketing corridors”.
- Flowers are well maintained and appropriately placed with consistent colors.
- Trees and shrubs are properly pruned
- Seasonal flowers are at key focal points, such as the property entry, around signage and the office.
- Irrigation covers properly, and that there’s good drainage and the landscaping is free from brown spots and erosion damage.
- Mature landscape doesn’t look “overgrown”.
- Hoses have been wound up, hung or stored out of sight.

Laundry Rooms

Place yourself in your resident’s shoes—would you want to do laundry in a poorly-maintained laundry room? It should always be sparkling clean, well lit, and appropriately ventilated so that it doesn’t get too hot or stuffy. Check that:

- Laundry machines, counter tops and floors are wiped down daily, free of lint and other debris.
- Bulletin boards provide general information or announcements and are neat, organized and colorful. Remove outdated materials.
- Property trash receptacles are in good condition, cleaned and emptied frequently.
- Floors are swept and mopped.
- The paint on the walls and ceiling is clean and attractive.
- Residents haven’t left piles of unsightly clothes.
- Lights, locks, extinguishers and heaters are in working order.
- Ventilation is working properly.

If you find an issue with one or more of your signs, contact your supervisor about replacement.



Signs

Examine your community's signage closely. Appealing signage is part of the "curb appeal" package. All signs should be legible, free from peeling paint, clean, and unobscured by tree limbs or other plants. Avoid using "homemade" signs or post-it notes. Keep it professional.



Check that:

- The monument sign is prominent and attractive.
- Signage is professionally designed and installed.
- The standard Cambridge Office sign is in good repair and has accurate information.
- Signage is clean and up to date.
- Seasonal flowers are adding a splash of color.
- Signage is consistent in color and appearance. Appropriately placed; quality and quantity.

- Directional signs point to the office or leasing area.
- Your A-board sign conforms to current specifications.
- Building and Apartment numbers are clean and in good repair
- Flags and banners are in good shape.

Pools

Your community's pool can be a big draw for residents and prospects—let this amenity do the talking. Check that:

- The water is clean and clear
- The pool furniture is clean, appropriately placed, and in good working order.
- The surrounding grounds are clean and free from litter
- Equipment, such as the "Kreepy Krawl-ie" is in good working order.
- Life preservers, brooms, hooks and deck furniture are all organized and properly located.
- Pool signage is installed properly and is clearly visible.





If your property's lights aren't adequate for safety reasons, contact your Supervisor or Supervisor for advice on how to upgrade your property's exterior lighting.

Exterior Lighting

Your community's lighting is an integral part of overall curb appeal. It's also important for Safety reasons. Make sure your community's exterior lighting is adequate and in good working order. This will require nighttime property inspections. Schedule these regularly. During summer months light inspections can be completed at the same time as nighttime pool closures. Check that:

- Exterior light globes are clean and free of cobwebs and dust.
- Missing or burned-out light bulbs have been replaced as needed.
- The globes, fixtures and light bulbs on your property all match.
- Bulbs are clear (rather than frosted) and are in clear fixtures.



Trash Areas

Trash on the property is a *huge* turn off. It is everyone's job is to make several passes through heavily trafficked areas each day to make sure any discarded trash is removed promptly. Check that:

- Garbage enclosures and gates are in good condition.
- Trash areas are clean, free of litter and debris.
- Recycling areas are updated, enclosed, properly marked and maintained.
- Dumpsters are enclosed by an appropriate fence or other enclosure.
- Pressure wash as needed.
- No furniture (couches, chairs, mattresses, box springs), boxes, tires or batteries are outside dumpsters or enclosures.
- Unauthorized dumping is being addressed.

Patios/Decks/Windows

If you're having difficulty leasing an apartment in a particular building, unsightly patios, decks, or windows may be working against your leasing efforts. Check that:

- Only approved items are on patios, decks and in windows.
- The building is free from dry rot, and touch-up painting needs have been addressed.
- Resident patios or decks are uncluttered and void of unauthorized furniture, toys, trash.
- Windows are free of blankets, foil, black-out devices, signs or stickers.
- Windows are clean—a must in vacant apartments and office areas.
- Air conditioners have been installed per Cambridge policy.

Sidewalk trip hazards need to be removed on a regular basis. Contact your Supervisor to find a vendor near you.



Hallways/Walkways/Entries

The best way to prevent eyesores and lease violations is to empower all team members with the responsibility to report issues in your community's common areas and to address them appropriately. Check that:

- The common hallway carpet has been vacuumed, and touch-up paint completed regularly.
- Walking paths to vacant apartments, model and office are clean and neat.
- Entryways to buildings are clean and free of bikes, toys, etc.
- Sidewalks and unit entries have been pressure washed as needed (1-2 times per year).
- Trip hazards are appropriately addressed

Parking Lots

The community's parking lots are a major part of curb appeal. Clean and well-maintained parking areas provide a positive appeal to prospective residents, and your current ones. Check that:

- The lot is properly lit for safety.
- There aren't any inoperable cars, expired tags or flat tires.
- No residents are working on car repairs.
- Parking lot drains are clean and operating appropriately.
- Lots are blown or swept regularly (2-3 times per week).
- Oil spots have been removed (2-3 times per year).
- Striping and curb paint is renewed as needed.
- Seal coating or crack filling when needed.
- No pot holes.

Exterior Paint

How do your buildings look? Are they dingy or dirty? Do they look "fresh"? Check for:

- Areas that need touch up (e.g. rails, garage doors, apt. doors, door frames).
- Siding and garages that need pressure washing.
- Algae/moss that needs to be removed by light cleaning with Clorox and water mix.





Recreation rooms can sometimes acquire a not-so-fresh smell. Room fresheners can make a difference. Contact your Supervisor for recommendations on local vendors.

Recreation Rooms and Playgrounds

How does it feel to walk into your recreation room? Is it clean and inviting? Is the playground area free of trash; is the equipment in good repair? Check that:

- Equipment has been maintained regularly for safety.
- The area is free of trash.
- Proper signage is posted where needed.
- Proper soft material has been installed beneath play equipment.
- Touch-up paint as needed.

Gutters

Believe it or not, a simple gutter on a building can really affect a building's appearance. Taking a close look at gutters while inspecting the overall condition of a building is important. Check that:

- Gutters are clean to avoid overflow and overflow splash.
- Bent or damaged gutters, downspouts or carports have been replaced.
- Downspout connections are well-maintained

Resident Retention

At least once a year your residents are going to have the option to move. Providing the kind of quality year-round service and maintenance that keeps residents in their homes might seem like a daunting task, but it's more about delivering that service each and every day. Do your best today and then again tomorrow, and you're sure to string together a years worth of exceptional service.

Turnover is a normal and healthy part of managing a property. Not having any turnover could be a sign that your rents aren't competitive, but that doesn't mean that working at keeping the residents you have isn't a good idea. Turnovers are expensive especially when you add in the lost rent due to vacancy, time spent marketing, advertising, and touring not to mention the hard costs of the turnover itself.

Resident retention is best accomplished by providing excellent customer service, maintaining curb appeal, and creating a desirable community. Not only will this help retain residents that might otherwise start shopping competitors, but it might also make that next rent increase easier to accept and generate referrals when they tell their friends and family about how great it is to live at your property.

Take advantage of opportunities throughout the year to help develop of sense of community at your property and offer difference making incentives.

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Seasonal Activities

Not every resident will participate in Property organized activities, but for those that do it can create relationships and a sense of community that residents won't want to leave.

The following is a list of the annual Cambridge property activities. Some communities have site specific traditions. Want to start one of your own? Contact your Supervisor with your idea.

National Night Out - National Night Out is a dedicated day for communities to host events that encourage and focus on crime and drug prevention. Each event should be designed to heighten community awareness and strengthen neighborhood spirit as well as police-community partnerships. See the [National Night Out website](#) for more information. You can also visit this [City of Portland website](#) for brochures regarding crime prevention to hand out at your event.

Spring Community Clean-up – Loved by most residents, the annual Spring Community Clean-up is a property hosted opportunity for residents to do some serious Spring Cleaning. Dumpsters are delivered to the community for use by residents, usually in April. Watch for emails from the Central Office and start planning your community's annual Spring Clean-up.

Renewal Incentives

If there's anything that will get a resident thinking about moving it's receiving a rent increase. Offering incentives with a lease renewal offer, often in the form of inexpensive upgrades to their home, can sometimes tip the balance if a resident is considering moving out.

Common incentives include:

- Free Carpet clean
- Blinds replacement
- Sink replacement
- Interior door hardware replacement

Before offering a specific incentive to a resident (other than a carpet cleaning), an inspection should be scheduled to assess potential upgrades in their apartment. Only out of date or worn items that would be replaced during an apartment turn should be replaced. Use the current Cambridge approved model of the same item. See the [CRES Spec Sheet](#) for a list of currently approved products. Carpet cleaning can be offered at any time as it helps prolong the life of a carpet.



Offering incentives with a lease renewal in the form of inexpensive upgrades can sometimes tip the balance if a resident is considering moving out.

Preventative Maintenance Incentives

Preventative Maintenance Inspections are the perfect time to offer small upgrades. During the PMI, Maintenance staff can identify potential upgrades in the resident's apartment and notify the manager. Residents will love the mid-lease offer and have months to live in their updated apartment before their lease renewal comes due. Click here to see more about [Preventative Maintenance Inspections](#).

Leasing

Phone Etiquette—Voicemail Greeting

Outgoing messages on your answering machine can be a valuable tool for communicating with a variety of people—vendors, prospective residents, current residents, central office employees, etc. Here are a few tips and tricks to help make sure your outgoing message is effective.

- Make sure your outgoing greeting is clear and easy to understand.
 - Volume** – Speak loudly enough for the recorder.
 - Speed** – Speak slower than you might normally speak.
 - Review** – Make sure to review the message after you've recorded it.
- Always remember that the office telephone is a business telephone line, and that the information provided should be restricted to professional, appropriate business information. Avoid things like 'theme songs', political statements or 'the joke of the day' when recording your outgoing message.
- When recording a message, remember residents also contact the management office for various reasons. If your phone message mentions your blow-out free rent specials being offered from now until eternity, a current resident may take issue. It's best to stay a bit 'general' until the actual phone call with a prospective resident.
- Be sensitive about the length of the message. Messages which extend for more than 15 to 30 seconds can lose their effectiveness as callers will grow impatient.
- Always record your outgoing message in a cheerful, upbeat tone.
- We all have difficult days. If your message was recorded on one of those days, now is a great opportunity to re-record your message in an upbeat voice.

Note: Cambridge endorses the use of afterhours emergency Management and Maintenance phones and pagers. For this reason, it is mandatory that afterhours emergency numbers be provided on your outgoing phone recorder message. And, because resident service is a critical element to the successful management of a property, we strongly consider those of you who have only moderate marketing needs to consider offering the emergency numbers prior to offering information regarding vacant apartments available.

Always record your outgoing message in a cheerful, upbeat tone.



Always include:

- ✓ The Property Name
- ✓ The Afterhours Emergency Number(s)
- ✓ Office Hours
- ✓ Apartment Types

Two sample voicemail greetings:

“You have reached the _____ Apartments. If you are a current resident and you are experiencing a life threatening emergency, please hang up and dial 911. For other afterhours maintenance emergencies please call our 24-hour response number at _____. For after-hours management emergencies please call _____. If you are calling to learn more about our wonderful _____ bedroom apartment homes, please leave us your name and telephone number so we can call you back promptly. Our office is open weekdays from ____ until ____ and on weekends from ____ to _____. We look forward to speaking with you and thank you again for calling _____ Apartments.

“Thank you for calling the _____ Apartments. If you are a current resident and you are experiencing a life threatening emergency, please hang up and dial 911. If you are experiencing a maintenance emergency, please call us at _____. For afterhours management, you can call us at _____. For information regarding our beautiful _____ bedroom apartments, leave your name and telephone number after the tone. We will return your call during our regular business hours which are Monday through Friday, ____ until ____; Saturday and Sunday, ____ until _____. Thank you again for calling.”

**Answer the telephone with a smile on your face.
Give a confident introduction; be creative.**



Prospective Resident Telephone Calls

A call from a prospective resident is an *opportunity*. It's not an accident that the prospect called your property. They've already seen or heard of your property elsewhere and have an interest in living at your community. Make the most of that opportunity. Take their information, give them the information they request, and attempt to convert that interest into a tour at your property.

Answer the telephone with a smile on your face. Give a confident introduction; be creative. Gently drive the direction of the conversation, always with the goal of getting the prospective resident to the next step—a tour. Build value at every opportunity.

During a call, the following is necessary to qualify the prospect:

- Prospect's name—Whenever convenient during the conversation, use their name. Obtain the names of household members.
- Size of apartment needed
- Keep leasing information near the phone so you can answer your caller's questions
- Make directions available to your caller
- Their desired move-in date
- Number of people that will be living in the apartment
- Type of pet(s), if any
- How they heard about your community
- Don't offer the price first. Ask the prospect what price range they are looking for.
- Ask why they are moving. What are the 3 things that are most important to you in your new home?
- Take control of the conversation
- Remember to build value
- Don't put a person on hold if you can avoid it.

Use the information on the Guest Inquiry Card to sell the prospect an apartment that meets their needs. Set an appointment that is most convenient for the prospect, preferably for the same day.



For your safety, acquire photo ID from *all* persons of legal age prior to showing an apartment. Be consistent in this practice.

Prospective Resident Tours

Before the day begins, inspect your “marketing corridor”, or tour route.

This should include the path to and from all vacant apartments ready to show as well as the amenities on your property. Make sure the route is clean and attractive. Vacant apartments must *not* be shown unless they are rent ready. For safety reasons, no apartment should be shown after dusk.

When your prospect arrives at your office, stand up and greet them. If you’re with a resident or another prospect when they arrive, acknowledge them warmly and let them know you’ll be with them soon. If possible, greet them at the door. Introduce yourself with a smile. Ask if the prospect has an appointment, reference their Guest Inquiry Card, if they have one. If not, complete the Guest Inquiry Card with them then.

Employee’s showing apartments are encouraged to obtain government issued photo IDs (local, state, or federal) from all persons of legal age (18 and older) in each tour group before they tour the apartment and community.

The ID(s) should remain in the office during the tour and will be returned to the prospect(s) upon returning to the office. Minors must not be shown an apartment unless accompanied by a person of legal age.

Always know the available apartments to show and lease.

When walking to the apartment, walk next to the prospect, if possible. Chat along the way and keep your prospect involved in conversation. Questions about your prospect help to keep the conversation flowing.

While in the apartment, guide the prospect; ask the prospect to open cabinets or admire the view. Sell “feelings”, not things. Point out the many features in the apartment. If the prospect points out one of the positive features, agree enthusiastically. Let them know how popular that aspect of the apartment is with residents and other prospects. Help them to feel good about the idea of living at your property.

Take advantage of the walk back to the office. Use this time to “close” the prospect. You can be subtle, by asking “yes” questions, involving the prospect with the tour, and getting them in the habit of agreeing with you. Once your back at the office, review the availability with them, ask them to choose a home and establish a convenient move-in date. Finally, ask them to fill out an application. Provide the application and criteria and offer them something to drink and make them comfortable.

Follow-up with prospects demonstrates a commitment to professional management, and exceptional customer service.



In Review:

- Inspect your marketing corridor at the beginning of every day.
- Greet prospects warmly and with a smile
- Obtain government issued photo ID from all adults prior to showing an apartment
- Know Your Availability
- Keep the prospect talking – elicit positive comments about the property and apartment
- Use the walk back and time in the office to “close” the prospect. Ask for that application.

Follow up with your Guests

Follow up is a vital part of the leasing process, and can be extremely beneficial. An average of 25% of prospects will lease an apartment due to follow-up calls. Follow-up also demonstrates a commitment to professional management, and exceptional customer service.

Here are some great tips to help you establish good follow-up procedures:

On the same day a prospect comes to visit, mail a “thank you” note or post-card, placing a business card with the note. You can also send an email or leave a voice message for them. There are a variety of thank you cards available online at [Office Depot](#).

Within 24 hours of visiting with the prospect, you can place a telephone call or email them. Remind them of their visit by remarking on some positive aspect of their tour. See if they’ve made a decision and invite them for a return visit.

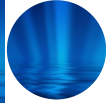
If your prospect agrees to a second visit, contact them again within 72 hours, whether by a phone call, note or email. Remind them that you would love to have them live at your community. Even if they decide not to select your community, they’re likely to recommend you to a friend due to the excellent service, professionalism and commitment.

The Application Process

The Application Packet

Application packets should always be on hand to give to prospects. Assemble them ahead of time so they’re available when a prospect arrives. They typically contain:

- Manager, Assistant Manager or Leasing Agent Business Card
- Rental Application
- Criteria for Residency
- May include brochure, flyer, floor plans, and site map



Application packets should always be on hand to give to prospects. Assemble them ahead of time so they're available when a prospect arrives.

Receiving an Application

- All applicants over the age of 18 that intend to live in the apartment must be screened.
- Applications should be processed in the order they're received, rather than in the order in which they were distributed to avoid being 'held hostage' by an applicant slow to return their application.
- All intended applications for a particular apartment must be received prior to submitting them for screening.
- If a prospect wants to put an application on an apartment you've already received an application for, be sure to explain that the previous applicants will have first choice if they are approved.

Screening fees must be collected before the application is processed. Not everyone will pass the screening process and it is very difficult to collect screening fees if we are unable to rent to the applicant. Furthermore, our policy is to require a complete application in order to initiate screening. A paid screening fee is part of a complete application.

Key Steps for Accepting and Submitting an Application:

- Each adult member of a household, regardless of marital status, must complete a separate application and pay a separate screening fee.
- Confirm the applicant has read and understands the criteria for residency.
- Have each applicant submit a legible, complete, and accurate application; make sure it is signed.
- Carefully review the application for completeness and accuracy and collect the screening fee.
- Verify the applicant's photo identification.
- Provide the applicant with a copy of the signed application.
- If the household contains more than one applicant, submit *all* applications to the screening company at one time. Not doing so may lead to complications with the screening process.

Each adult member of a household, regardless of marital status, must complete a separate application and pay a separate screening fee.



Eligibility for Renting

Eligibility to rent is specific to the individual and their circumstance. This includes first-time renters, minors, dependent adults enrolled in school, and dependent adults under the care of the primary applicant, and all others who may influence the application process. Listed below are guidelines that need to be followed to ensure that the proper procedure is followed:

- First-time renters may require a co-signer (see the Guarantee (Co-signer) Agreement in [Tenant Tech](#) form M026).
- Dependent adults (disabled, elderly) under the care of the primary applicant are required to sign the rental agreement, unless a waiver is granted by the Property Supervisor.
- Dependent adults (college students) may be required to sign the Rental Agreement.
- Live-in caregivers are not required to sign the Rental Agreement, but the live-in and the resident are required to sign the Live-In Care Attendant Affidavit (Form C338 on [Tenant Tech](#)).
- Minors that are: parents, married, emancipated, or pregnant are required to sign the rental agreement.

The Screening Process

The screening company processes the application and makes a recommendation based on the results. All information obtained by the screening company is confidential and may *not* be discussed with the resident.

Screening Results cannot be overturned or altered by the Site Manager or staff. Applicants have the option to challenge the results by providing a written appeal to the Central Office. More information about the appeal process can be found in the screening criteria.

Co-signers

First-time renters may require a co-signer. A co-signer needs to fill out an application (Form M088 on [Tenant Tech](#)) and pay the application fee. Write in the co-signer's name in the co-signer field on the applicant's application so the screening company is aware that the second application is for a co-signer. It is recommended that the co-signer's application be submitted at the same time as the applicant's application.

Once approved the co-signer would need to sign the the Guarantee (Co-signer) Agreement (form M026 on [Tenant Tech](#)) agreeing to guarantee the performance of the resident under all obligations of the Rental Agreement.



Never leave a message on an answering machine or with another person containing the details of the status of an application.

Recommendations

There are several recommendations that can be made based on the criteria for residency. Based on his or her qualifications, an applicant may be

- ✓ **Approved** and required to pay a security deposit equal to one-half of one month's rent
- ✓ **Full Security** and required to pay a security deposit equal to a full month's rent
- ✓ **Double Security** and required to pay a security deposit equal to two months' rent
- ✓ Applicants may also be **Denied**.

Screening Notification

Direct communication with the applicant is *required* before disclosing the outcome of the screening. Never leave a message on an answering machine or with another person containing the details of the status of an application. When it's necessary to leave a message, leave only your name, telephone number, and a request for the applicant to return your call.

Never give out the recommendation client report to the applicant.

Approval

Following notification of an approval, the applicant has 72-hours to place the required deposit of one-half to two month's rent to secure the apartment and do one of the following:

Sign an Agreement to Execute a Rental Agreement/Deposit to Secure Occupancy (Form M003 on [Tenant Tech](#)) and pay the required deposit. This will hold the apartment until the Incoming Resident's move-in date at which time they will be required to complete the entire Lease Packet including signing the lease in order to take possession of the apartment. **The Execution/Security Deposit must be paid using Certified Funds, meaning with a Cashier's Check or Money Order. Personal Checks will not be accepted.**

-or-

Sign an Agreement to Execute Rental Agreement and Complete the entire Lease Packet including signing the Rental Agreement and pay the required deposit. This holds the apartment until the Incoming Resident's Move-in date. **The Security Deposit and First Month's Rent must be paid separately and by Certified Funds, meaning with a Cashier's Check or Money Order. Personal Checks will not be accepted.**

Never tell an applicant that he or she has been denied. Instead, tell the applicant that his or her *application* has been denied.



Upon receipt of the deposit payment, provide the applicant with a Security Deposit Receipt (form C464 on [Tenant Tech](#)).

If the applicant fails to either sign the Agreement to Execute Rental Agreement and pay the required security deposit or complete the Lease Packet including signing the Rental Agreement and pay the required security deposit within the 72-hour period, the apartment must be returned to the market. The applicant still has the option of signing the Agreement to Execute Rental Agreement or Completing the lease packet and paying the Security Deposit unless another applicant applies for the same apartment.

The security deposit recommended by the screening company is the required deposit. Never charge more or less than required by the screening company.

Note: If the Applicant should only sign an Agreement to Execute a Rental Agreement (Form M003 on [Tenant Tech](#)), provide them with a sample copy of Lease Packet to review prior to their move-in.

Agreement to Execute/The Deposit to Secure Occupancy

(Form M003 on [Tenant Tech](#))

The Agreement to Execute Rental Agreement /Deposit to Secure Occupancy should be used anytime a resident pays a security deposit. It is a legal document that allows Cambridge to retain the Deposit if the resident fails to pay the balance of monies due at move-in and/or fails to execute the Rental Agreement.

Initial Lease Term

In all states *except Washington*, If the move-in date does not fall on the last day of a month, the initial lease should be for 12-months plus the first month's prorated period. Equally, all move-in leases should cover a period no shorter than 365 days. For example, a resident that moves in on January 15th, 2023 will have a lease end on January 31st, 2024. All leases end on the last day of the month.

Leases should never be 13 months or longer.

If move-in occurs on the last day of the month, the lease should end on the same date the following year.

New residents may also sign a lease shorter than 12 months, but they would not be eligible for a rent increase until they have resided at the property a full year, or 365 days from the date of their move-in. For that reason, it is preferred that residents initial lease term be 12+ months at move-in, as described above.

If a new resident prefers shorter period, a six-month lease should be offered. Care should be given when renewing initial leases that were six months in length so that the second lease ends after the resident has resided at the property a minimum of 365 days so that a renewal increase may be offered at its conclusion.

After a resident has resided in their unit for a period of 365 days or longer, leases can vary in length, but should always concluded on the last day of the month.



Should an applicant wish to contact the CRES Fair Housing Officer, do not volunteer your services in assisting the applicant with the dispute.

In Washington only, all leases should be for less than 12 months and are never to exceed 365 days. For example, if a resident were to move-in on January 15th, 2023 their lease would end on December 31st, 2023.

Denial

Responding to a denial must be done with care and sensitivity.

- An applicant is denied due to a failure to meet the Criteria for Residency. CRES employees must *never* override this decision. Overriding an application may be grounds for termination of employment.
- Never tell an applicant that he or she has been denied. Instead, tell the applicant that his or her *application* has been denied.

All Denied and Canceled applications *must* be processed through Yardi. See Page 55 of the [Yardi Voyager Residential Procedures Guide](#) for instructions.

Background Investigations will mail out a letter of denial to the applicant.

If the applicant questions the denial, direct him or her to the P.O. Box address of the screening company, located on the second page of the Criteria for Residency. Instruct the applicant to reference the information on how to contest a **decision**.

Background Investigations
7668 SW Mohawk St,
Tualatin, OR 97062

Should an applicant wish to contact the CRES Fair Housing Officer, do not volunteer your services in assisting the applicant with the dispute. Do not contact your Supervisor to negotiate the decision. The burden to appeal must rest with the applicant in order for CRES to remain unbiased.

Equal Housing Opportunity Manager
Cambridge Real Estate Services
P.O. Box 2968, Portland, OR 97208

Or

Email to info@cambridgeres.com

It is important that all move-in paperwork is read and signed by the resident prior to taking physical possession of their new apartment.



Resident Orientation

The Move-in Orientation is the final step before a new resident takes possession of an apartment, and their first official introduction to the property. It is also probably the most important conversation you're going to have with the resident. Specific guidelines should be followed to ensure that this process is executed properly and your new resident's move-in goes smoothly.

Prior to the Resident Orientation, print all the Move-in Mandatory forms, and the Move-in Optional forms appropriate to your property, from [Tenant Tech](#).

Double check that the name(s), apartment number, rent, security deposit, RUB, and all other fields have been filled in correctly. The Lease is a legal document. Errors can have serious consequences if there were ever cause for litigation. Highlight the signature and initial areas on all move-in paperwork for visibility. The Manager is the Designated Agent to sign the Rental Agreement.

Before the resident takes possession of their new apartment, thoroughly inspect the apartment. If the apartment has not been cleaned recently, schedule a cleaning "touchup" the day before move-in so their apartment is fresh. Call the new resident at least two days prior to the move-in to confirm the date and time. Test all keys to ensure they work properly, and, if they have a garage, test it as well.

It is extremely important the Utility Setup/Termination form (Form M048 on [Tenant Tech](#)) is returned to the office prior to the move-in. When a resident sets up their utilities (especially electric/gas), they are required to provide their account number. If the resident does not set up the utilities in their name, the property can continue to be invoiced for electric/gas usage. The Utility Setup/Termination form can be mailed or emailed to the resident prior to their move-in date to give them ample time to contact necessary utility companies. Let them know that if the form is not completed and returned by their move-in date the resident may not obtain keys.

The Security Deposit payment and First Month's Rent must be paid using Certified Funds, meaning either Cashier's Checks or Money Orders. First Month's rent must also be paid separately from the Security Deposit Payment.

The Orientation could take place on the actual day of move-in, or prior to the scheduled move-in date. Here are a few tips for conducting a Resident Orientation:

- Schedule an appointment. Allow *at least* 30 minutes.
- Review all documents with every adult resident.
- Focus on the lease buyout clause. (if applicable)
- Focus on the Wear and Tear provision.

Place heavy focus on three expectations:

- Paying amounts due and honoring the agreement.
- Being respectful towards others.
- Avoiding damages to the premises.
- Explain how payments can be delivered to the office—mail, drop box, and hand delivery—and the late fee policy.



Review the move-in process with staff and to ensure that every resident is receiving the same quality move-in experience.

Afterhours Move-in

On rare occasions a resident will request to move-in after regular business hours. If a resident is arriving to move-in after regular business hours we suggest:

- All paperwork *must* be signed ahead of time. The deposit and the move-in prorated rent (or first month's rent) must be paid using certified funds and in the site's possession as well as the Utility Setup/Termination Form.
- Notify the resident you will leave the front door of their new apartment unlocked.
- Tell them where you will be hiding their front door key (in the butter dish of the refrigerator, for example).
- Leave the Unit Condition Report on the kitchen counter. Place a note telling the resident to return the report within 3 days of their move-in.
- Call your resident the following day to make sure they arrived.

Or, better yet, call your new resident ahead of time and schedule an appointment for their new move-in. Meeting them at the office at 7 p.m. for their move-in would be great customer service.

The Unit Condition Report

Residents are required to complete the Unit Condition Report ([Tenant Tech](#) Form M007) within 3 days of their move-in. The resident is welcome to conduct the move-in inspection on their own. It is not required for a staff member to accompany the resident on their move-in inspection.

If the resident will be conducting the inspection alone, it is important to note new items on the Unit Condition Report such as new carpet, vinyl, blinds, appliances and any other items that were replaced. This should be done prior to giving the resident the form.

The Unit Condition Report is one of the primary documents recording the condition of the apartment prior to move-in and at move-out and would be used to support and defend move-out charges if the resident disputed them.

Notify the resident to return the Unit Condition Report within 3 days of their move-in. It is imperative that this form be completed and returned. You may hold their mailbox key until the form is returned. Provide the resident with a copy upon completion.

Move-in Transmittal List

The Move-in Transmittal List (Form C347 on [Tenant Tech](#)) will print as part of the Move-in Mandatory paperwork. This form lists all of the required move-in paperwork that needs to be forwarded to the Central Office.

The Rental Agreement is a legal document. Pay special attention to the details to avoid errors that could have repercussions if there were ever a dispute.



After completing the move-in process with your resident and receiving a signed copy of the Unit Condition report, compile and make copies of the documents listed on the Move-in Transmittal List. You will notice that not all move-in paperwork is on this list. Assemble the transmittal with the Move-in Transmittal List on top and the original copies of the listed paperwork in order as listed. Send the assembled paperwork to the Central Office.

File the copies of the move-in paperwork in the resident file. For more on how to assemble a resident file see Resident File.

Required Transmittal List Paperwork for All Properties

Rental Application (M002) Tax Credit Application (M302)

The rental application will have been completed once you reach the move-in stage with your resident. Check the application to be sure the apartment number is correct, and the rent amount is accurate as agreed upon.

Recommendation from background screening company (Faxed to the Property by the Screening Company)

Do not alter this information and be sure to include it. Verify that the recommended security deposit has been collected, and that the correct security deposit amount has been listed on the rental agreement.

Rental Agreement (CM001-PK)

The rental agreement is a detailed record of financial transactions. Check that the information is accurate prior to the Resident Orientation. The begin date must reflect the actual day the resident obtains keys. Check to make sure the expiration date is accurate.

In all states other than Washington, 12 month leases should equal 12 months *plus* the prorated first month. For example, a resident who moves in on January 15th, 2024 will have a lease which expires on January 31st, 2025.

In Washington, 12 month leases should equal 11 months plus the prorated first month. For example, a resident who moves in on January 15th, 2024 will have a lease which expires on December 31st, 2024.

Check to make sure the deposit amount paid is reflected in the payment portion of the agreement. All deposit monies should be paid by the move-in date.

Before the lease is signed by the new resident(s), it's the Site Manager's responsibility to ensure that all new residents have reviewed the lease and all provisions. Verify with the incoming



You can withhold the resident Mail box key until they return the Unit Condition Report.

resident(s) that their names are correct, and that the financial accounting and that the dates for move-in and lease expiration are as agreed upon. Have the rental application and Agreement to Execute Rental Agreement available if there is a dispute. Review the Lease Buy Out clause and the Wear and Tear Provision with the resident(s). Review important details of the Terms and Conditions and give the resident(s) the opportunity to read the document if they so choose.

Before compiling the paperwork for transmittal and filing it in the resident file, check that all signatures and initials are in place. If there is a missing signature or initial, contact the resident to have them complete the signing process.

Amendment to Rental Agreement (M056)

The purpose of this form is to assist in keeping drugs and other illegal activity off the property.

Lead-Based Paint Disclosure (if applicable) (M032 and M-LEAD)

This document, in compliance with the HUD and EPA federal laws, discloses to all residents moving into apartment communities built prior to 1978 of lead-based paint hazards. All residents who sign this disclosure, must also be provided with a copy of the EPA approved booklet, "Protect Your Family from Lead in Your Home".

Check In & Out Accounting (M107) - California

The purpose of this document is to record the condition of the apartment at the time of move-in. The form must be signed by the Resident and the Managing Agent receiving the form. A copy of this report must be provided to the resident and returned to the Site Office within 3 days of move-in.

Utility Setup-Termination (M048)

This form provides the new resident with their address and a list of all utility companies. The new resident is responsible for setting up required utilities and providing the site management with the corresponding account number(s). This form *must be* returned at the time of move-in.

It's recommended that approved applicants receive this form when they sign the Agreement to Execute Rental Agreement or, if possible, at least a week prior to their scheduled move-in date.

Pet Agreement (if applicable) / No Pet Addendum (M006)

The Pet Agreement must be signed prior to the resident's move-in. A photograph of the pet is suggested, and proof of renter's insurance is *required* before the pet is allowed into the apartment. The Pet Agreement specifically states, "...before move-in of pet, resident shall provide Cambridge Real Estate Services with proof of insurance of a minimum of \$100,000 liability to cover any damage or injury caused by said pet(s). The community should be named as an



Let your new residents know they can be charged \$250 for tampering with a smoke detector. Better to be surprised at move-in than when the bill arrives.



“additional interest” on the policy. Said proof shall be subject to reverification at any time a declaration page is reissued. The resident shall notify Cambridge Real Estate Services of any lapse of insurance.”

If you do not receive the insurance verification prior to move-in, call and remind the resident of the requirement. It is important to receive this information, as they will not be able to move their pet in without having provided it.

If the incoming resident does not have a pet, write “No Pet” on line 2. The Pet Agreement will function as an addendum, notifying the resident that if they were to get a pet in the future that they would be required to notify Site Management, pay the required deposit and pet rent if it is charged at the property.

Mold and Mildew Addendum (M038)

The purpose of this document is to ensure all residents are aware of all mold and mildew hazards, prevention tips and clean-up procedures.

The *Move-In Paperwork Transmittal List* also includes a list of the required paperwork for Tax Credit, Rural Development and HUD Properties.

Smoke/Carbon Monoxide Alarm Test Instructions (M005)

This form gives instructions on how to test their smoke/carbon monoxide alarm, identifies the type of alarm present in their apartment, and notifies them that tampering and removing the smoke detector may result in a \$250 fine.

Rent Collection Policy (C054)

The Rent Collection Policy describes Cambridge Real Estate Service’s policies regarding rent payment due date, grace period, late fees and other policies regarding payment and collection.

Satellite Dish Installation Policy (M033)

This form describes the allowed and prohibited placement for Satellite dishes on the property as well as notifying the resident of the possibility that the location of their apartment may not be suitable for installation of a satellite dish.



Residents should be moved in on Yardi the same day the resident takes possession of the apartment

The following list of forms are included with the Required Transmittal for all Properties.

Required Transmittal List Paperwork for Low Income Housing Tax Credit Properties Only

Tax Credit Lease Addendum (C169)

Notifies the resident of the annual recertification requirement, and that their rent may be altered either upward or downward during the term of the lease through written notification 30 days in advance of the increase.

Tenant Income Certification

Form detailing residents financial qualification for Tax Credit Housing.

Subsidized Rules and Regulations

Explains rules and regulations specific to Tax Credit properties.

Home Addendum (VAWA)

Notifies the resident that the landlord may not consider incidents of domestic violence, dating violence, or stalking as serious or repeated violations of the lease or other “good cause” for termination of assistance tenancy or occupancy rights of the victim of abuse.

LIHTC Lease Rider (C404)

Notifies the resident that their tenancy may not be terminated without “good cause” and that they must receive written notice that is specific enough for them to present a defense at least three days prior to the termination of their tenancy.

for Rural Development Properties Only:

Rural Development Addendum to Lease

Rural Development Tenant Income Certification

Form detailing residents financial qualification for Rural Development Housing.

Subsidized Rules and Regulations

Defines property rules. Residents will receive one written warning for minor violations prior to eviction proceedings. Major violations can lead to immediate eviction proceedings.

The Housing Authority controls Federal funds that are set-aside to assist qualified residents with their monthly rent payments.



for HUD Properties Only:

HUD Certification

Form detailing residents financial qualification for HUD property Housing.

Subsidized Rules and Regulations

Explains rules and regulations specific to HUD properties.

Following Move-in

- Residents should be moved in on Yardi the same day the resident takes possession of the apartment See the [Yardi Voyager Residential Procedures Guide](#) page 68 for instructions.
- File the signed Lease Packet and other paperwork in the Resident File. See Resident File for more information on creating a Resident File.
- Follow up with the resident within 3-days to obtain the completed Unit Condition Report. This is the perfect time to check with the resident to see if there are any issues or maintenance needs in their new home.
- Compile the Transmittal paperwork and mail to the Central Office.

Housing Authority Residents

What is the Housing Authority?

A Housing Authority can be county or city based. The Housing Authority controls Federal funds that are set-aside to assist qualified residents with their monthly rent payments. The Housing Authority will approve a specific amount of rent to be paid for each apartment size. The amount of payment received from the Housing Authority may not be less than the market rent for the apartment. For example: the rental rate on a 3-bedroom apartment at your community is \$1,800. Based on the resident's income, the Housing Authority has provided the resident a "voucher" (documentation) that the apartment community will receive every month the amount of \$1,000 from the Housing Authority, and the resident will pay \$800 for rent.

When an apartment community accepts Housing Authority payments, a three-way partnership is established. The partnership is comprised of the following:

- The Housing Authority
- The Resident
- The Landlord (Apartment Community)



Be sure to report program abuse by the resident to the Housing Authority

The Housing Authority will send one check per month which will include the housing portion payment for all residents at the property. Many localities now pay electronically and will have a receipt for payments available online. Payments are generally processed on the 1st of every month. See your [Yardi Procedures Guide](#) for instruction on inputting housing payments.

Agreements

Three separate agreements are involved with the Housing Authority, the residents, and the apartment community:

- A contract is established between the Landlord and the Housing Authority for rental assistance payments.
- The Housing Voucher is the agreement between the Housing Authority and the resident for the Housing Authority to assist a resident with their housing costs.
- The Rental Agreement is between the residents and the Landlord.

Housing Authority Responsibilities

The Housing Authority will review a person's application to determine if the household is eligible for financial assistance. Once eligible, the person is issued a Housing Choice Voucher and the Housing Authority will assist the family with finding a place to live. When the prospective resident finds the apartment community they want to live at, the Housing Authority will approve the apartment, the landlord and the landlord's lease. Each month, the Housing Authority will make assistance payments to the landlord. The Housing Authority will also continue to ensure that both the apartment and the resident continues to qualify under the program.

Site Manager Responsibilities

A Site Manager will screen a Housing Authority resident as they would any applicant. When sending in the application to Background Investigations, on top of the application note: "Housing Authority applicant". Fax or email a copy of the Housing Voucher along with the application. The Site Manager will

- maintain the apartment and make any necessary repairs;
- collect the rent portion due by the resident;
- enforce the lease;
- report any program abuse by the resident to the Housing Authority.

Resident Responsibilities

Your residents that receive Housing Authority assistance are responsible for the following:

- Pay their portion of the rent on time.
- Residents are required to restrict residency to those who have been approved by both the Housing Authority and/or the Site Manager.

Try keeping a completed copy of your local Housing Authority's paperwork on hand to make filling out the next set of forms easier.



Resident Management

- Take care of and maintain the condition of their apartment.
- Comply with the terms of the lease.
- Allow the Housing Authority to conduct scheduled inspections.

Note: If a resident pays their portion of rent late, the late fee is based on their portion of the rent only—not the total rent payment. For example, if a resident receiving Section 8 voucher assistance pays \$400 and receives \$800 in assistance for a total of \$1200 rent per month, the late payment for that resident would be \$40.

Before the Housing Authority Resident Moves in

A copy of the Rental Agreement is attached to the Housing Authority's Lease Approval form, thus obligating the future resident to obtain approval. After the Rental Agreement has been approved, the Housing Authority will inspect the apartment. The payment from the Housing Authority begins on the effective date of the Housing Authority lease agreement. The resident may not take possession of the apartment before the signed lease is returned and/or before the effective date, whichever occurs later.

Note: If the resident takes possession of the apartment prior to the effective date, they are required to pay full market rent for those days up to the effective date of the Housing Authority lease. This generally should not occur.

Correspondence from the Housing Authority

Copies of all Housing Authority notices received by the landlord, must be retained in the resident's file. Copies should also be forwarded to the Central Office for filing in the resident file. Notices received may include:

- Notification of change in rent and Housing Authority payment.
- Notification of apartment inspection.
- Notification of failure or passing of apartment inspection.
- Notification of discontinuation of Housing Authority payment.

During the Occupancy of a Housing Authority Resident

The Site Manager is responsible to ensure that required documents and physical requirements of the Housing Authority are maintained. The following outlines the items the Site Manager will be requested to address during the residency of a Housing Authority resident.

The Housing Authority will send the Site Manager a rent increase questionnaire each year. Contact your Supervisor regarding rent increases for a Housing Authority resident. Complete and return the form to the Housing Authority.



If a housing authority resident pays their rent late, the late fee is based on their portion of rent only.

The Housing Authority will complete yearly housing inspections. The site is responsible to repair all failed items from the inspection prior to the lease renewal.

Occasionally, the Site Manager will receive a “Housing Authority Lease Amendment Adjustment” with a new resident amount and a new Housing Authority payment amount. A Site Manager may receive this notice of adjustment more than one time yearly, as the resident portion is based on the resident’s income and may change many times during a 12 month period.

The Site Manager must send copies of all notices presented to the resident to the Housing Authority.

Note: Housing Late fees are equal to 10% of the residents portion where applicable.

Housing Authority Resident Moves Out

When a Housing Authority resident gives a notice to vacate, send a copy of the *Notice to Vacate* to the Housing Authority. If the resident wishes to extend their notice, contact the Housing Authority. The Housing Authority must approve the extension, otherwise the resident must move as scheduled.

If you continue to receive Housing Authority payments after the resident moves out, immediately contact the Housing Authority. Do not deposit these funds without speaking with your Property Supervisor.

Payments and Deposits

Payments received from residents are processed at each property. In addition to payments for application fees and security deposits, recurring monthly fees are either delivered or mailed to the site management office through a designated drop box. Mailed payments must be received by the due date to avoid incurring a late fee.

Accepting Payments

Unless there is direct supervisor approval, never accept rent in advance or more than 5 days prior to the due date. Doing so may cause some of the Landlord rights to be waived. As an example, October’s rent may be accepted on September 25th.

Accept only one check for each unit. This includes units with multiple roommates. If they are not able to provide a single check, roommates may provide multiple money orders, cashier’s checks or any method that is considered secured funds. To accept, the total of the secured payments must equal the total of the rent. A partial rent payment can’t be accepted.

The Site Manager must send copies of all violation letters and nonpayment notices presented to the resident to the Housing Authority.



Payment Types

Acceptable forms of payment are:

- Personal Check payable to the property
- Money Orders payable to the property
- Traveler's Checks payable to the property
- Cash...but only when unavoidable
- Rent Café Payments

Do Not Accept:

- Multiple Checks for rent payment for one unit
- Partial Payment
- 3rd Party Checks
- Cash...if at all possible.

More about checks

- Third party or non-resident checks are not acceptable.
- If not already on the check, add the unit number to the face of the check.
- Review the check to make sure the written amount and the amount in the number field match, that it is dated properly, and has been signed. Improperly filled out checks are likely to be refused by the bank.
- Immediately endorse the back of each check to prevent deposit by another party if the check is lost or stolen.
- Accept only one rental check for each unit except for partial payment from the Housing Authority and residents paying with two certified checks or money orders. This avoids complications if one of the checks comes back NSF.

More about cash

- For security reasons, avoid accepting cash.
- If cash is accepted, a written receipt must be provided. For more information about receipts, see the following Receipt Book section [Office Depot](#) Item #436857.

Money Orders

Money Orders must be made out to the Property prior to being accepted from the resident. Blank Money Orders or Money Orders not payable to the Property may not be accepted.

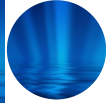
Site Management or staff *may not* complete the name of the property in the "Pay To" section of the money order. As with checks, immediately endorse the back of each Money Order.

Rent Café

Rent Café is an online payment system for residents. Managers should encourage residents to use the online system as it reduces workload and streamlines the payment process for residents.

Many managers have offered incentive programs to help recruit residents to the Rent Café system. If you're interested in doing so, contact your Supervisor for assistance.

Resident Management



Unless there is direct supervisor approval, *never* accept rent in advance or more than 5 days prior to the due date.

Managers need to check the online payment system for payments made on the 4th day of every month prior to posting late fees on the 5th due to possible lag time between the time the payment is made by the resident online and the time the payment shows in the resident ledger in Yardi.

Rent Café for Residents

Rent Café is an online payment system. Residents visit the 'Resident' tab on the property's Website, click 'Pay Rent Online' and they'll be taken to a login page. If they haven't registered yet, that option will also be available to them.

Residents register using their email that's on file with the property and enter their registration code. Their registration code is the same as their Yardi resident ID. The resident then enters more personal information to complete their registration and they'll receive an email to confirm their account information. They'll need to click on a link in the email to complete the process.

Once the registration process has been completed, the resident can add their Check/ACH payment information, Debit Card or Credit Card information to begin paying online.

You should make it a standard practice to invite residents to pay via Rent Café by sending the invitation email from Yardi for every new resident that is moved in to your community.

Bank Deposits

Unless there are no payments on hand, make at least one bank deposit each day. Multiple bank deposits can be made when necessary. To post the same day, the deposit must be received by the bank prior to 3:00 p.m. This is especially important during rent collection time.

See page 124 of the [Yardi Procedures Guide](#) for detailed instructions on how to post payments into the system.

Receipt Book

If cash is provided for any kind of payment, you must immediately provide a written receipt. Include the date of the receipt, amount, reason for payment, name of the person providing the cash and your name. When posting the cash payment to Yardi, enter the receipt number in the check field.

Some residents may ask for a receipt when paying with a check. One can be provided when requested, however, a receipt is not required for non-cash forms of payment.

The Receipt Book ([Office Depot](#) Item #162354) must be a pre-numbered, duplicate style. Fill out the receipt completely.

Receipt	Date <u>April 3, 2007</u>	No. 62580
	Received From: <u>Sam Spade</u>	
	<u>Seven Hundred Fifty</u> Dollars	
	Amount \$ <u>750.00</u> <input type="radio"/> Cash <input type="radio"/> Check <input type="radio"/> Money Order	
	<input checked="" type="radio"/> For Rent	
	<input type="radio"/> Other <u>801 Pleasant Drive</u> Unit# <u>801</u>	
	From: <u>04/01/07</u> To: <u>04/30/07</u>	
Received by: <u>Julie Roberts</u>		

Money orders and Cashiers Checks are considered “certified funds” because the amount is guaranteed by the issuing organization.



Late Fees

On the first day after the rent due date and after collecting and entering on-time rent payments, run the [Post Late Fees](#) function in Yardi to charge Residents who have not paid rent on-time.

The late fee policies are as follows:

- | | |
|---|--|
| Conventional and Tax Credit Properties | Rent is late after the 4th
Late Fee is 10% of Rent (<i>Round Down</i>) (<i>CA not to exceed \$50</i>) |
| HUD Properties | Rent is late after the 5th
Late Fee is \$5 plus \$1 per day (<i>not to exceed \$30 per month</i>) |
| Rural Development Properties | Rent is late after the 10th
Late fee is \$10. |

Non-Sufficient Funds Checks (NSF Checks)

Notification of an NSF check is sent to each property from the Central Office. On receipt of the NSF notice from the Central office, post and mail a Notice of NSF (Form on C238 on [Tenant Tech](#)) to the resident. If this occurs on or after the 8th of the month for a rent payment, they should also be sent a Nonpayment of Rent Notice (M020-PK on [Tenant Tech](#)) if in Oregon or Idaho or a 14-Day Notice to Pay Rent or Vacate (M120c-PK on [Tenant Tech](#)) if in Washington or 3-Day Notice to Pay Rent or Vacate (C198 in California on [Tenant Tech](#)). The resident is charged \$35 for each NSF check.

Note: Use 30-day notice to pay or quit for certain properties.

The resident must replace the NSF payment with a money order or a cashier's check. Another personal check *cannot* be accepted for payment of rent that month. If a resident has two NSF checks within the past 12 months, personal checks *cannot* be accepted for payments of any kind. They must provide certified funds in either a cashier's check or a money order. Be sure to notify affected residents on receipt of the second NSF check. This should be noted in the Notice of NSF form on [Tenant Tech](#) (Form C238) by checking the applicable box.

The NSF count in Yardi can be reset after 12 months from the NSF in Oregon or three months from the NSF in California. Reach out to yardisupport@cresapts.com to have this reset.

Keep Payments Secure

Designate a location in your office where all payments are kept. Don't allow payments to linger on a desk, in an in-box or an area easily accessible to others. This will typically be a locked desk drawer or other secure area. Take deposits to the bank the same day they're received, so no checks are left in the office if a break in were to occur.



If cash is provided for any kind of payment, you must immediately provide a written receipt.

Payment Agreements

Payment agreements are normally not allowed, however, a current resident may be allowed to enter into a payment agreement for payment of a security deposit or any late balances, such as late fees, to avoid eviction proceedings.

- The resident is required to present a letter in writing to request a payment agreement, explaining why and what payment arrangement they would like to make.
- The Site Manager needs to submit the resident's request to the Supervisor for their approval.
- Payment Agreements are *not* allowed for Move-out Charges.

Onsite Transfers

At times, residents at your community will be interested in transferring to a different apartment. On a conditioned approval, resident transfers are handled in much the same way as a standard move-out from their current apartment and a standard move-in to the apartment they're intending to transfer to. The process for obtaining approval to transfer and the transfer process should be explained to the inquiring resident in full before beginning the process.

Transfers during a lease term requires payment of an Early Lease Termination Fee whereas transfers at the end of the lease term do not. A notice to vacate is required for all transfers.

Transferring On Site at a Conventional Community

How a resident qualifies to transfer to a new apartment:

1. Advise your resident that prior to giving permission to transfer that you will need to inspect their apartment. Inform your resident that only residents who are currently in "good standing" will be allowed to transfer. Any residents with housekeeping issues, damages, amounts owing, or any other outstanding lease violations will not "be considered" to be in good standing and will not be allowed to transfer.
2. Check the resident ledger for outstanding balances. If the resident owes money to the property they may be allowed to pay off their balance in order to receive approval for the transfer.
3. Schedule an inspection of the resident's apartment. Inspect for housekeeping issues, and damages beyond normal wear and tear. Residents with limited damages may receive approval but would be required to pay for those damages as part of the transfer process.
4. Also check the resident file for lease violations.

If you are uncertain if a resident requesting a transfer qualifies, contact your Supervisor.

Payment agreements are *not* allowed for most balances.



If the resident is currently under a lease contract, they have two options:

1. The resident can transfer when their current lease expires. They will need to complete a *Resident's Notice to Vacate* within the standard time frame required by their state.
2. The resident can transfer during a lease contract, but they will be required to complete a *Resident's Notice to Vacate* and pay an early lease termination fee and/or specials as stated on the Rental Agreement.

Provide the residents who are interested in transferring apartments with the property specific Criteria for Residency. Have the residents complete a Rental Application. Check with your Property Supervisor regarding charging the charging of a screening fee.

When the resident's application has been approved, they must pay a security deposit (based on the recommendation by the screening agency) for the new apartment and sign an Agreement to Execute a Rental Agreement (M003 on [Tenant Tech](#)). If the resident has a pet, payment of a new Pet Deposit will also be required. Advise the resident that deposits cannot be transferred. If they are to receive a refund of their deposit, it will occur after final accounting for their move-out of their original apartment has been processed.

Follow the steps on page 90 of the [Yardi Operations Guide](#) to process the resident transfer. When the resident moves out of their "old" apartment, all move-out procedures must be completed. When the resident moves into their "new" apartment, a new Rental Agreement as well as all other addenda must be signed as per standard move-in procedures.

Note: Transfers are considered a "move-out/move-in" at a conventional community.

Transferring On Site at a Tax Credit or Rural Development/ Tax Credit community:

Tax Credit and Rural Development/Tax Credit properties must first follow all compliance regulations. Most importantly, *any transfers on a Tax Credit or Rural Development/Tax Credit property must be approved by the Property Supervisor.*

How a resident qualifies to transfer to a new apartment:

Your resident must have completed 6 full months or more of occupancy before a transfer is permitted and the resident must also income qualify as a new move-in. Advise your resident that prior to giving permission to transfer, you will need to inspect their apartment, and that residents must currently be in "good standing" to be allowed to transfer. Residents with housekeeping issues, damages, amounts owing, or lease violations will not be allowed to transfer.

Note: There may be an exception made for a transfer due to a request for a reasonable accommodation or an incident of domestic violence.



Transfers are considered a “move-out/move-in” at a conventional community.

Transferring during a lease contract:

Check your resident’s current *Rental Agreement*. There are some important issues to consider:

1. If the resident *is* currently under their initial lease term, and they wish to transfer, they can do so at the end of the lease term. They will need to complete a *Resident’s Notice to Vacate* within the standard time frame required by their state.
2. If the resident is not currently under their initial lease term, they can transfer during a lease contract, but they would be required to complete a *Resident’s Notice to Vacate* and pay an early lease termination fee and/or specials as stated on the Rental Agreement.

The application and screening:

Provide the residents who are interested in transferring apartments with the property specific Criteria for Residency. Have the residents complete a Rental Application (Form M302 on [Tenant Tech](#)), as well as all other pertinent Tax Credit paperwork. Discuss with your Property Supervisor regarding charging the screening fee

When the resident’s application has been approved, and upon Supervisor approval, residents at a Tax Credit property will have their deposit and if applicable, pet deposit transferred if the move-in is within the same building. Any cleaning/damages charges on the “old” apartment will be require to be paid within 15 days of receipt of the Move-out Statement.

Residents at a Tax Credit property who are “transferring” to an apartment in another building must pay a new deposit (based on the recommendation of the screening agency) and if applicable, a new pet deposit. Follow the steps on page 90 of the [Yardi Operations Guide](#) to process the resident transfer.

When the resident moves out and moves in:

If the resident transfers to an apartment in another building, all move-out procedures must be completed. Refer to the [Yardi Voyager Residential Procedures Guide](#) and follow the instructions on how to complete a move-in and Move-out Statement.

If the resident moves to an apartment within the *same* building you will need to transfer the deposit to the new apartment. Therefore, if there are any damage/cleaning charges for the “old” apartment, charge the items Move-out Accounting. Just remember that there will not be a deposit to apply to any charges as it will have been “moved” to the new apartment.

When the resident moves into their new apartment, a new Rental Agreement as well as other addenda must be signed.

Roommates

Roommate households are a large part of the renter demographic in many communities. Sometimes, roommates work out splendidly, while other times they can end in separation.

Note: All roommate additions/removals should be approved by your supervisor.

There may be an exception made for a transfer due to a request for a reasonable accommodation at a TC/RD Property.



Roommate Additions

Before a new roommate takes occupancy in an apartment, the following steps should be followed:

- The new roommate must apply and qualify per the property specific Criteria for Residency. Include the apartment's Current Resident name(s) on the applicant's Rental Application.
- Upon approval of the application, a new lease must be signed by all residents beginning on the effective day the new resident will move-in. This will be a "file change" when completing the Rental Agreement.
- A roommate addition form should also be signed by all household members (Form M153)
- The lease expiration date does not change. It should retain the same expiration date as listed on the original Rental Agreement.
- New roommate(s) must also sign all lease addenda.
- Once the new roommate has signed the lease and addenda they must also be added to the unit in [Yardi](#) and in [Tenant Tech](#).

Note: Rural Development/Tax Credit and Tax Credit properties must first follow all compliance regulations before considering a change of occupancy.

Notice of Resident Vacating (Roommate Separation) (Form M153)

- When a resident wishes to vacate an apartment that is occupied with other residents ("roommate"), both/all parties must agree.
- All residents on the lease must sign the Notice of Resident Vacating
- It's recommended to have all the interested parties sign the request in the Site Management Office, and *not* release the form to residents to return.
- Before a written request to vacate is approved and any resident is removed from the lease, the remaining resident(s) in the apartment must complete a new application (Form M002 on [Tenant Tech](#)) and income qualify per the property specific Criteria for Residency. See your Property Supervisor about whether to charge application fees in this situation.
- The original Security Deposit will stay with the apartment. If the resident(s) remaining in the apartment requalifies at a higher security deposit rate they will be required to pay the difference prior to receiving approval for the Roommate Separation.
- The resident(s) remaining agree to accept the apartment in its current condition, including responsibility for any damages.

Resident Management



Rural Development/Tax Credit and Tax Credit properties must first follow all compliance regulations before considering a change of occupancy.

- The vacating resident(s) is released from responsibility for any future rent, and cleaning and damage charges that may be incurred upon move-out. They also relinquish all rights to the Security Deposit on hand for the apartment.
- The resident(s) remaining in the residence is required to complete a new application and meet Cambridge's Criteria for Residency, and execute a new rental agreement on terms acceptable to Cambridge. If the security deposit increases due to the change in the residents, the amount of the increase will be the responsibility of the remaining resident(s).
- Remove the exiting resident from the unit in Tenant Tech and Yardi.

Recycling Facilities

The purpose of the recycling program is to encourage resident recycling at our communities by providing convenient recycling facilities and informing residents about recycling procedures through informational flyers in the common areas, articles in resident newsletters, and information at the time of move in to all resident households.

- Have recycling containers conveniently available in all refuse enclosure areas with easy-to-read sorting instructions.
- Work with the local refuse hauler to schedule regular recycling pickups.
- Ask the local refuse hauler if they offer special pickups for items that are not collected as part of the normal recycling program, ie. Electronics, batteries, paint, metal, appliances, etc.
- Engage with residents to see what their recycling needs may be to make sure that the program is responsive to the residents of your community.

Communicate with residents during the Resident Orientation to let them know we offer community recycling and to encourage them to participate.

- Post flyers in common areas to remind residents about the recycling program.
- Display professionally made signs providing ongoing recycling directions and advice.
- Notify residents of changes in recycling program as the system expands.

Resident Notices

Community Announcements

Community-wide announcements are used to inform residents about upcoming community events, like National Night Out, or impactful projects like parking lot resurfacing. Often these notices will be sent by SERC prior to the event. If, however, your property needs to post a Community-wide notice that has not been pre-authorized by SERC, Supervisor approval of the notice is required.

SERC likely has a letter already created for your purpose. Check with your Supervisor to see if they have a letter on file to suit your purpose.

All lease holders must agree to a Roommate Separation or a resident's name cannot be removed from the lease.



Types of Resident Notices

There are various resident notices/letters available on [Tenant Tech](#) for the Site Managers to use to notify residents of violations of the lease or property rules.

Warning and Non-Compliance Violation Letters

A notice of lease infraction should be sent to a resident when a violation of the lease or property rules have occurred. In the event of legal action, the burden of proof will be on the property, so documentation of this specific type of notice is critical.

- Site Managers can send site generated warning letters for late rent, patio and parking infractions and other issues for which [Tenant Tech](#) provides a standard warning letter.
- It is critical to document in the Manager Log (physical log book, Yardi or Tenant Tech) dates and approximate times of witnessed or reported infractions.
- If a standard warning letter from Tenant Tech is not used, the letter must be reviewed by the Supervisor prior to posting and/or mailing.
- Site Managers can request a violation termination letter for serious infractions from the Central Office using the Request for Termination (Continuing Non-Compliance) (Form C059 on [Tenant Tech](#)).

Site Generated Notices

Notifying residents of lease infractions can be challenging for even the most experienced Site Manager. It is sometimes difficult to put what you want to say into words. You want to be professional yet get your point across. Cambridge Real Estate Services has developed form letters to assist Site Managers in the communication process. These violation form letters can be found on [Tenant Tech](#).

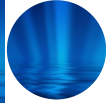
Notices that include any information about the resident or contain private communication must be posted inside of a sealed envelope on the resident's main entry (or all entries to the unit) using painters tape on all four corners of the envelope.

If you can't find a form on Tenant Tech relevant to the issue at your property, contact your Supervisor for advice.

These letters include:

Notice of Disturbance/Noncompliance-M017

This notice can be used for Disturbances, Smoking in non-smoking unit or area of the property, Improper use of Vehicle or Parking Violations, Damage to Property, Unsightly Patio/Balcony/Porch, Dwelling Unit/Unit Needs to be Cleaned, Unauthorized Occupant/Guest, Unauthorized Pet, Parking Violations, Unauthorized Window Coverings/Signs, Satellite Dish, and Other.



[Tenant Tech](#) contains letters to residents for most situations. If you can't find a letter appropriate for your situation, contact your Supervisor for Assistance.

This notice allows you to complete date and time, location and description of the violation.

This notice also allows you to complete and print a Response to a Reporting Resident (Form C099). This should be used to follow up with residents who report infractions to management.

Housekeeping Notice-Form M017

This letter is used to notify a resident of housekeeping or damage issues which were found in their apartment during a recent visit. The letter allows the Site Manager to list the items found to be an infraction. The letter informs the resident they have ten days to remedy/address the concerns listed.

Noise Violation Warning Letter-Form M017

This letter is used to inform a resident of a recent complaint regarding noise disturbances and/or negative conduct emanating from either the resident's apartment or anywhere on the property. The letter also informs the resident of the possibility of the termination of their tenancy should future disturbances occur.

Notice of Parking Violation-Form M016

The purpose of this notice is to inform a resident they are in violation of the community's parking regulations.

Notice of Emergency Entry – Form M110

To be used in cases where emergency entrance to an apartment was necessary listing the date, time and reason for entry. This notice should be posted to the residents door as soon as the emergency situation is remedied.

Abandoned Property Notice – Form M024

Used in instances where residents have vacated their apartment but left belongings behind. Abandoned Property laws vary from state to state. Find policy for your state here.

Controlled Substance Violation Warning Letter – Form M017

Notifies residents that a controlled substance was found in their apartment and that continued violations may result in termination of their tenancy.

Conduct Violation Warning Letter – Form M017

Notifies residents that there has been a complaint regarding negative conduct by one of the household members or guests, describing the specific circumstances, and listing the date and time.

Notice of an Unauthorized Animal – Form M017

Notifies the resident that an unauthorized animal was noted to be in their apartment. Has options for properties with animal restrictions and properties with a 'No Pet' policy.

Notices should be posted to resident doors at eye level using blue painter's tape on all four corners of an envelope. Make a note of the posting in the Manager Log.



Notice of Exclusion (Trespass) – Form M054

Used to inform individuals that they are prohibited from entering or remaining in the common areas of the property. Requires basis of exclusion, date, time, location, and informs the individual that violation of the exclusion may result in arrest for Criminal Trespass.

Unauthorized Resident Letter-Form M017

This letter informs the resident they are in violation of the Rental Agreement as they have an unauthorized guest in their apartment. The letter informs the resident they must cease housing the unauthorized guest or have them complete an application to be added to the Rental Agreement by a date as specific on the letter.

Notice of Reoccurring Late Payments-Form C239

This letter informs the resident they are in violation of the Rental Agreement as they have paid rent past the grace-period. The letter also notifies the resident that in order to comply, they must routinely pay their rent in a timely manner and repeated late rent payments will lead to further action, up to and including the termination of the tenancy.

24 Hour Notice to Enter-Form M013

The purpose of this notice is to inform a resident that a name person or representative of a company will enter their apartment within 24 hours for maintenance/repairs, an inspection or other reason as noted on the form.

2 Day Notice to Enter – Form C023

Washington State and most affordable communities require 2 days' or 48-hour's notice to enter rather than 24 hours. This notice is to inform a resident that a named person or representative of a company will enter their apartment in on a specified date and time no less than two days from the date of the notice for maintenance/repairs, an inspection, or other reason as noted on the form.

Nonpayment/Three Day Notice-Forms M020-PK (OR), M220cv-PK (OR Non-Portland Section 8) 14-Day Notice M120c-PK (WA), M020 (ID) and M015 (CA)

The purpose of these forms are to inform a resident that their rent is at least 72-hours past due. The form provides a due date for the payment of rent, of three days from the effective date of the notice in order for the resident to avoid the termination of tenancy. Refer to Chapter 3 of the Operations Manual for additional information. Each state has different requirements for posting.



For most types of violations, residents are given three chances to remedy the issue before it becomes necessary to take the next step.

Notice of Smoking Violation Letter-Form M017

The purpose of this form is to provide residents who fail to follow a property's smoking policy with a written warning.

Lease Renewal Letter-Form C550-PK (OR non-Portland), C550p-PK (OR—Portland), CM065tcp (LIHTC & HOME—Portland), CM065u (OR Renewal Offer w/Utilities); CM011-PK (CA); M065 (ID); CM065 (WA)

This letter is used by Site Managers at Market/Conventional apartment communities. The letter is sent to notify residents of an upcoming lease expiration and the offer to renew for either another lease term or to maintain a month-to-month status; the letter also states a new rental amount for a lease term and for a month-to-month status. Be sure to adhere to local and state laws when posting renewal offers.

Notice of NSF – Form C238

Notifies residents that their recent check was returned for Non-sufficient funds, that repayment must be made by certified funds, of an NSF fee and late fee if applicable. Also has an option to notify residents that, following two NSF checks in the past twelve months, all future payments must be made by certified funds.

Notification of Balance Due -Form M042 (OR) C250 (CA, ID & WA)

This letter is used by Site Managers to notify a resident of a past due balance on their account and gives residents a pay-by-date.

Balance Due 2nd Letter- -Form C253

The letter is used by Site Managers if a resident has not responded to the Balance Due 1st Letter and gives residents a pay-by-date.

Final Warning of Outstanding Balance – Form C254

Notifies resident of our final attempt to collect a past due balance and gives the resident 3 days to make payment prior to reporting the balance to SERC and issuance of a letter of non-compliance. Should be used after the first two Balance Due Letters.

Lease Buyout Notification – Form C407

Notifies residents that their planned move-out date occurs prior to the conclusion of their lease and that an Early Lease Termination Fee and any other applicable charges have been changed to their account.

When Posting a notice, place it in an envelope, seal the envelope, write the apartment number on the front and post the envelope at eye level using painter's tape.



Notice of Tampering with Alarm/Detector – Form M041 (OR & WA)

Notifies residents that during an inspection of their apartment that their smoke alarm/ carbon monoxide detector had been removed or tampered with incurring a \$250 fine.

Serving Notices from the Site Office

There are three methods to serve notices to your residents:

1. **The Best Method**—To personally serve a member of the household on the lease who is at least 18 years of age
2. **The Recommended Method if unable to Personally Serve**—To Post and Mail (adding 3 days)
3. **The Other Method (not Recommended)**—To Mail only (adding 3 days)

It's highly recommended that all notices be posted and mailed if personal delivery is not possible. Posting and mailing helps mitigate the risk that a resident may not retrieve mail on a regular basis or may enter an apartment through a secondary entrance such as a garage, patio or rear door. When Posting a notice, place it in an envelope, seal the envelope, write the apartment number on the front and post the envelope at eye level using painter's tape on all four corners of the envelope. When mailing the notice, mail it via regular US Mail. It is not necessary to mail via Certified Mail.

Note: In Idaho, an attempt must be made to serve residents personally. If a resident cannot be served a notice *must be* posted to the entry *and* mailed.

Address notices to be mailed to residents using every Lease Holder's name followed by "And All Other Tenants in Possession". For example:

Jon Ronson, David Wallace, Arthur Miller
 And all other Tenants in Possession
 1234 SE Happy Valley Road #123
 Happy Valley, OR 97205

Note: Technically, it is possible to just post a *24-Hour Notice to Enter*. However, this exception has risks, therefore, it is recommended that site personnel make every effort to post these notices in a highly visible location (or locations) at the entry (all entrances) to the apartment, and the box marked "Hand-delivered" is checked on the form for clarity of record keeping. If Residents fail to comply with violation notices the next step is to request a Termination letter from your Supervisor and SERC staff.



Partial rent payments will not be accepted. That includes payment by two personal checks.

Collecting Balances Due

Balances due can accumulate on a resident's ledger for a number of reasons: late fees, damages, unpaid RUB charges, etc. If a routine collection process isn't in place, balances can accumulate quickly, putting your property in a undesirable situation. Use the following schedule for posting Balance Due Letters to stay on top of Balances Due.

Reminder: Partial rent payments will not be accepted. That includes payment by two personal checks. If residents wish to pay separately, only two certified payments (money orders or cashiers checks) received at the same time will be accepted.

Posting Schedule for Balance Due and Related Notices

5th of the month:

For all balances owing - **Notification of Balance Due** (M042)

- List balances due
- Due date: 7th of the month

8th of the month:

If rent has not been paid - **Notice to Pay or Quit** (depending on state)

- See section on Nonpayment and 3-Day Notices, and 14-Day Notices specific to your state

If rent has been paid, but a balance remains on the account - **2nd Balance Due Letter** (C253)

- List the total amount due to the property
- Due Date: 15th of the month

Always mail early. For Example: A 60 Day Reminder Notice should be mailed within 65 days.



16th of the month:

Report expired Notices to Pay or Quit to SERC.

If rent is satisfied, but a balance remains on the account, either:

- a) Issue **Final Warning of Outstanding Balance** (C254)
 - List total amount due to the property
 - Include date of earliest unpaid balance
 - Due Date: 22nd of the month
- a) If 90-day past due balance exceeds 30% of resident's base rent, send a **30/14 request** to SERC (C059)

20th of the month:

Report outstanding balances to your supervisor to see if they want to pursue a 30/14

24th of the month:

For those residents with a credit on their account - **Credit Balance Letter** (M043)

- List credit on the Resident's account
- List amount due to the property on the 1st of the month taking into account rent and all other charges.

Special Notices to Recertify

(Tax Credit and Rural Development Properties)

There are special forms in Tenant Tech to notify tax credit and rural development residents of the annual recertification of income process.

It is critically important that all Site Managers on Tax Credit and Rural Development properties use every notice referenced below during the recertification process. The use of these notices on very tight time schedules will help protect your property from a compliance audit finding in the event a resident fails to recertify in a timely manner.



The types of notices available for use differs depending on the State in which your property is located.

120 Day Recertification of Annual Income Notice-Form C352

This notice is the first notice of certification which is issued 120 days prior to the effective date of the resident's annual recertification.

90 Day Recertification of Annual Income Notice-Form C350

This notice is the second notice of certification which is issued 90 days prior to the effective date of the resident's annual recertification.

Annual Recertification-60 Day Reminder Notice-Form C351

This notice is the third notice in the certification process. The notice serves as a reminder that all residents must comply with the recertification procedure.

30 Day Notice to Recertify-Form C401

This notice informs the resident that they have failed to recertify as required by law. (This is the "For Cause" notice.)

Note: Always mail early. For example: A 60 Day Reminder Notice should be mailed within 65 days.

If a resident receives a 30-Day Notice to Recertify and still fails to recertify, upon the expiration of the old certification, the Site Manager contact Compliance and their Supervisor with a request to issue a 30/14 or 60/14, whichever is applicable. This protects the property from an audit finding, which would show that the unit was not recertified in a timely manner.

Here's an example timeline for serving the three recertification notices:

1. Resident moves into the property on August 5, 2023.
2. Recertification deadline is August 1, 2024.
3. *Annual Recertification of Income Notice* (120-day notice) must be served on or about March 25, 2024.
4. *Annual Recertification of Income Notice* (90-day notice) must be served on or about April 25, 2024.
5. *Annual Recertification 60 Day Reminder Notice* (60-day notice) must be served on or about May 25, 2024.
6. *30 Day Notice to Recertify* must be served on or about June 25, 2024.

Central Office Generated Notices

There are specific types of notices and letters generated from the Central Office. These notices are requested by the Site Manager in the event they have not received cooperation from a resident after sending an initial notice of an infraction.

The types of notices available for use differs depending on the state your property is located in, the lease in use, and the situation. Refer to the section for your State for specifics about which notice to request for your particular circumstance – Oregon, California, Idaho, Washington.

The following instructions for requesting a violation letter apply to all locales.

Mark your Calendar to help you remember to follow up with Notices.



Requesting a violation letter from Central Office

If you have a situation when there has not been cooperation from a resident to cure a breach of the Rental Agreement, follow these steps to request one of the above-mentioned violation letters:

Step #1

- The Request for Termination (Continuing Non-Compliance) can be found in on [Tenant Tech](#) (Form C059). The form can be printed blank and information can be hand printed into all the fields (print legibly), or you can type into the fields.
- The information entered into the form should be brief and to the point. The key is to provide all specific information pertaining to the situation, and to exclude unnecessary or extraneous information. If you're uncertain if some information is pertinent, contact your Supervisor for advice.
- Email the Request for Termination (Continuing Non-Compliance) to your Supervisor.

Step #2

- When the Central Office receives the Request for Termination (Continuing Non-Compliance), your Supervisor will review the form and the appropriate letter or notice.
- All letters will be prepared by the Central Office.
- The Central Office will send a copy of the letter and a Proof of Service form to the Site Manager via fax or email. Upon receipt, the Site Manager will make two copies of the letter — there will be three copies total.
- One copy of the letter is placed in an envelope. Personal service (handed to a resident listed on the Rental Agreement) must be attempted. If personal service is not possible, the notice is placed in a sealed envelope, posted at eye-level, and taped at all four corners on the main entrance of the apartment. The Site Manager will mail another copy. The last copy will be placed in the resident's file at the site. The Central Office will mail the "original" copy to the resident.
- The Site Manager will complete the Proof of Service form and will fax or email the form to the Central Office. The Proof of Service form is placed in the resident file for documentation.

Note: It's always important to follow up on violation notices whether they are Site Office generated or Central Office generated. If the resident corrects the violation ("cures" the notice) you need to notify them in writing that the cause for the termination has been resolved, and the termination notice is withdrawn.



If a resident fails to comply by the conclusion of the 14-day period, then the Site Manager must submit another Request for Termination

Oregon and Washington

30 Day Notice With 14 Days to Cure (also known as a 30/14)

This legal notice is sent to a resident if there is a material noncompliance with the Rental Agreement. This letter serves as a written notice to the resident terminating the tenancy for a particular cause, such as failure to pay accrued late or utility charges, excessive noise, failure to pay damages, misconduct, etc.

The notice specifies the acts constituting the breach and shall state that the rental agreement will terminate upon a date not less than 30 days after delivery of the notice. If the breach is remediable by repairs, payment of damages, payment of a late fee or utility charge, change in conduct or otherwise, the notice shall also state that the resident can avoid termination if the breach has been remedied at the conclusion of a 14-day period.

If the breach is not remedied at the conclusion of the 14-day period, the rental agreement shall terminate as provided in the notice. If the resident adequately remedies the breach before the date for remedying as specified in the notice, the rental agreement does not terminate.

Note: If a resident fails to comply by the conclusion of the 14-day period, then, between the 15th and 18th day, the Site Manager must submit another Request for Termination (Continuing Non-Compliance) to the Central Office requesting an Eviction. Notify your Supervisor for final termination letter follow-up.

The letter will state a termination date, which is 33 days from the date the notice is served. That is 30 days for residency to terminate and adding 3 days to mail. Since the notice expires one minute after midnight, 34 days are actually counted.

The remedy date as stated in the notice is 17 days from the date the notice is served. That is 14 days to remedy and adding 3 days to mail.

However, if the same act of breach reoccurs within six months after the date specified in that notice as the date for remedying the prior noncompliance, the Site Manager may terminate the rental agreement upon at least 10 days written notice specifying the breach and the termination of the rental agreement. (See 10 Day Notice)

For example: A resident received a 30/14 notice for noise in the month of September. During the month of November, another noise complaint was received. Therefore, the Site Manager can request a 10-Day Notice and the resident's agreement would be terminated. The resident does not have the right to cure the subsequent breach.

Proper documentation of the events leading to the 30/14 request is important should the issue arrive in court. Check the following prior to submitting your request for a 30/14.

- **Details** — are there specific dates and details of offenses, not just general “too much traffic”, “several noise complaints”, etc. Ideally, such documentation is verifiable whether by multiple

Remedies must be specific and realistic.



Oregon and Washington

tenant witnesses (i.e. it's not one tenant's word against another) or the violation is witnessed by a staff member, a reliable third party (e.g. police officer or security guard), or it is documented on video.

- **Remedy** — are there specific, realistic remedies listed that apply to the listed offenses. A remedy can't just be "all traffic to unit must stop".
- **Did the resident ever "cure" or "remedy"** — did the residents do what was required to remedy the situation by the conclusion of the 14 day period identified in the notice? (i.e., if it was for non-payment of a security deposit, utilities, etc., did they make payment in full? If it was because they were loud, and neighbors were complaining, did they change the behavior and the complaints stopped?).
- **If the resident never remedied the situation**, documentation of the continuing problem will likely be required. If the notice was for non-payment of money the attorney will only need the manager's verbal affirmation that the resident never paid. But if the notice was behavior related, etc., there needs to be specific documentation including dates and times the resident re-offended. As long as the documentation is good, and the offenses are serious enough, the attorney can file the eviction based on the 30-Day Notice.
- **If the resident remedied by the conclusion of the 14 day period**, but then committed the same or similar offenses within a six month period from the original 30/14 Notice issue date, a 10 Day Notice needs to be issued. The attorney would then file the eviction after the expiration of the 10-day notice.

10 Day Notice (to Vacate)

A resident would receive a 10 Day Notice (to vacate) if:

- A subsequent breach occurs following the a 30/14 Notice. The breach and the date of termination of the Rental Agreement must be specified.
- When a resident keeps a pet on the premises in violation of the *Rental Agreement* capable of causing damage to persons or property, and the resident refuses to sign a *Pet Agreement* or pay the required pet deposit. The landlord may deliver a written notice specifying the violation and stating that the tenancy will terminate upon a date not less than 10 days after the delivery of the notice unless the resident removes the pet from the premises prior to the termination date specified in the notice.

The 10 Day Notice (to vacate) letter will state a termination date, which is 13 days from the date the notice is served. That is 10 days for the residency to terminate and adding 3 days to mail. Since the notice expires one minute after midnight, 14 days are actually counted.



A 24-Hour Notice to Vacate is generally used in situations which threaten life or property or for serious incurable violations.

Oregon and Washington

24 Hour Notice to Vacate

A resident would only receive a 24-Hour Notice to vacate in very unusual circumstances; for example:

- If a resident (or guest of a resident) or a resident's pet seriously threatens personal injury upon a person on the property other than the resident;
- If a resident (or guest of a resident) endangers a person on the property by creating a serious risk that could cause personal injury;
- If a resident (or guest of a resident) or the resident's pet should injure a neighbor living in the immediate vicinity of the premises;
- If a resident (or guest of a resident) causes substantial damage to the premises, or the resident's pet inflicts substantial damage to the premises on more than one occasion;
- If a resident intentionally provided substantial false information on their application for tenancy within the past year; the false information was with regard to a criminal conviction of the resident that would have denied the application;
- If a resident has vacated their apartment and the apartment is now in possession of a person that does not have written permission of the landlord to reside in the apartment, and the landlord has not knowingly accepted rent from the person in possession;
- If a resident (or guest of a resident) or the resident's pet commits an act that is considered outrageous on the premises or in the immediate vicinity of the premises. An act that is "outrageous in the extreme" is an act that a reasonable person in that community would consider to be so offensive as to warrant termination of the tenancy within 24 hours, considering the seriousness of the act or the risk to others. Such acts of "outrageous in the extreme" would be: prostitution or promotion of prostitution; manufacture, delivery or possession of a controlled substance; intimidation; burglary.
- If a tenant perpetrates a criminal act of physical violence related to domestic violence, sexual assault, or stalking against a household member who is a tenant, you can terminate the perpetrator (not the victim or other household members)

Routinely checking your drop box first thing on the morning of the 5th ensures late fees are applied consistently and according to policy.



Oregon and Washington

30-Day Notice with Cause

A 30-Day Notice with Cause to vacate, can be given to a resident during a lease term. This type of letter is sent when there are numerous infractions, such as an excessive number of noise complaints, continuing to pay rent late, continued non-payment of late fees or utility charges. *This notice may not be allowed by some lease agreements.*

Nonpayment of Rent Notice

For legal purposes, each notice must be filled out correctly. Incorrect information can lead to the court ruling in favor of the resident. These steps will help you to accurately complete the Nonpayment of Rent Notice.

- List all legal and responsible occupants in the apartment.
- In your manager's log, list the time and date that each item was mailed, posted, or hand-delivered. (These notices generally go out on the 8th of the month)
- See the chart on the following page for the Expiration date for your State and/or program.
- List all charges separately.
- The amount of rent that you list as past due must match the amount of rent on the rental agreement. The rent amount is not inclusive of all amounts, such as garage rent, storage. rent, etc.

Note: Managers are encouraged to check the drop box on morning of 5th whether or not office is open to secure all checks present as of that time. Late fees should be assessed based on the assumption that all checks in the drop box on the morning of the fifth were received on-time. All payments received afterward are late.

30-Day Notice of Nonpayment

For properties that are affordable (Tax Credit, HOME, HUD and/ or RD)—you are now required to send a 30-day Notice of Nonpayment Packet.

For properties that are conventional; that have a federally backed mortgage—you are required to send a 30-day Notice of Nonpayment Packet. Contact your Supervisor if you believe your property meets this requirement.

For any all other households that have a Section 8 voucher)—you are now required to send a 30-day Notice of Nonpayment Packet.

These notices are issued on the 8th of the month, rent must be paid by the 22nd. If rent is not paid by the 22nd then the resident must then vacate 34 days from the issuance date. If the resident does not vacate by the date listed on the notice, file the next day.



Count the days carefully!

Oregon and Washington

When a Nonpayment Notice should be Served:

- If the resident has failed to pay rent by the 8th calendar day of the month.
- If the resident pays rent on time but Notice of an NSF is received on or after the 8th calendar day of the month.

Nonpayment Notice & Late Fee Schedule for Oregon & Wash-

	Rent Due Date	Late Fee Assessed	Delivery Date	Notice Expires	First Day to File
Oregon Conventional Notice for Non-Payment	1st of the Month	After 11:59pm on the 4th of the month. Late fee is the amount stated on the rental agreement, up to (but not to exceed) 10% of base rent.	8th of the month	14 days (11 Days + 3 for Mailing) after notice is issued at 11:59pm. (EX: A notice served on the 8 th expires at 11:59pm on the 22 nd and sent for filing on the 23 rd) Add 1 day to length of notice for: <ul style="list-style-type: none"> • For each day before expiration that property is closed if the property does not have a 24-hour accessible drop box. • For each bank holiday occurring during notice period. 	1st day after the notice expires
Washington Conventional 14-Day Notice to Pay Rent	1st of the Month	After 11:59pm on the 4th of the month. Late fee is the amount stated on the rental agreement, up to (but not to exceed) 10% of base rent.	8th of the month	14 days + 1 for mailing or 30 days +1 for mailing	16 days after the service date or 31 days after service date.
Tax Credit	1st of the Month	Same as Conventional	8th of the month	Same as State	1st day after the notice expires
RD	1st of the month	After 11:59pm on the 10th of the month. Late fee is \$10	8th of the month	Same as State	1st day after the notice expires
HUD	1st of the Month	After 11:59pm on the 5th of the month. Late fee is \$5, plus \$1 for each additional day late (NTE resident portion of rent) up to 30 days.	8th of the month	Same as State	34 Days (31+3 days for mailing) after notice is issued. Use 30 day notice of non payment
Portable Section 8 Voucher holders	1st of the Month	After 11:59pm on the 4th of the month. Late fee is the amount stated on the rental agreement, up to (but not to exceed) 10% of base rent for the Resident's Net Tenant Portion of Rent.	8 th of the month	Same as State	34 Days (31+3 days for mailing) after notice is issued. Use 30 day notice of non payment
NSF Check	—	Add an NSF fee. If a late fee has not yet been added and the NSF occurs after the late fee deadline, add a late fee based on the state/program	Issue on the day that the NSF notice is received	Same as State	

When a resident is month-to-month and has resided in the premises for one year or more a 60-day notice is required.



California

The Extended Notice Provision

Special Circumstances for California properties

California residential landlords are **only** required to serve residents with a 60-day notice to vacate instead of a 30-day notice to vacate in the following circumstances: **when the residency is month-to-month and the resident has resided in the premises for one year or longer.**

The following points will clarify:

- This does not affect residents under fixed lease terms. What does that mean? It means if a resident is currently on a lease agreement with an actual expiration date, they are not on a month-to-month status, therefore they can receive a 30-day notice to quit.
- This primarily applies to a landlord's decision to terminate tenancies either for cause or without cause.
- Another stipulation is that the resident must be in possession of the apartment for at least one year for the extended notice provision to apply; otherwise, the landlord can serve a 30-day notice to quit.

In the event "any" resident in the household has resided there less than one year, the landlord is allowed to give a 30-day notice. If a landlord plans to take advantage of this exception, the landlord should be prepared to provide proof that one or more of the residents of the apartment has resided there for less than one year.

The resident must pay rent through the last day of the notice or they can be served with a notice to pay rent or vacate. If the landlord accepts rent that goes beyond the 30-or 60-day notice, the notice is presumed to have been invalidated by the landlord.

Here are some examples:

- A resident moved into the property 6 months ago. Their lease just expired, and they are on month-to-month tenancy. They can receive a 30-day notice to terminate (remember...their residency has to be for one year or longer).
- A resident has lived at your property for 6 years. They have been on a month-to-month status for one year now. They can receive a 60-day notice to terminate.

Finally, note that all other notices are still enforceable, such as a 3-Day Notice — this would be exempt from this rule.



If you're not sure, check with your Supervisor or Supervisor to determine which notices are appropriate for your situation.

California

To recap: The law requiring a 60-day notice to quit only pertains to residents who are on a month-to-month rental agreement and only if they have been in possession of their apartment for one year or longer.

Oregon, Washington, California, and Idaho law provide the landlord the right to issue a 3-Day notice on the 8th day of the month to any resident who has not paid rent by the end of the 7th day of the month. This notice provides the resident with a 3-day period to either pay rent or vacate the premises.

30-Day Notice with Cause

A 30-Day Notice with Cause to vacate, can be given to a resident during a lease term. This type of letter is sent when there are numerous infractions, such as an excessive number of noise complaints, continuing to pay rent late, continued non-payment of late fees or utility charges. *This notice may not be allowed by some lease agreements.*

3-Day Notice to Quit (Non-Compliance—Curable)

To be used for any act that violates the lease contract.

- Breach or noncompliance with a material provision in the lease agreement
- Creating a nuisance such as accumulating trash and debris on the property
- Conduct that Material affects the health and safety of others
- Unlawful activity on the premises

The 3-day notice to vacate must be served personally on the tenant, on a subtenant of sufficient age and discretion and by mailing the California eviction notice; or by serving the tenant at his or her place of business. If none of these can be accomplished, then alternative service can be accomplished by affixing a copy to the apartment's main entrance and mailing a copy.

**Errors on forms can result in a loss at court.
Always double check the details.**



California

3-Day Notice for Non-Payment

For legal purposes, each notice must be filled out correctly. Incorrect information can lead to the court ruling in favor of the resident. These steps will help you to accurately complete the 3-Day Notice.

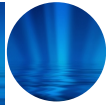
- List all legal and responsible occupants in the apartment.
- The Delivery Date is the day the notice is served to the resident. (Usually the 8th of the month.)
- In your manager's log, list the time and date that each item was mailed, posted, or hand-delivered.
- The Effective Date is the day following the Delivery Date. (For example, if the delivery date is the 8th, the Effective Date will be the 9th.)
- See the chart on the following page for the Expiration date for your State and/or program.
- List all charges separately.
- The amount of rent that you list as past due must match the amount of rent on the rental agreement. The rent amount is not inclusive of all amounts, such as garage rent, storage rent, etc.

Note: Managers are encouraged to check the drop box on morning of 5th whether or not office is open to secure all checks present as of that time. Late fees should be assessed based on the assumption that all checks in the drop box on the morning of the fifth were received on-time. All payments received afterward are late.

When a 3-Day Notice for Non-Payment should be Served:

- If the resident has failed to pay rent by the 8th calendar day of the month.
- If the resident pays rent on time but Notice of an NSF is received on or after the 8th calendar day of the month. Just remember that the Effective Date is the day after the 3-Day notice Delivery Date. For example, if the Delivery Date is the 9th of the month, the Effective Date will be the 10th of the month.

Note: In California, 3-Day notices may be filed as early as the 2nd day of the month and expire as early as the 5th at 11:59pm. As a courtesy to residents, Cambridge chooses to wait until the 8th of the month to file notice.



Late Fee schedules are different for different programs. Check dates and amounts on the chart below.

California

3-Day Notice and Late Fee Schedule for California

	Rent Due Date	Late Fee Assessed	Delivery Date	Effective Date	Notice Expires	First Day to File
California Conventional 3-Day Notice for Non-Payment	1st of the Month	After 11:59pm on the 4th of the month. Late fee is the amount stated on the rental agreement, up to (but not to exceed) \$50	8th of the month	9th of the month	4 days after notice is issued at 11:59pm. Add 1 day to length of notice for every day before expiration that property is closed if the property does not have a 24-hour accessible drop box. Add 1 day to the length of the notice for holidays; days banks are closed; the date a notice is posted/served; Saturdays; Sundays	1st day after the notice expires
RD	1st of the month	After 11:59pm on the 10th of the month. Late fee is \$10	8th of the month	9th of the month	Same as State	1st day after the notice expires
HUD	1st of the Month	After 11:59pm on the 4th of the month. Late fee is \$5, plus \$1 for each additional day late up to 30 days	8th of the month	9th of the month	Same as State	1st day after the notice expires
NSF Check	–	Add an NSF fee. If a late fee has not yet been added and the NSF occurs after the late fee deadline, add a late fee based on the state/program	Issue on the day that the NSF notice is received	1st day after the notice delivery	Same as State	1st day after the notice expires

If a resident fails to comply by the conclusion of the 14-day period, then the Site Manager must submit another Request for Termination



Idaho

30 Day Notice With 14 Days to Cure (also known as a 30/14)

This legal notice is sent to a resident if there is a material noncompliance with the Rental Agreement. This letter serves as a written notice to the resident terminating the tenancy for a particular cause, such as failure to pay accrued late or utility charges, excessive noise, failure to pay damages, misconduct, etc.

The notice specifies the acts constituting the breach and shall state that the rental agreement will terminate upon a date not less than 30 days after delivery of the notice. If the breach is remediable by repairs, payment of damages, payment of a late fee or utility charge, change in conduct or otherwise, the notice shall also state that the resident can avoid termination if the breach has been remedied at the conclusion of a 14-day period.

If the breach is not remedied at the conclusion of the 14-day period, the rental agreement shall terminate as provided in the notice. If the resident adequately remedies the breach before the date for remedying as specified in the notice, the rental agreement does not terminate.

Note: If a resident fails to comply by the conclusion of the 14-day period, then, between the 15th and 18th day, the Site Manager must submit another Request for Termination (Continuing Non-Compliance) to the Central Office requesting an Eviction.

The letter will state a termination date, which is 33 days from the date the notice is served. That is 30 days for residency to terminate and adding 3 days to mail. Since the notice expires one minute after midnight, 34 days are actually counted.

The remedy date as stated in the notice is 17 days from the date the notice is served. That is 14 days to remedy and adding 3 days to mail.

However, if the same act of breach reoccurs within six months after the date specified in that notice as the date for remedying the prior noncompliance, the Site Manager may terminate the rental agreement upon at least 10 days written notice specifying the breach and the termination of the rental agreement. (See 10 Day Notice)

For example: A resident received a 30/14 notice for noise in the month of September. During the month of November, another noise complaint was received. Therefore, the Site Manager can request a 10-Day Notice and the resident's agreement would be terminated. The resident does not have the right to cure the subsequent breach.

Proper documentation of the events leading to the 30/14 request is important should the issue arrive in court. Check the following prior to submitting your request for a 30/14.

- **Details** — are there specific dates and details of offenses, not just general “too much traffic”,



Remedies must be specific and realistic.

Idaho

“several noise complaints”, etc. Ideally, such documentation is verifiable whether by multiple tenant witnesses (i.e. it’s not one tenant’s word against another) or the violation is witnessed by a staff member, a reliable third party (e.g. police officer or security guard), or it is documented on video.

- **Remedy** — are there specific, realistic remedies listed that apply to the listed offenses. A remedy can’t just be “all traffic to unit must stop”.
- **Did the resident ever “cure” or “remedy”** — did the residents do what was required to remedy the situation by the conclusion of the 14 day period identified in the notice? (i.e., if it was for non-payment of a security deposit, utilities, etc., did they make payment in full? If it was because they were loud, and neighbors were complaining, did they change the behavior and the complaints stopped?).
- **If the resident never remedied the situation**, documentation of the continuing problem will likely be required. If the notice was for non-payment of money the attorney will only need the manager’s verbal affirmation that the resident never paid. But if the notice was behavior related, etc., there needs to be specific documentation including dates and times the resident re-offended. As long as the documentation is good, and the offenses are serious enough, the attorney can file the eviction based on the 30-Day Notice.
- **If the resident remedied by the conclusion of the 14 day period**, but then committed the same or similar offenses within a six month period from the original 30/14 Notice issue date, a 10 Day Notice needs to be issued. The attorney would then file the eviction after the expiration of the 10-day notice.

10 Day Notice (to Vacate)

A resident would receive a 10 Day Notice (to vacate) if:

- A subsequent breach occurs following the a 30/14 Notice. The breach and the date of termination of the Rental Agreement must be specified .
- When a resident keeps a pet on the premises in violation of the *Rental Agreement* capable of causing damage to persons or property, and the resident refuses to sign a *Pet Agreement* or pay the required pet deposit. The landlord may deliver a written notice specifying the violation and stating that the tenancy will terminate upon a date not less than 10 days after the delivery of the notice unless the resident removes the pet from the premises prior to the termination date specified in the notice.

The 10 Day Notice (to vacate) letter will state a termination date, which is 13 days from the date the notice is served. That is 10 days for the residency to terminate and adding 3 days to mail.

For residents in Idaho on a MTM lease, the notice must be served prior to the beginning of the month and terminate at the end of the month.



Idaho

Since the notice expires one minute after midnight, 14 days are actually counted.

3-Day Notice to Quit (Non-Compliance)

A 3-Day Notice to Vacate is used only in very specific situations.

- Breach or noncompliance with a material provision in the lease agreement
- Creating a nuisance such as accumulating trash and debris on the property
- Conduct that materially affects the health and safety of others
- Unlawful activity on the premises

The 3-day notice to vacate must be served personally on the tenant, on a subtenant of sufficient age and discretion and by mailing the Idaho eviction notice; or by serving the tenant at his or her place of business. If none of these can be accomplished, then alternative service can be accomplished by affixing a copy to the apartment's door or leaving it in a conspicuous place and mailing a copy



Routinely checking your drop box first thing on the morning of the 5th ensures late fees are applied consistently and according to policy.

Idaho

3-Day Notice to Pay Rent or Vacate

For legal purposes, each notice must be filled out correctly. Incorrect information can lead to the court ruling in favor of the resident. These steps will help you to accurately complete the 3-Day Notice.

- List all legal and responsible occupants in the apartment.
- The Delivery Date is the day the notice is served to the resident. (Usually the 8th of the month.)
- In your manager's log, list the time and date that each item was mailed, posted, or hand-delivered.
- See the chart on the following page for the Expiration date for your State and/or program.
- List all charges separately.
- The amount of rent that you list as past due must match the amount of rent on the rental agreement. The rent amount is not inclusive of all amounts, such as garage rent, storage, rent, etc.

Note: Managers are encouraged to check the drop box on morning of 5th whether or not office is open to secure all checks present as of that time. Late fees should be assessed based on the assumption that all checks in the drop box on the morning of the fifth were received on-time. All payments received afterward are late.

When a 3-Day Notice should be Served:

- If the resident has failed to pay rent by the 8th calendar day of the month.
- If the resident pays rent on time but Notice of an NSF is received on or after the 8th calendar day of the month.

Late Fee schedules are different for different programs. Check dates and amounts on the chart below.



Idaho

3-Day Notice and Late Fee Schedule for Idaho

	Rent Due Date	Late Fee Assessed	Delivery Date	Notice Expires	First Day to File
Idaho Conventional 3-Day Notice for Non-Payment	1st of the Month	After 11:59pm on the 4th of the month. Late fee is the amount stated on the rental agreement, up to (but not to exceed) 10% of base rent.	8th of the month	4 days after delivery at 12:01am. Add 1 day to the length of the notice for every day before expiration that the office is closed if the property does not have a 24-hour accessible drop box. Add 1 day to length of the notice for each bank holiday occurring during the notice period.	4 days after 3-Day notice delivery
Tax Credit	1st of the Month	Same as Conventional	8th of the month	Same as State	See Notice of Non-payment
RD	1st of the month	After 11:59pm on the 10th of the month. Late fee is \$10	8th of the month	Same as State	See Notice of Non-payment
HUD	1st of the Month	After 11:59pm on the 4th of the month. Late fee is \$5, plus \$1 for each additional day late up to 30 days.	8th of the month	Same as State	See Notice of Non-payment
NSF Check	–	Add an NSF fee. If a late fee has not yet been added and the NSF occurs after the late fee deadline, add a late fee based on the state/program	Issue on the day that the NSF notice is received	Same as State	4 days after 3-Day Notice Delivery/ See 30 Day Notice of Nonpayment



Proofread! Incorrect information on a nonpayment of rent Notice can lead to the court ruling in favor of the resident.

Proofing Your Notice

An improperly completed 10-Day Notice, 30-Day Notice or 3-Day Notice to Pay Rent or Vacate could lead to complications in court. Use the Resident File to double check all information.

When notifying your property's lawyer with a request to file an eviction, they will check for the following:

Dates—Make sure the dates are accurate. A Nonpayment of Rent Notice shouldn't be sent to a resident prior to the 8th day of the month in which rent is due. These notices should be sent on the 8th of the month.

Names—All adults listed on the Rental Agreement must also be listed on the notice, and the spelling must match. The exception is if one or more of the adults has moved out and the Site Manager notifies the property's lawyer that one or more of the residents has been released from the Rental Agreement by providing a copy of the Roommate Separation form documenting the release.

Address—The address on the Nonpayment of Rent notice must match the address on the Rental Agreement, including the zip code, apartment numbers, etc.

Rent—The base rent on the Nonpayment of Rent Notice must match the monthly rent listed on the Rental Agreement. Make sure to not include anything but the base rent before the "You must pay this amount to avoid eviction" section of the Nonpayment Notice. It cannot include charges for garage/carport rental, storage fees, late fee, utilities, etc. You will list these out in the statement of account section. Only include the current month rent amount in the first "Past due rent" section.

Has the notice "expired"?—Did you wait the correct number of days/hours before sending the eviction notification to your property's lawyer. Check the Chart on the previous page for accurate dates for your location and program.

MULTIFAMILY NW The Association Promoting Quality Rental Housing		OREGON 10-DAY NOTICE OF TERMINATION FOR NONPAYMENT OF RENT		CAMBRIDGE real estate services																												
DATE	11/08/2023	PROPERTY NAME / NUMBER	Red Tail Canyon Apartments	814																												
RESIDENT NAME(S)																																
UNIT NUMBER	STREET ADDRESS 8128 SE Aspen Summit Drive																															
CITY	Portland	STATE	OR	ZIP	97266																											
<p>This is to inform you that your rent is now more than seven (7) days past due. This is your 10-Day written notice to pay your past due rent or your Rental Agreement will terminate as provided by Oregon Landlord/ Tenant law.</p> <p>Rent Amount Due \$ 2,000.00. You must pay only this amount to avoid termination. However, you remain responsible for all other charges and outstanding amounts.</p> <p><input type="checkbox"/> If this box is checked, your Rental Agreement requires payment by means other than a personal check, third-party check or multiple checks. Money order or certified check preferred.</p> <p><input type="checkbox"/> This Notice has been served personally at _____ AM _____ PM. Your rent payment must be paid by _____ AM _____ PM on _____ DATE or your tenancy will terminate automatically without further notice.</p> <p><input checked="" type="checkbox"/> If written rental agreement allows, this Notice has been served by posting on the main entrance door of the dwelling unit and mailed first class mail. Your rent payment must be paid by 11:59 p.m. on 11/22/2023 or your tenancy will terminate automatically without further notice.</p> <p><input type="checkbox"/> This Notice has been served by first class mail and the effective date is extended by four days including the date mailed. Your rent payment must be paid by 11:59 p.m. on _____ DATE or your tenancy will terminate automatically without further notice.</p> <p>Owner/Agent: Please note additional service requirements for subsidized residents as listed in "Subsidized Residents Only" section below.</p> <p><input type="checkbox"/> Section 8 Housing Choice Voucher</p> <p>Make payable to (name and delivery location): Red Tail Canyon, drop box to the left side of clubhouse under overhang</p>																																
<p>WARNING NOTICE: The conduct described above is a violation of your Rental Agreement. If you cure this violation as provided above, Owner/ Agent may choose to terminate your tenancy at the end of the fixed term if there are three or more violations within a 12-month period preceding the end of the fixed term. Correcting the third or subsequent violations is not a defense to termination under ORS 90.427(7).</p>																																
<p>Statement of Account (Informational Purposes Only)</p> <table border="1"> <tbody> <tr> <td>Past Due Rent</td> <td>November 2023</td> <td>\$ 2,000.00</td> </tr> <tr> <td>Late Charges</td> <td>November 2023</td> <td>\$ 200.00</td> </tr> <tr> <td>Other</td> <td>Utilities due November 2023</td> <td>\$ 150.00</td> </tr> <tr> <td>Other</td> <td>November 2023 Pet Rent</td> <td>\$ 35.00</td> </tr> <tr> <td>Other</td> <td></td> <td>\$</td> </tr> <tr> <td>Other</td> <td></td> <td>\$</td> </tr> <tr> <td>Other</td> <td></td> <td>\$</td> </tr> <tr> <td>Other</td> <td></td> <td>\$</td> </tr> <tr> <td colspan="2">Total Outstanding Amount</td> <td>\$ 2,385.00</td> </tr> </tbody> </table>			Past Due Rent	November 2023	\$ 2,000.00	Late Charges	November 2023	\$ 200.00	Other	Utilities due November 2023	\$ 150.00	Other	November 2023 Pet Rent	\$ 35.00	Other		\$	Other		\$	Other		\$	Other		\$	Total Outstanding Amount		\$ 2,385.00	<p>THANK YOU FOR YOUR COOPERATION</p> <p>OWNER/AGENT X</p> <p>ADDRESS 8149 SE Aspen Summit Drive Portland, OR 97266</p> <p>TELEPHONE 503.774.7300</p> <p>EMAIL redtail@cresapts.com</p> <p>SUBSIDIZED RESIDENTS SEE DISCLOSURES</p>		
Past Due Rent	November 2023	\$ 2,000.00																														
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If unable to hand deliver a nonpayment notice, it must be posted to the front door and mailed to the resident.



Delivering the Notice

Improper delivery of a Nonpayment of Rent Notice may result in the court dismissing an eviction. Specific guidelines must be followed:

- **Always** attempt to hand-deliver the notice to an adult named on the notice.
- If unable to hand-deliver the notice, it **must** be posted on the front door of the apartment.
- Mark the box on the bottom of the Nonpayment of Rent Notice form indicating that the copy that is to be posted and the copy that is to be mailed must be checked.
- Write only the apartment number on the envelope, do not write the resident's name.
- Use painter's tape to tape all four corners of the envelope on the front door at a height of approximately 5 feet.
- **Always** mail the notice to the address that is shown on the rental agreement*. It is important that even the zip code is correct. **Note:** *For residents receiving assistance through a local housing authority, a copy of the notice must also be mailed to the housing authority by the site manager.*
- Be certain that the mail is *postmarked* with the same date as the Delivery Date on the notice.
- Mail notices by First Class mail only (not Certified or Registered).

Follow-up after a Nonpayment of Rent Notice has been posted

It is important to follow-up with residents who have received a Nonpayment of Rent Notice. If the resident does not comply, further action must be taken.

- If Rent has not been paid in full by the expiration of the notice, a "Notice to Enter" must be posted on the apartment door. This notice allows you to enter the apartment after a 24-hour period to see if the resident has "skipped" (or 2 days in Washington).
- If the apartment is occupied, proceed with the eviction process.
- If the apartment is vacant and the keys have been returned within the Nonpayment of Rent Notice period (actually 11:59PM 14 days after the notice has been posted), begin calculating monies owed.
- If the resident has paid Rent in full, but still has other unpaid balances, the resident has fulfilled their responsibility according to the Nonpayment of Rent Notice. Balance Due Letters may be used to collect the remaining unpaid moneys.



If you are still uncertain about your calculation, contact your Supervisor or Supervisor before proceeding

Calculating Final Rent—Evictions and Skips

Many factors influence how costs are calculated for a resident who has been issued a Nonpayment of Rent Notice. The requirements of a month-to-month resident may differ from those of a resident with a lease contract. If you have reviewed the Nonpayment of Rent Notice guidelines and are still uncertain about your calculation, contact your Supervisor or Supervisor before proceeding.

OREGON PROPERTIES ONLY:

For Month-to-month Tenancies

If the resident vacates without providing written notice of an intent to terminate:

- Charge resident for 30 days of rent from the day the move-out was discovered. If the apartment is reoccupied prior to the end of the 30-day period, the overlapping days of occupancy must be refunded to the prior resident.

For Fixed Term Tenancies (Leases)

If the resident vacates without providing written notice of an intent to terminate:

- Charge the resident a prorate rent only through the date the move-out was discovered. *Do not charge a 30-days of rent.*
- Charge the resident the early lease termination fee as stated in the lease agreement, typically equal to one and a half times monthly rent plus reimbursement for discounts/specials.

ALL OTHER PROPERTIES (Washington, Idaho, California):

For Month-to-month Tenancies

1. Resident vacates on the 6th (before a Nonpayment of Rent Notice was posted) without providing written notice of an intent to terminate:
 - Charge resident for 30 days of rent from the day the move-out was discovered.
2. Resident vacates on the 9th, after management serves the resident with a Nonpayment of Rent Notice to pay or quit the tenancy:
 - Charge the resident only through the expiration of the Nonpayment of Rent Notice

For Fixed Term Tenancies (Leases)

1. Resident vacates on the 6th (before a Nonpayment of Rent Notice was posted):
 - Charge the resident for 30 days of rent from the day the move-out was discovered.
 - Charge the resident any/all fees which apply under the terms of the early termination procedure stated in the lease (i.e., one month's rent plus all discounts/specials).
 - Charge the resident 1 1/2 times the stated monthly rent under the terms of the early termination procedure.

A FED action takes place when an evicted resident refuses to give up the premises upon expiration of a valid termination notice



2. Resident vacates on the 10th, after management serves the resident with a Nonpayment of Rent Notice to pay or quit the tenancy:
 - Charge the resident only through the expiration of the Nonpayment of Rent Notice. Do not charge a 30-day notice.
 - Charge the resident any/all fees which apply under the terms of the early termination procedure stated in the lease (i.e., one month's rent plus all discounts/specials).

3. Management serves the resident with a Nonpayment of Rent Notice to pay or quit tenancy. The Resident vacates on the 13th of the month (after the Nonpayment of Rent Notice expires):
 - Charge the resident for 30 days of rent from the day the move-out was discovered.
 - Charge the resident any/all fees which apply under the terms of the early termination procedure stated in the lease (i.e., one month's rent plus all discounts/specials).

If the Nonpayment Notice Results in Eviction

A month-to-month resident that is being evicted will be issued a "final date" to vacate the premises by a judge. The resident will be liable for rent through that date.

A resident under a lease contract that is being evicted will be issued a "final date" to vacate the premises by a judge. The resident will be liable for rent through that date *and* a lease buyout fee.

Unlawful Detainer Procedures

An Unlawful Detainer action seeks to transfer legal and actual possession of the apartment from the occupant to the landlord. An Unlawful Detainer Action takes place when a resident refuses to surrender the premises upon expiration of a valid termination notice. A valid termination notice might include: *A 72 Hour Notice; a 30 Day No Cause Notice; a 10 Day Pet Notice;* or other notices including but not limited to a tenant-provided Notice to Vacate.

The Unlawful Detainer Action is initiated by an authorized party filing a complaint form with the court seeking the termination of the tenancy. Upon filing, the court clerk gives a Summons to Appear and present a defense to the process server who in turn serves that Summons upon the resident.

If the resident is personally served with the summons, the court hearing will be held three to seven days later. If personal service is not possible, the hearing will be delayed for several additional days.

The initial Court hearing, in which the Process Server or Attorney is required to appear on behalf of the property is to determine whether the resident contests the eviction action.

If the resident fails to appear in court to offer a defense for why they should not be evicted from the premises, a default order in favor of the landlord will likely be issued.

If the resident appears, the Site Manager and Resident --- in an informal or formal discussion likely to include the landlord's designated attorney, may agree to a move-out date for the resident.

If a move-out date cannot be agreed upon by all parties, a trial date will be set by the court. At that trial, all parties will convey in a courtroom to discuss their various positions and allow the judge to make a determination regarding the landlord's request that the court legally require the tenant to vacate.

If the landlord prevails and the resident does not comply in a timely manner with the court's order to vacate, the Site Manager must take the next steps which involve directing a Sheriff to remove the resident and their possessions. See related policy regarding "Sheriff Lockouts".

Note: Specifics of the process may differ depending on the state in which the eviction takes place.



Site Managers should be prepared to change locks on the date the Sheriff is scheduled to supervise a resident as they vacate.

Filing for Eviction

As a request to file an eviction, the Site Manager will:

1. **Fax or email the expired notice (i.e., Nonpayment of Rent Notice) and a copy of the current rental agreement to the property designated attorney.**

No payment of rent shall be accepted by the Site Management staff after a notice has been forwarded to the Attorneys. Exceptions can *only* be made by the Property Supervisor and must also be documented in writing.

2. The Site Manager emails or faxes the expired notice and a copy of the current rental agreement to the **Central Office** to notify them that an eviction has been initiated.
3. The lawyers will review the notice for accuracy and email a confirmation back to the Manager with instructions for any necessary action.
4. Following any necessary actions, the attorney will file court papers and provide the resident with legal papers requiring the resident to appear before a District Court Judge for the purpose of defending against the landlord's suit to conclude tenancy.

If the resident does provide an "answer" to the eviction notice, **the Site Manager may be asked to provide a summary for the Attorney and the Judge of the events leading up to the eviction from notes in the resident's file and/or Manager Log.**

5. **The Site Manager may be required to meet with the resident outside of the courtroom** prior to seeing the Judge, to possibly come to an agreement on the balance owed and the move out. If the Site Manager and resident do not meet, the Judge will make a decision on the eviction.
6. Upon completion of the eviction process, the property's Attorney will provide an invoice for professional services to the Site Manager. The invoice will include fees for serving the resident with legal papers, preparing court forms, and in some cases appearing in court for the first appearance on behalf of the property and Cambridge Real Estate Services.
7. **Upon receipt of the invoice from the Attorney, the Site Manager will enter the invoice into Yardi.** The amount of the invoice should also be charged directly to the resident.
8. **Once a lock-out date has been received the unit should be marketed for re-rental.**

A formal process such as the Maintenance Log Book protects Cambridge from certain legal liabilities and exposure.



Maintenance Log Book

Proper documentation and accurate record-keeping are essential daily tasks in property management. Appropriate documentation of incoming and completed maintenance requests provides Cambridge with the following:

- Assurance that no request is missed or left incomplete
- Compliance with Fair Housing
- Data on the frequency, type and volume of requests
- An excellent tool for follow-up customer service with residents

A formal process such as this protects Cambridge from certain legal liabilities and exposure, minimizes room for error and consistently tracks activity at each site.

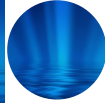
Once you have purchased a red, spiral-bound notebook ([Office Depot](#) Item # 170886), follow these instructions:

- Print and affix the [Maintenance Log Book Instructions](#) to the upper inside of the front cover and they indicate how each page is to be filled out.
- Log each incoming maintenance request by filling in the information in each column. Include common area and exterior maintenance issues as well as resident requests. Essentially any maintenance work is logged in this spiral.
- Be sure to note the date completed and initials of the person completing the request.
- Keep the notebook in a place accessible to all staff—preferably next to the maintenance requests.
- DO NOT remove any pages. This is a document that can be used for court issues, if necessary. Use only pen, not pencil, to write in the notebook.
- As a thoughtful and effective means of resident retention, make sure to follow-up within three days of completion to confirm the job was completed to the resident's satisfaction.

Columns in the Maintenance Log Book are as follows:

Date	Apt #	Resident Name	Request	Date Complete	Maint. Initial	Manager Initial Follow-up
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When the notebook is close to full, purchase another red spiral notebook. Send the completed notebook to the Central Office when it is full. Cambridge will request all outstanding notebooks for each year at year-end and sites will mail these to Cambridge for permanent filing. (This may mean that only partially used notebooks are mailed in.)



It's discriminatory to refuse to consider a request for "reasonable accommodations/modifications"

Reasonable Accommodation Request Verification

As a basic part of Fair Housing law, it's discriminatory to refuse to consider a request for "reasonable accommodations/modifications" made by people with disabilities or handicaps.

A reasonable accommodation/modification is defined as:

- Allowing reasonable accommodations in rules, policies, practices or services if necessary for the disabled person to use the housing. For example: a building with a "no pets" policy must allow a visually impaired resident to keep a guide dog.
- Allowing reasonable modifications to dwelling units or common use areas, at resident's/ applicant's expense, if necessary for the disabled person to use the housing. (Where reasonable, the landlord may permit changes only if applicant/resident agrees to restore the apartment to its original condition upon vacating.)

Note: Properties receiving federal funds are required to pay unless the agency approves resident payment.

Important guidelines to follow when taking a reasonable accommodation request:

- Never ask about the nature or severity of the disability in question. You must also never ask any of the following questions: What caused your disability? What medications do you take? Why do you require that modification?
- Only consider whether or not the request is "reasonable" in terms of cost and alteration of the property. This will be evaluated and considered by the Supervisor.
- Do not attempt to determine whether or not the request is necessary for the individual(s) in question. This is up to the individual and their advisors.

Reasonable Accommodation Request Verification Form:

If a resident or applicant wishes to request a reasonable accommodation/modification, they are required to present their request in writing and can use the Reasonable Accommodation Request Verification (Form CMFH008 on [Tenant Tech](#)). If a resident or applicant provides you with a reasonable accommodation/modification from their verifier directly, forward to your Supervisor and do not require the resident/applicant to fill out the above referenced form. The request allows reviewers to:

- Determine that the individual(s) is qualified under law for a reasonable accommodation/modification and,
- Verify that what is being requested is consistent with the needs associated with the individual(s) and their disability.

All Reasonable Accommodation Requests and associated documents should be sent to your Supervisor for review. Since Reasonable Accommodation/Modification requests can be technical in na-

Know what you can and can't ask when receiving a Reasonable Accommodation Request. Saying the wrong thing could violate Fair Housing Laws



Common reasonable accommodation/modification requests:

- Relocating or creating a Handicap parking space
- Installation of grab bars in the bathroom, often by the toilet or bath tub
- Installation of a wheelchair ramp
- Permission to have a companion or assistance animal
- Changing flooring material in an apartment if the person uses a wheelchair (i.e., removing carpet from an apartment and installing vinyl flooring throughout for easier movement)
- Installation of strobe-light smoke detectors or doorbell for a hearing-impaired individual
- Notification in advance of painting or fumigating due to chemical sensitivities
- Removing interior doors in an apartment for easier access when in a wheelchair

FAQs

What is a reasonable accommodation/modification?

Reasonable accommodations are requests for a change in our policies, procedures, and/or modifications to the rental unit so that the person(s) requesting may have the same equal opportunity to use and enjoy our communities.

Who can request a reasonable accommodation?

Requests for reasonable accommodation can come from residents or applicants for housing or on behalf of residents or applicants, i.e., an applicant may apply with an advocate. We must accept reasonable accommodation requests from credible, third parties familiar enough with the individual's needs as well. Examples include a parent who is familiar with the fact that their adult child has a learning disability. Or, a spouse, who understands, and can document that the resident has been diagnosed with a hearing impairment that they know, renders the residents unable to hear at normal volumes.

Reasonable Accommodations can be requested when:

- 1) An individual qualifies as "disabled" under federal law
- 2) The individual needs the requested accommodation in order to have the same opportunity that a non-disabled individual has to use and enjoy the community.

What defines someone as "disabled" under federal law?

Under Federal Law, an individual is disabled if they have a physical or mental impairment that substantially limits one or more major life activities; has a record of such impairment; or is regarded as having such an impairment.



Our company is an equal opportunity renter. We welcome anyone who completes an application, meets our qualification standards, and wants to live here."

The term physical or mental impairment includes, but is not limited to, such diseases and conditions as orthopedic, visual, speech and hearing impairments, cerebral palsy, autism, epilepsy, muscular dystrophy, multiple sclerosis, cancer, heart disease, diabetes, Human Immunodeficiency Virus Infection, mental retardation, emotional illness, drug addiction and alcoholism.

This definition does not include any individual who is a drug addict and currently using illegal drugs, or an alcoholic who poses a direct threat to property or safety because of alcohol use [24 CFR Part 8.3, and HUD handbook 4350.3, (exhibit 2-2)]

If I have a prospect that requests a reasonable accommodation because of a disability, can I ask them what kind of disability they have?

No. You must never ask someone what kind of disability they have. You must also never ask any of the following questions: What caused your disability? What medications do you take? Why do you require that modification?

I understand that any property built after March 13, 1991 must meet accessibility guidelines, but if my property was built before then, do I have to make the entrance to the office accessible?

If your property was built before March 13, 1991, it is not necessary for you to make the entrance to your office accessible, however, if someone who is handicapped wishes to view an apartment and cannot get into your office, they can call you to meet them at curbside.

When a prospect calls my community for information, can I ask how many adults and children will be residing in the apartment?

No. It is illegal to ask prospective residents about their familial status. Use the following question: "How many people will be residing in your apartment home?"

Can I deny or restrict the children on my property from the use of the facilities or services?

No. It is illegal to deny or restrict the children's use of facilities or services. For example, a rule should not say: "Children may not skateboard on community property". Instead, the rule should be stated as "Skateboarding is prohibited on community property".



Contact your supervisor to understand specifics about your community and who is responsible to pay for modifications.

Is there an occupancy standard that I should follow?

The Fair Housing Act does not establish specific occupancy standards. However, for reasons of public health and safety and to eliminate overcrowding HUD and state laws state that 2 persons plus one, per bedroom is reasonable in most cases. Exceptions may apply, especially for families with young children, therefore, consult with the Supervisor.

If a prospect or resident feels they were discriminated against, what can they do?

If someone feels they were discriminated against, they can file a suit with HUD or State or Local Fair Housing agencies for up to one year from the date of the discrimination act or file a private suit in Federal Court for up to two years from the date of the discriminatory act.

If I have a prospect that asks for information regarding a certain type of person who may or may not live at my community, how should I respond?

Answer this person by saying: "Our company is an equal opportunity renter. We welcome anyone who completes an application, meets our qualification standards, and wants to live here."

Can a prospect who is a current user of illegal drugs claim to have a disability and make a request for a reasonable accommodation to waive our criteria?

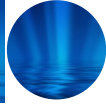
The handicap status of the protected classes does not protect the *current* use of illegal drugs. But, if an individual was a drug user in the past and can prove they attended treatment (or are currently attending treatment), they are considered to have a disability.

If I manage a conventional (or market rate) property and a resident wants a grab bar installed in their bathroom, is the property required to pay for the modification?

If the person is a resident at a conventional property, they are responsible to pay for the cost of the modification. Communities that have received/receive federal funding are obligated to pay for requested modifications. If there is no federal funding involved, the financial responsibility is that of the requesting household. Contact your property supervisor to understand which applies to your community.

If a handicapped resident makes a modification to their apartment, are they required to restore the interior of the apartment to its original condition?

If the modification will interfere with the next resident's use of the apartment, the person is re-



Our company is an equal opportunity renter. We welcome anyone who completes an application, meets our qualification standards, and wants to live here.”

What responsibilities does each staff member have in the reasonable accommodation process?

Every staff member has the responsibility to recognize when an individual is making a request for accommodation and know what their specific role in the process is. Generally, site staff are responsible for facilitating the interactive process by which a resident or applicant requests an accommodation. This can include answering questions, providing an invitation to, but not require, the individual to utilize our reasonable accommodation form, facilitate forwarding related documentation to the central office, and implementing approved accommodation requests. PLEASE NOTE: If the individual requesting an accommodation wishes to use our form, you are instructed to provide the reasonable accommodation form to the person making the request and have them bring it to the third party supplying the information. You are not permitted to send the RA form directly to a person’s third-party health care provider.

Management and Maintenance employees are strictly prohibited from approving or denying any request for reasonable accommodation or modification at the site level. All requests for reasonable accommodation should be forwarded to the designated fair housing officer at Cambridge Real Estate Services and/or the property supervisor for review. All decisions/responses to reasonable accommodation/modification requests are made from the Cambridge Real Estate Services Site Employee Resource Center.

What should a site employee do if the individual making the request is not clearly requesting an accommodation or if their disability is not obvious?

A request for reasonable accommodation may be requested by individuals where there is an obvious connection or “nexus” between the individual’s disability and the request. Such as in the case where someone in a wheelchair requests an access ramp to their apartment. In cases where the disability is obvious, do not require the person making the request to obtain further documentation that they have standing under the law as disabled.

In cases where either the disability is not obvious or the nexus between the disability and request is not clear, employees should contact their property supervisor and/or the designated Fair Housing Officer of Cambridge Real Estate Services to request assistance.

If any staff member is approached by a resident or applicant with a request and believes the individual could potentially be making a request for accommodation, please contact your property supervisor or Fair Housing Officer for guidance and assistance.

If you have any questions about Reasonable Accommodations, please contact your property supervisor.

A Site Manager must always presume that the former resident has some intention of retrieving their belongings.



Abandoned Property

Sometimes, it happens—A resident vacates, usually on a skip or at the conclusion of the Nonpayment notice, and they leave behind an entire apartment's worth of furniture, closets full of clothing, groceries in the cupboards and refrigerator, and their two cats. Here are a few important things to remember when dealing with Abandoned Property:

- A Site Manager must always presume that the former resident has some intention of retrieving their belongings.
- Before removal of any item(s), photographs must be taken and an itemized inventory list of all articles, including model and serial numbers, must be recorded and kept on file.
- The items must be stored, either in a secure location on the property or in the vacated apartment until State specific guidelines regarding abandoned property have been followed and the property can be conclusively presumed abandoned.
- The value of the items must be determined, and an attempt must be made to contact the resident regarding the abandoned property. Value is based on resale or used prices, not on retail prices.
- Under no circumstances can a member of the property's staff retain any of the abandoned property.
- The cost to remove and store any items from the apartment will be charged to the former resident.

The Abandoned Property Notice

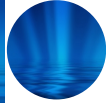
Past residents must be notified of the deadline for retrieving their property by receiving the Abandoned Property Notice (Form M024 on [Tenant Tech](#)). It's good practice to attach a detailed list of all items to the notice.

Delivering the Abandoned Property Notice

- In all States, hand deliver and mail the notice to the former resident allowing 3 days for delivery.
- If the former resident is unavailable to receive hand delivery, it is important to not post the Abandoned Property Notice — just mail.
- Following delivery of the notice, the lock can be changed on the apartment, the belongings can be stored, and the apartment readied for rental. If there are no additional storage facilities on the property, the items should be stored in the apartment. **Note:** In California, possession of the rental unit can only be conveyed one of two ways: (1) By the surrendering of the keys to the unit; or (2) By the receipt of written confirmation from the tenant stating they are out of the premises.
- Perishable items, trash, and pets may be removed from the apartment by calling animal control.
- If the former resident responds to the Abandoned Property Notice, the Site Manager will make the property available for removal by the former resident by appointment at reasonable times.

Note: In Oregon, the date for disposal or sale can be extended 15 additional days on request.

Note: In California, the time to reclaim the abandoned property is 15 days if this notice is served personally or a Sheriff's lockout has taken place (as the Notice to Reclaim Abandoned Property is detailed in the Warning notice the Sheriff must serve at least 5 days prior to completing the lock out. An additional 3 days must be provided if the notice is mailed to the tenant.



In Oregon, an Abandoned Property Notice must be completed by all households containing only one resident.

There are two ways in which a manager can conclude that goods have been permanently abandoned:

1. Resident notifies the Site Manager in writing that they have abandoned the property.
The former resident can provide written notice less than 7 days before moving or any time after moving that they no longer want the possessions. Signing the Unit Condition Report during the move-out inspection does this as well.
2. The Abandoned Property Notice Expires.
If there is no contact from the former resident after the delivery and expiration of the Abandoned Property Notice, the goods may be considered abandoned.

OREGON PROPERTIES ONLY:

An Abandoned Property Notice must be completed upon move-in by all households containing one resident. The Abandoned Property Notice includes a “designated representative” name, phone number and address. This information is also listed on the conventional property Rental Application.

OREGON PROPERTIES ONLY:

Death of Sole Tenant —Delivering the Abandoned Property Notice

In the event of the death of a sole tenant and goods remain:

1. Mail the Abandoned Property Notice first class to the deceased resident at the premises.
2. Mail an additional copy of the notice or personally deliver notice to any known heir, devisee, personal representative or designated person if know to the Landlord.
3. Mail an additional copy of the notice first class to the attention of:

Estate Administrator
Oregon Department of State Lands
775 Summer Street, NE
Suite 100
Salem, OR 97301-1279

4. Follow the standard abandoned property procedures.
5. If neither the heir, devisee, personal representative, nor the Department of State Lands Administrator responds according to the abandoned property time-frame, Landlord shall allow removal of the personal property by the designated person of the resident.
6. The designated person would have to contact the Landlord in that period to show reasonable evidence.
7. The Landlord following these provisions is not liable to another person that has a claim or interest in the personal property.

All abandoned property must be stored for the time periods specified by law. Each State has specific periods



lockout. An additional 3 days must be provided if the notice is mailed to the tenant.

- After the time period of the notice expires, and no contact has been received from the former resident, the property may be sold or disposed of as warranted if the tenant has signed an abandoned property waiver or the estimated value is less than \$1000.

Note: In California, if the property is reasonably estimated to be worth more than \$700.00, the possessions must be auctioned off. If they can be reasonably be estimated to be worth less than \$700.00, they may be disposed of.

Temporary Storage of the Abandoned Property

All abandoned property must be stored for the time periods specified by law. Each State has specific periods:

State of Oregon

- The property must be stored at the location identified in the notice for a period not less than 5 days after personal delivery of an Abandoned Property Notice or 8 days from the date of first-class mailing of the notice.
 - ⇒ The landlord may deduct from the proceeds of the sale of abandoned property, the reasonable or actual cost of notice, storage and sale and unpaid rent. If the tenant after due diligence cannot be found, the landlord shall deposit the remaining proceeds with the treasurer of the county in which the sale occurred. If not claimed within three years, the deposited proceeds revert to the general fund of the county and are available for general purposes.

State of Washington

- The property must be stored at location identified on the notice for a period not less than 7 days from the date of the first-class mailing of the notice if the tenant's property is worth \$250 or less, or 45 days if the property is worth more than \$250. Personal papers, family pictures, and keepsakes must be stored for a period of 45 day no matter the value.
 - ⇒ Following the 7 or 45-day period, the landlord may sell or dispose of property. Any excess income derived from the sale of such property under this section shall be held by the landlord for the benefit of the tenant for a period of one year from the date of sale, and if no claim is made or action commenced by the tenant for the recovery of their property prior to the expiration of that period of time, the balance shall be the property of the landlord, including any interest paid on the income.



Upon notification of a grievance, Management must obtain written and signed documentation from the resident.

State of California

- The property can be removed from the identified location not less than 15 days after personal delivery of an Abandoned Property Notice or not less than 18 days after notice is deposited in the mail.
 - ⇒ If, following the required period, the value of the property has been determined to be worth less than \$700, the property may be kept, sold, or destroyed without further notice. If the abandoned property is believed to be worth more than \$700, the property must be sold at public auction. Once sold, the landlord can deduct costs of storage, advertising of the sale, and conducting the sale from the proceeds.

State of Idaho

Idaho has no statutory framework to deal with abandoned property. Abandonment is a factual determination that must be made by evaluating the circumstances. A strong indication of abandonment exists when rent has not been paid, utilities have reverted back to the landlord's name, an inspection of the apartment unit reveals an unlivable condition, and/or the neighbors have not seen the tenants or heard any activity in the apartment unit for some time. To remain reasonable in our approach to abandoned property, general Oregon guidelines should be used in cases where abandonment has taken place.

- The property can be removed from the identified location not less than 5 days after personal delivery of an Abandoned Property Notice or 8 days from the date of first-class mailing the notice.
 - ⇒ If the belongings have not been claimed following the required period, and the value of the sale of the belongings is expected to be minimal site staff may dispose of the property. If sale of the property is expected to produce a reasonable value, contact your supervisor for further instructions.

Grievance Procedures

To effectively identify the issues and determine appropriate resolutions, documentation of a specific grievance must be provided from the resident in writing.

- Upon notification of a grievance, the Site Manager and/or other appropriate staff must obtain written (English only) and signed documentation from the resident. A copy must be faxed or emailed to the Supervisor.
- The Site Manager must meet with the resident and try to resolve the issue.
- If the issue cannot be resolved, the Supervisor must step in and resolve it.
- Supervisors will work with all parties involved to ascertain the facts and arrive at a decision which will become binding.
- Supervisors shall also review any Fair Housing requests.

The best time to start the discussion about the Move-Out process with your residents is at Move-In during the Resident Orientation.



Billing Residents for Damages

Has there ever been a situation when a resident calls in for a maintenance request for a clogged toilet, only to find a plastic toy clogging the drain? What about the call from the resident that their garbage disposal is broken, and maintenance finds broken glass in it, or even aquarium rocks? What about the time when the staff gets called after-hours regarding an illegally parked car, a domestic disturbance or a loud party?

We highly value our employee's time and expertise and when we find that damage or a disturbance was caused by a resident, family member or guest, it is only fair to bill the resident for the time and materials to make repairs or the time taken to handle other issues.

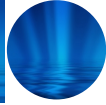
- Upon discovery of a damage or needed replacement in an apartment caused by a resident, or discovery of time spent handling a disturbance or other issue, immediate contact must be made with the resident. Contact can be made via telephone or correspondence. The type of communication and the content of that communication should be documented in the Manager Log.
- The Site Manager will send a Notification of Balance Due (Form M024 on [Tenant Tech](#)) to the resident for the repairs, replacement and time spent by maintenance. In the case of a maintenance repair and replacement, the amount charged to the resident will include time and materials. In the case of any other issue, such as a call for a disturbance, the amount charged to the resident will be for time spent.
- The amount due for the repair, replacement, and/or emergency call is to be charged to the resident's account in Yardi. See page 111 in the [Yardi Voyager Residential Procedures Guide](#) for how to make charges to your resident's account.

Note: Calculating your maintenance technician's time can be tricky. Contact your Supervisor or Property Supervisor for instructions.

The Move-out Process

The Move-Out Process is routine for many managers, but it can be a stressful experience for some residents. Many residents don't understand how charges are assessed and worry that they'll be charged for things they aren't responsible for. Clear communication about the Move-out Process and how charges are assessed can ease residents' anxiety and reduce the number of time consuming Move-out Disputes.

The best time to start the discussion about the Move-Out process with your residents is at Move-In during the [Resident Orientation](#). Review the Wear and Tear provision on the first page of the Lease, Cambridge's carpet replacement policy, and clearly explain the use and importance of the Unit Condition Report. Describe the Move-out Process and what they can expect when they eventually deliver their Notice to Vacate.



The Pre-Move-Out Inspection allows staff time to schedule efficient turnovers and communicate with residents about likely move-out charges

Begin the conversation again when residents deliver their Notice to Vacate. Explain the steps of the move-out process beginning with the Pre-Move-Out inspection, offer the opportunity for residents to remedy repairable issues, describe the Final Move-out Inspection, the carpet inspection by a third-party vendor, how carpet charges are assessed if there is damage, and the carpet replacement policy regarding urine damage. While assessing the condition of the apartment during the Move-out Inspection, explain what charges may be, so Residents aren't surprised when they receive a bill for damages.

The goal is not to retain some, none, or all of the deposit. The goal is simply to utilize security deposits to recover those costs which the landlord is legally entitled to receive. Never settle a security deposit differently based on the size of the security deposit.

Resident's Notice to Vacate

A Resident's Notice to Vacate (Form M014 on [Tenant Tech](#)) should be completed by all adult occupants residing in the apartment. In Oregon, Idaho and California, residents are required to give a 30-day notice to vacate. In Washington, residents are required to give a 20-day notice between the 1st and 10th of the month.

If a written letter of notice is received from a resident (in the rent drop box, for example), the Site Staff should complete a Resident's Notice to Vacate. The Site Staff may have to contact the resident for any information necessary to completely fill out the form and have the resident sign.

Always check the desired move-out date against the resident's actual lease to determine if proper notice has indeed been given. Don't assume it has. If the resident's lease is not due to expire, remember to review the lease buy-out provision, and contact the resident.

Sometimes a move-out occurs as a result of the death of the sole occupant. When this occurs, it is company policy to waive the thirty day notice requirement, and to instead engage with the deceased individual's named "Emergency Contact" to coordinate the smooth and orderly conclusion of the tenancy including the removal of all personal property, and the completion of a move-out settlement statement to be mailed to the "Estate of (Deceased Resident's Name)". The date the death is communicated to Cambridge should be documented as the "Notice Date". The actual date of Move-Out should be the date the final personal possessions are removed from the dwelling and possession is transferred back to Property Management. Generally, management reserves the right to charge the daily rent between the date of death and the date possession is returned to management. Again, generally, lease buy-out fees or early termination fees are waived in the event of the death of the only adult occupant residing in the apartment.

The Pre-Move-Out Inspection

- ✓ Allows Staff Advance Time To Schedule Turnovers Efficiently
- ✓ Allows management to communicate with residents about likely move-out charges

Once a Notice to Vacate is received:

- Schedule a Pre-Move-Out Inspection At Least Two Weeks Before Move-Out
- Use the Apartment Turnover Checklist (Form C038 in [Tenant Tech](#)) for documentation

Move-out charges will differ based on whether residents have lived in their apartments for greater than or less than 18 months.



- Determine Likely Replacement and/or Repair needs
- Note unusual wear and tear.
- Use the Itemized Statement Following Initial Pre-Vacating Inspection (Form C396 in [Tenant Tech](#)) to calculate projected move-out charges.
- Discuss the Itemized Statement with the resident; Encourage them to remedy conditions to avoid charges
- Remind the resident that a Pre-Move-Out Inspection is Just A First Step; All Final Decisions Regarding Costs are Made at Move-Out
- Schedule vendors and order materials based on the pre-move-out inspection.
- Schedule the final move-out inspection for the Move-Out Date

The Move-Out Inspection

On the resident's move-out date, if possible, inspect the apartment with the resident:

- To determine if the unit has damage beyond normal wear and tear
- The Site Manager and resident should reach an agreement as to the extent of any damage and the cost for repairs or replacements.
- Document the condition of the apartment upon move-out using the original Unit Condition Report the resident filled out at move-in
- Document damages and reasons for charges using a digital camera, including a half sheet of paper with the Resident surname, current date, and apartment number in each photo.
- The resident and Site Manager must sign and date the bottom of the Unit Condition Report
- A copy of the completed form should be given to the resident.

If the resident is not present at the time of the move-out, the inspection should be completed using the same Unit Condition Report. In the Resident signature line, mark "resident not present".

Maintain a digital file folder for each move-out containing all of the photographs taken during the move-out inspection. Should the move-out charges be disputed, photographs and other documentation like third-party carpet inspection reports, the Unit Condition Report, and carpet samples provide proof of damages.

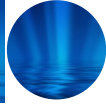
Assessing Move-out Charges

Move out charges differ according to how long a resident has lived in their apartment. A distinction is made between residents whose tenancies are less than and greater than 18 months. The condition of the apartment combined with the length of tenancy will determine what charges the vacating resident is responsible for upon move out.

If a carpet inspection determines that the carpet has been damaged by urine, a section of the damage carpet should be removed, labeled and stored in a plastic bag for a period of 6 months.

Following the assessment of move-out charges, the Move-out Condition Report, a four part carbon copy form (Order using the B&B Print Source Order found on [Tenant Tech](#) Form #C000) needs to be completed prior to processing the move-out in Yardi.

See the following page for instructions on how to assess charges in detail.



Every apartment should be cleaned prior to the next occupancy. Residents should be charged for cleaning in excess of standard 'sanitizing'.

Painting

Less than 18 Months:

The vacating resident should be charged for all painting — even touch-ups (normal wear and tear excluded) — as the lease agreement generally states that painting during the first 18 months of residency is defined as 'unusual'.

More than 18 Months:

Residents of more than 18 months are generally not responsible for routine interior painting. Even these long-term residents may, however, still be held responsible for unusual interior painting due to damage. Unusual interior painting might include seldom painted surfaces such as ceilings, cabinetry, doors and trim. It may also include the cost of a second coat to cover damages that cannot be covered by a routine single coat.

To determine responsibility for the costs associated with painting seldom painted surfaces, managers must make an informed decision regarding the circumstances which result in the need to paint. If the need is a result of resident abuse or neglect, the vacating resident should be held accountable for painting. For example, damages beyond normal wear and tear such as smoke damage requiring sealing, painted walls requiring multiple coats to cover, or other damages to the wall requiring extra coats to cover could be charged to the resident.



Cleaning

Any Length of Tenancy

Our standard lease agreement states that residents are responsible for all cleaning. Regardless of the term of tenancy, vacating residents should leave their apartment reasonably clean at the time of move-out.

Every apartment should be properly cleaned prior to the next occupant. This is a cost incurred by management and not the resident, and is estimated at approximately 3 hours worth of cleaning. Residents should only be assessed for cleaning that is required to restore the unit to its prior move in condition, in excess of the cost to sanitize.

In circumstances where an apartment has been left exceptionally dirty, managers have the discretion to use the non-standard cleaning section of the Move-Out Inspection Worksheet. In all cases, if the Non-Standard Cleaning section is used to assess additional charges, significant,

Unless you can be certain that the carpet in the vacated unit is unaffected by any potential damage, it may be necessary to have the carpet inspected by a third-party vendor



compelling file documentation — including photos, detailed apartment layouts, and specific written comments, must accompany the move-out paperwork.

If adequate documentation is not received, the vacating resident cannot be billed for these additional cleaning charges.

Carpets

Some types of carpet damage are obvious—stains, tears, and soiling for example. Other types of damage can be more difficult to diagnose—delamination, fiber wear, and urine damage. Unless you can be certain that the carpet in the vacated unit is unaffected by any potential damage, it may be necessary to have the carpet inspected by a third-party vendor, typically a carpet shampoo vendor. If any damage is found or suspected a carpet inspection must be scheduled.

A carpet inspection by a third-party vendor will determine what damage has been done to the carpet and make a recommendation for either repair or replacement, as well as a number of other important factors which will determine whether charges are assessed to the resident. See Carpet Inspection for more detailed information about the elements and requirements for carpet inspections.

Removal and Replacement

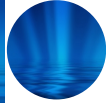
If the carpet inspection report completed by a third-party vendor indicates unreparable damage and recommends removal and replacement of the carpet, the carpet inspection should be forwarded to your supervisor and info@cambridgeres.com at the central office. A Recommendation will be returned indicating the percentage of the carpet replacement cost that should be charged to the resident.

The Recommendation will also indicate if the resident is charged for the third-party carpet inspection.

Carpet inspection reports must indicate the percentage of life remaining in the carpet. Cambridge policy adds a 15% buffer to the percentage to account for potential discrepancy in the evaluation of wear and tear. For example, if a carpet is determined to have 40% life remaining in the carpet, the resident would be charged 45% of the cost of replacement.

Subfloor Sealing

The carpet inspection may also recommend that the subfloor be sealed in cases where urine damage has penetrated the carpet and pad and damaged the underlayment. The Recommendation from SERC will also indicate if the subfloor sealing should be charged to the resident. Charge the former resident \$50 per room for every room where sub-floor sealing is required. If there is a hallway in the apartment, consider the hallway one room.



Carpets that are not replaced are required to be cleaned prior to the new resident occupying the unit.

Repairable Damage

If damage to the carpet is repairable and beyond normal wear and tear, the resident should be charged for the cost of repairs.

Less than 18 Months-No Damage Found

Carpets that are not replaced are required to be cleaned prior to the new resident occupying the unit. The vacating resident is charged for the carpet shampoo as such an assessment is provided for in the lease agreement. If an inspection is completed but no damage is found, the vacating resident is not charged for the inspection.

Residency of more than 18 Months—No Damage Found

According to the lease agreement, the landlord reasonably expects to shampoo carpets following a tenancy of 18 months or longer. Therefore, aside from damage considerations (see above), there should be no charge for carpet cleaning (and other routine restoration charges) for tenancies of 18 months or longer.

OREGON PROPERTIES ONLY:

The Landlord may deduct the cost of carpet cleaning from the deposit regardless of whether the residents clean the carpet before delivering possession and regardless of the length of occupancy.

Window Blinds

If the blinds need a wipe down, the vacating resident should not be charged unless their tenancy was for less than 18 months. For tenancies longer than 18 months, wipe down of window blinds is considered normal wear and tear and not eligible for billing to the former resident.

If more thorough cleaning is required — typically cleaning which requires either the removal of the blind from the mounting brackets or the aggressive use of cleaning chemicals and equipment— this is considered a ‘wash’ on the Move-Out Inspection Worksheet. Regardless of the term of tenancy, vacating residents should be charged any time the condition requires an aggressive cleaning utilizing unusual techniques or chemicals. Charge vacating residents of more than 18 months the difference between a wipe down and a wash as listed on the Move-Out Inspection Worksheet.



Charge for keys, gate cards, pool passes, garage door openers, etc. that are not returned



The Move-out Condition Worksheet

The Move-out Condition Worksheet can be ordered from B&B Print Source using the Order Form found on [Tenant Tech](#) (Form #C000).

- Use original ink only on the white copy of the Move-Out Inspection Worksheet. If you make a mistake start over. Original ink is an important audit control measure which allows confirmation that painters and cleaners are not charging excess fees.
- Attach the yellow sheet to the painting contractor's invoice and the gold (dark yellow) sheet to the cleaning contractor's invoice. File the pink copy in the unit maintenance file.
- Always charge the vacating resident for excessive/unusual cleaning and painting as these are regarded as 'unusual' wear and tear.
- Charge for keys, gate cards, pool passes, garage door openers, etc. that are not returned.
- You don't have to wait for vendor invoices to process a move-out in Yardi. Use the amounts listed on the Move-Out Inspection Worksheet and on Cambridge's schedule of standard turnover costs. If there is a considerable discrepancy between the invoice charges and what the former resident was charged, generate a revised move-out statement and forward it to the Central Office for follow-up processing.

Processing the Move-out Statement

Deadlines

Law requires security deposits to be refunded, and/or notification of itemized damages, to residents within certain time limits defined by each State. Failure to notify residents of itemized damages or refunding of the deposit within the specified time frame can lead to double that amount being refunded to the resident.

To ensure all State requirements are met, it is important to complete the Move-out Statement—

- **within 10 calendar days of a move-out in Oregon, California and Idaho**
- **within 5 calendar days of a move-out in Washington.**

These deadlines are consistent with Cambridge's requirement to complete a move-out settlement within 30 days in Oregon and Idaho, within 21 days in California and within 14 days in Washington, to avoid costly financial penalties assessed to the property.

There are generally no penalties if a Revised Move-out Statement is sent to the resident after the legal time frame expires, as long as the original Move-out Statement was sent within the legal timeframe.

Using the completed Move-Out Inspection Worksheet (ordered using the B&B Print Source Order Form on [Tenant Tech](#)—Form C000) complete the move-out process in Yardi—see page 84 in the

If you're having difficulty meeting Move-Out Statement deadlines, contact your Supervisor for guidance and assistance.



For other damages, Managers should use recent invoices for work done in identical floorplans to maintain a list of costs for:

- Carpet shampooing
- Carpet inspection
- Sub-floor Sealing
- Extermination
- Key Replacement
- Goods Removal
- FED Costs
- Carpet replacement
- Vinyl Replacement
- all other repair and replacement costs per unit type.

Tips for maintaining an accurate list:

- Maintain lists by floorplan. Costs can vary significantly from one floorplan to another.
- Costs change over time, so be sure to update costs as they change.
- If there is a significant difference between your expected cost and an invoice you receive from a vendor, review the invoice thoroughly and consider contacting the vendor to discuss the reasons for the difference.
- Costs for replacement of Maintenance related repairs can be found on HD Supply. Discuss the needed replacement items with your Maintenance Personnel to ensure an accurate assessment of the cost of repairs.
- If there aren't any recent invoices for identical floorplans, your vendor should be able to provide an accurate estimate for the scheduled work. If the work is abnormal, or extensive, consider scheduling an appointment with the vendor who will be doing the work to give you an accurate estimate.

Completing a Pre-Move-Out inspection at least two weeks prior to the resident's scheduled move-out date allows time for assessing this type of work, scheduling any necessary inspections for estimates, and obtaining those estimates prior to the deadline for delivering the Move-out Statement.

If you're having difficulty meeting deadlines for completion of the Move-Out Statement, contact your Supervisor for further guidance.



If the Move-Out Statement is returned as non-deliverable, attempt to obtain the correct address. If you're unable to, forward the envelope to SERC.

Mailing the Move-out Statement

Once the move-out process and the Move-out Statement have been completed, the next step is to forward the completed paperwork to SERC and to create a site file.

Use the following instructions, also printed on the front of The Move-Out Envelope (ordered using the B&B Print Source Order Form on [Tenant Tech](#)—Form C000), to mail the completed move-out packet and Move-out Statement.



A. **If a refund is *not* due** to the outgoing resident(s), the Site will mail the Resident copy of the Move-out Statement directly to the resident in a windowed envelope ([Office Depot](#) Item# 679428). Fold the Move-Out Statement so the address appears in the window, or you can use a plain white envelope and use a mailing label. (Note on the *Move-Out Envelope* the date the Move-Out Statement was mailed and initial.)

For California Properties only:

When a “No Refund Move-Out Statement” is mailed to the outgoing resident, it is important to include copies of all invoices for charges exceeding \$125. The Site Manager will initial to verify. If the invoices are not available at the time the Move-Out Statement is processed, the Site Manager will forward to the resident upon receipt.

B. **If a refund *is* due** to the outgoing resident(s), do *not* mail the Resident copy of the Move-Out Statement to the resident. All copies of the Move-Out Statement are placed in the Move-Out Envelope and the Central Office will mail the Move-Out Statement along with the refund check (and invoice copies for California move-outs) directly to the resident. Include invoices for charges exceeding \$125, just as you would when a refund is not due.

Each Move-Out Statement that is processed is placed in a *Move-Out Envelope*. (One Resident Household per envelope.)

On the Move-Out Envelope, complete the name of all occupants, the move-out date, the Site Name and the Apartment #. It is important to write the name(s) legibly.

Check off all paperwork included in the Move-Out Envelope under the area titled: Paperwork Should be Submitted in the Order Listed Below. A Comment area is also included on the envelope to provide additional information.

Note: It is important that you do not seal the envelope. Fold the flap in.

Multiple Move-Out Envelopes can be placed and mailed in a larger envelope (approximately 10” x13”, [Office Depot](#) Item# 331064).

If the Move-Out Statement is returned as non-deliverable, attempt to obtain the correct address. If you're unable to, forward the envelope to SERC.



Mailing a Revised Move-out Statement

When an Revised Move-Out Statement is processed, and **the resident still has a balance owing**, the Site Manager will mail the Resident a copy of the Move-Out Statement directly to the resident. A copy of the Move-out Statement should also be emailed or faxed to your property accountant to alert them to the revision. File a copy of the Revised Move-out Statement in the resident's move-out file.

If after revising the Move-Out Statement **the resident will receive a refund**, do not mail the Resident a copy of the Move-Out Statement. Email or fax a copy of the Move-out Statement to your property's accountant and let them know that the resident is owed a refund. File a copy of the Revised Move-out Statement in the resident's move-out file.

Non-Deliverable Move-out Statement

If a Move-Out Statement is returned to the site office as non-deliverable, you should attempt to find out the correct address. If you obtain the correct address, resend the Move-Out Statement to the resident. If you are unable to obtain a correct address, state on the front of the envelope that you were not able to obtain a new address and then forward the envelope to the Central Office with your weekly mail.

In the site move-out file, document the date the Move-Out Statement was returned non-deliverable, that you attempted to obtain an accurate address, the date you mailed the Move-Out Statement to the correct address (if applicable) and note the date you mailed the returned envelope to Central Office. (You can make a copy of the returned envelope and document the information on the copy.)





Check the Early Lease Termination Fee clause in your lease to see if it includes charging for repayment of rent specials, rent discounts, and move-in incentives.

Charging an Early Lease Termination Fee

The details of the Early Lease Termination Fee are located in the “Charge Information” section of the Rental Agreement on the first page above prorate accounting. The Early Lease Termination Fee should be reviewed with the resident at move-in during the [Resident Orientation](#), and again at the time Notice to Vacate is received, if move-out date occurs during the lease period.

If the resident gives the legally required notice for your state, charge the amount indicated in the Early Lease Termination clause on the lease at the time Notice is given.

See the example below.

Early Lease Termination Fee Example including repayment of specials, discounts and incentives:

- Resident occupies their apartment on February 14th and agrees to a six-month lease.
- Market Rent is \$1200.
- The lease term expires on August 31st.
- If the resident gives notice to vacate on May 1st, they will vacate on May 31st with no further rent obligations. The cost of their lease buy-out is:

Early Termination Fee	\$1800
Total Lease Buy Out	\$1800

Move-Out Disputes

If the former resident disagrees with the charges listed on the Move-Out Statement, they are required to respond in writing to the Site Office.

After the site manager receives the dispute letter, they need to gather the necessary documentation (i.e. copies of receipts, photos or file notes), prepare a draft response to the former resident, and forward all information to their Property Supervisor for review.

After the documents are reviewed, the site manager and property supervisor will coordinate the mailing of the final, approved response to the former resident.

Knowing the financial health of your property is key to knowing the right time to adjust turnover practices.

Managing Property

Property Management is, in part, about maintaining and creating value in the asset you manage—your property. Value is tied to a number of aspects of your property, like rental rates and occupancy, but it's also tied to the condition of the physical property. Creating value at your property requires:

- Developing and maintaining a rigorous and routine maintenance program
- Adherence to the biannual Preventative Maintenance Inspection Program
- An awareness of the condition of your buildings and units inside and out

Vendors can be a great resource for understating the overall condition of your property. Talk to your landscaper, the roof technician or plumber about the causes of the issues they're there to fix. Ask them if there are measures that can be taken to prevent similar issues in the future. Utilize their expertise to understand the condition of elements at your property. What they tell you should be taken with a grain of salt—they may be motivated by a desire to sell you their services. If you suspect that's the case, second and third opinions can always be sourced. If you expect that a major repair will be required in the future, contact your Property Supervisor so planning and budgeting can begin.

The Budget

Marketing effectively, filling vacancies, maintaining competitive rents, and collecting balances owed are all important aspects of meeting budgetary expectations. They are also all related to maximizing income. It's a full steam ahead—the more energy and effort you put into it, the better outcome you're likely to have.

When it comes to maintaining a healthy, safe, and well-tended property the emphasis shifts from full steam ahead to a balancing act between cost and need. Perhaps your property would look better with all new siding and windows. Throw in a seal coat for the parking lot and all new landscaping. While we're at it lets upgrade units too, with granite countertops, all new flooring and appliances. It all sounds great, but it's also extraordinarily expensive and your property isn't likely to realize the gains for years.

Decisions about major capital improvements like those are made by owners after months and sometimes years of careful consideration of numerous factors.

A Property Manager's decisions don't come with the same kind of price tag, but they occur nearly every day and by year end can have a major impact on the bottom line at your property. Be smart about how you spend money.

Visiting competitors properties can give you valuable information, including new ideas for creating value in your apartments.



Carpet and Vinyl Replacement Process

The pre-move-out inspection:

When completing a pre-move-out inspection or a final move-out inspection, Site Managers will oftentimes conclude that the carpet is marginal, and that replacement carpet should be considered. When this occurs, Site Managers should do the following:

1. Notify the outgoing residents that the condition of the carpet is such that replacement may be required.
2. Contact your property's local carpet shampoo vendor and schedule an inspection, requesting that they issue a report describing the condition of the carpet.
3. Submit the carpet vendor's written carpet assessment via fax or email to your Property Supervisor for review. *Do not schedule carpet installation until you receive approval.*

The purpose of the third-party inspection:

The purpose of the third-party inspection is to avoid the potential that a former resident can claim the manager or owner replaced the carpet simply to enhance their ability to rent the apartment. We use the services of a carpet restoration vendor (instead of a carpet supplier) because the restoration vendor, if anything, is predisposed to restoring the carpet and knows full well that they won't make any money if they pronounce the carpet 'beyond restoration'.



The carpet inspection fee:

Cambridge allows a fee for a carpet inspection. The cost of the inspection will be billed to the former resident only if damage is determined to be the responsibility of the resident, and is beyond normal wear and tear. If it's concluded the damage was related to normal wear and tear, we will consider the inspection charge an operating cost for the property.

Note: It's a good practice to have a third-party inspection of a carpet when any pet has resided in the apartment. Even if no evidence of urine damage is found, the inspection report documents the condition of the carpet prior to the next resident's occupancy, providing proof that the carpet was urine free at the time of their move-in.

Do not replace carpets without both a prior written report from a carpet restoration vendor and written authorization from Cambridge.

The Carpet Inspection Report

Carpet Inspections **must** include the following information. Be sure to communicate this to your carpet vendor, especially if they are not familiar with Cambridge requirements. Provide floor plans for your Carpet Inspection Vendor to get the most accurate documentation of damages. This can be invaluable in court if the carpet charges are disputed. If you don't have floor plans handy, you can always find downloadable PDF versions on your property's website.

- ✓ A diagram of the apartment interior with notations regarding the location of stains, tears, burns, urine and any other defects.
- ✓ An estimate of the approximate percentage of wear.
- ✓ A description of the type of carpet in the apartment (i.e., material, color, areas carpeted, etc.).
- ✓ A specific estimate for restoration of existing carpet or a recommendation to replace with new.

Receiving the approval to replace:

Typically, within one business day of sending the carpet inspection report to info@cambridgeres.com and your Property Supervisor, you can expect to receive back authorization for:

- Carpet Replacement – Yes or No
- The percentage of the replacement cost to be charged to the resident
- Whether to charge the resident the cost of the inspection
- Whether or not to seal the subfloors and charge the resident the cost of subfloor sealing.

If the carpet is replaced, remove a small sample (2 ft. x 2 ft.) of the damaged area of the carpet, label with the resident's name, apartment number, and the move-out date and seal in a plastic bag for a period of no less than six months following the date of the Move-out Statement. If there should be a dispute regarding the charges associated with the carpet replacement, the sample would be used as proof of damage in court.

What do you do with the documentation of the inspection?

File a copy of the Carpet Inspection, Carpet Inspection Invoice, Replacement Approval and the Carpet Replacement Invoice in the Move-out file for the resident, and the unit's Maintenance file.

If there should be a dispute regarding the charges associated with the carpet replacement, documentation of the condition and cost of replacement would be used as evidence for the charges assessed to the resident.

Note: Do not replace carpets, regardless of the circumstances, without both a prior written report from a carpet restoration vendor and written authorization from Cambridge. This policy should be followed without exception.

It's a good practice to have a third-party inspection of a carpet when any pet has resided in the apartment.



Vinyl Replacement

When completing a pre-move-out inspection or a final move-out inspection, Site Managers will oftentimes conclude that a vinyl floor is marginal, and that replacement vinyl should be considered.

Evaluating Damage

The following are the most common types of damage found in a vinyl floor:

- scratches
- indentations
- tears
- discolored areas
- burn marks

Some damage to vinyl can be repaired. Consider contacting your flooring installer or a flooring repair vendor and having them inspect the floor and give you their recommendation. Your maintenance technician can also provide a second opinion if you're unsure whether damage requires replacement.

Charging the Outgoing Resident

There are a few factors that determine if a resident is responsible for replacement.

- **Was the damage present at move-in** – consult the unit condition report and any other documentation of the condition of the apartment at move-in (like photos taken prior to move-in or after the move-out of the previous resident).
- **How old is vinyl being replaced?** – The invoice for the vinyl installation can likely be found either in the maintenance file for the unit, or by searching in Yardi for the invoice. If you can't find it, consider contacting your property's accountant.

The Resident **should** be charged a percentage of the cost of replacement if the vinyl was damaged during the resident's occupancy **and** the damage is not due to normal wear and tear.

The Resident **should not** be charged if the damage existed prior to the resident moving in and/or the vinyl is being replaced due to condition related to age.

File a copy of the invoice for the vinyl replacement in the resident's Move-out File, and in the unit's Maintenance File.

Competitive bidding is a good way of making certain your property is getting maximum value in each spending situation.

Capital Improvement Projects

A Capital Improvement is a permanent structural change or the restoration of some aspect of a property that will either enhance the property's overall value, increase its useful life or adapt it to new uses. Capital Improvements are investments in your property's future. They should have a positive impact on your property's performance by helping to stabilize occupancy, increase rental rates, and have a positive impact on your property's position in the rental market.

Capital Improvements generally require time to plan, budget and implement, and not every idea is going to be a viable fit for your property. As a Site Manager, you are uniquely acquainted with the condition and needs of your community. If you believe your property is ready for a capital improvement, contact your Supervisor to discuss the idea.

Do you know what kind of improvements your competitors are making?

Taking a few extra minutes to drive by or through your competition's properties will give you a good idea of the exterior improvements underway, but it's also important to know what's being done on the inside. A great way to get information is through your prospects. Ask them where else they've toured and what they liked and disliked about a competitor's property. Better yet, visit your competitors and "shop" the competition on a regular basis.

If you find your competitors are doing something new, let your Property Supervisor know.

Competitive Bidding for Capital Improvement Projects

Competitive bidding is a good way of making certain your property is getting maximum value in each spending situation.

Developing a Scope of Work

The first step of the process is to establish the scope of work for the project. A scope of work defines the parameters of the job at hand. For example, your property is scheduled to have asphalt repairs, seal-coating and re-striping. You would need to know which areas need repair, how many coats of seal-coating are required and how many parking spaces will require striping.

In order to know if we are getting good value out of what we're bidding, we need to be able to compare each bid "Apples to Apples".

If you're uncertain about the scope of work, consider contacting your Supervisor or Supervisor for help in defining the work required. SERC has spec sheets for properties to use like asphalt improvements, exterior paint, etc. that can help define the scope of work at your property and ensure you're receiving "apples to apples".

Review your bids carefully. Are they complete? Is all of the required work listed on the proposals?



Obtaining Competitive Bids

The next step is to select the contractors you'll be requesting bids from. If at all possible, use contractors on Cambridge's current approved vendor list. If you are having difficulty finding the right contractor for the job or have a project requiring vendors new to you or to Cambridge, check with your Supervisor or your Supervisor for additional assistance.

Once you've selected the contractors, provide them with the scope of work for the project. Be specific and consistent in your request to each contractor.

Generally, Site Managers are required to obtain a minimum of three bids.

It's important that each bid you receive is kept confidential and is not shared with other bidders. Our objective is to find the best value for the scope of work provided, not identify the most effective bidder. For example:

The Manager at the Exceptional Apartments receives the first of its three bids for a property seal coat at \$15,000 from ACME Asphalt Company. A second and third contractor that were both shown ACME's original bid and later submit proposals for \$13,500 and \$14,500. While seemingly better values than ACME, the reality is that all three bids were far too high given the scope of work requested, should have brought in bids closer to the \$10,000 mark.

Having each contractor provide an independent bid can help with comparison of costs for each item in the proposal and in determining which bid is the best value for the property.

Review your bids carefully. Are they complete? Is all of the required work listed on the proposals? Is there work identified on the bid that wasn't in your scope of work?

If one proposal shows a different scope of work, find out why. Contractors sometimes have different solutions to the same problem. Discussing the different approach with a vendor helps you and your Supervisor better understand their bid, and ultimately helps in making the best decision for your property.

The Final Step

After thoroughly reviewing the proposals, submit the proposals in a single submittal to your Property Supervisor. Include notes on any differences in the bids and any information about the project you learned through your discussions with the bidding contractors.

Be prepared to wait 30-45 days after you submit bids for final approval to proceed. Cambridge is often required to submit bids to the property owner for their feedback and decision. This process can take considerable time.

If you aren't sure which items require USDA approval, check page 5 of the RD budget or contact your Supervisor or Supervisor.

Replacement Reserve Requests— USDA Rural Development Communities

During the year, it may become necessary to replace items that are beyond their useful life at your community. USDA Communities must request approval for use of their replacement reserves (savings account) to pay for non-recurring replacement items. The key to successfully utilizing reserves is that management must receive the signed and approved request from the agency *prior* to the item/work being completed. As such, the timing for when site staff request reserves is critical to ensuring smooth operations at your community.

Replacements can include but are not limited to:

<u>Major Replacements</u>		<u>Routine Replacements</u>
Roofs	Windows	Appliances
Parking Lots	Exterior Paint	Flooring
Pools	Siding	Cabinets

If your property needs to replace certain higher cost items and utilize replacement reserves, follow the steps outlined below:

1. Collect information on why the replacement is needed and a quote/estimate for the cost of replacement. Including but not limited to: page 5 of the RD Budget, Third party inspections, photos showing condition, appliance “death certificates”
 - **Check Your Budget.** - Page 5 of the RD Budget shows the budgeted items for the year that are anticipated to be paid for by either the operating or reserve account.
 - **Cost over \$5,000?** - If replacement cost for a single item exceeds \$5000, a second quote/estimate is required to be included with the request for comparison. See Obtaining Competitive Bids for more information.
 - **Identify the Scope of Work.** - Whenever possible, utilize one of Cambridge’s published [Specification sheets](#). Provide to all bidding parties to help ensure the bids you receive are “apples to apples”

2. Send this information to the SERC contact for replacement reserves. The SERC contact will submit the formal request to the agency representative for your community.
 - **Cover Sheet** - Utilize the Reserve Request Cover Sheet Form available through the [Tenant Tech](#) Forms program (Form C343)
 - **Plan Ahead.** - Understand exactly when you need that item completed and work backwards. The timeline for gathering information and submitting for use of reserves needs to be completed and submitted such that you receive the signed approval from the agency **before** the item is installed or work completed at your community.

Communication with Residents and your Pest Control Company is the key to successfully combating pests.



Property Management

3. The agency's policy is to respond to any request for reserves within 5 business days of receiving the request.
 - **Follow up** - If after 5 business days the site has not received the agency's response, Managers should follow up with SERC.
 - **Avoid Delays** - To avoid delays for life/safety or habitability related replacement requests (i.e. hot water heater, fridge, & A/C), site staff should keep an inventory of those items on hand (typically one of each). This helps in cases where management does not have time to wait for the agency's approval of the replacement.
4. Once management receives the signed reserve request, the request work can proceed on site as soon as the same day, but at no time before approval is received.
 - **Job Finished?** - Site staff are to attach a copy of the Approved Request for Reserves to the invoice from the vendor, and to include it with the next weekly invoice batch to SERC.
 - **Questions?** - In situations where stocking emergency replacement items is not viable, consult with your property supervisor to understand how your community should proceed.

Pest Control

Most properties will deal with a pest invasion at one time or another. They can come in several varieties. Each type of pest presents a different challenge. The key to solving your pest situation is having a first-class pest control company to help remedy the issue along with detailed communication with your residents.

The keys to successful and cost-effective pest control:

- Find a **first-rate pest control company** in your area. If you don't already have one, try calling your Supervisor, Supervisor or neighboring communities for their recommendations.
- Many pest control companies will provide you with directions for **preparation for treatment** for various critters, especially Bed Bugs which require the most preparation by residents to have a successful treatment. Discuss the needed preparations thoroughly with your pest control provider so you can describe to residents in detail what they need to do.
- Communicating the need for **reporting pests early and how to prevent pests** is best done at move-in during the Resident Orientation. Let residents know how important it is to let management know about a potential infestation immediately. The sooner a problem is caught the more successful and less expensive the treatment will be, and that, depending on the situation, those extra costs could be passed on to them. Pest prevention equals good housekeeping. The fewer dark corners and crumbs on the ground the fewer opportunities pests have to feed and multiply.

Common Types of Infestations:

Fleas – Animals are normally the source for a flea infestation. Fleas can often be eliminated in one treatment, but affected animals need to be treated at the same time to prevent fleas from

Property Management

If you're uncertain about whether charging a resident for treatment is appropriate, contact your Supervisor or Supervisor for advice.

returning. While we will happily coordinate treatment of the apartment, it's the Resident's responsibility to treat their animals.

Cockroaches – Cockroaches often hitch rides on used furniture and multiply quickly. Unreported roach infestations can quickly spread to neighboring apartments and can take multiple treatments to remedy. Early reporting of cockroaches is vital.

Rodents (mice and rats) – Rodents are attracted by food, water and warmth. Good housekeeping practices will help keep rodents at bay. Sealing access points to the building will help keep them outside.

Bed bugs – Like cockroaches, bed bugs hitch rides and can easily be picked up in hotel rooms, in suitcases, and even on your clothes. Bed bugs can be difficult to kill and can also spread to nearby apartments. Early reporting is vital to containing the infestation and resident compliance with instructions is necessary for successful treatments.

When to Charge Residents for Treatment:

Charging residents for an infestation can be a difficult decision. It's primarily based on:

- When the infestation was reported
- If adjacent units were affected
- In cases where multiple units were involved, if the source unit can be identified
- If the infestation was due to a housekeeping issue or pets
- If incomplete preparations by residents created the need for multiple treatments or rescheduling of treatments.

If you're uncertain about whether charging a resident for treatment is appropriate, contact your Supervisor or Supervisor for advice.



Maintenance

Take time to educate new residents on the proper use of systems to minimize damage or misuse and reduce the number of maintenance requests.

Maintenance

A well-run office and superb customer service goes a long way in meeting resident expectations, but the job isn't complete without timely and effective maintenance. It's likely that many residents will interact with maintenance personnel more often than they will with office staff.

Ensuring that the maintenance program at your property runs smoothly and efficiently will help your maintenance staff meet resident expectations, complete work orders on time, complete unit turns on time, and conduct bi-annual Preventative Maintenance Inspections keeping your property in tip-top shape year-round.

Communication plays an important role in the success of your maintenance program.

- **Work Orders**—when taking a work order, ask follow-up questions about the maintenance issue in the resident's apartment. The more information you can provide to your maintenance tech, the more prepared they'll be when they arrive at the resident's door.
- **Priorities**—Priorities can shift quickly in cases of emergencies. Make sure everyone on your staff is comfortable communicating, and understands the need and reasons why it's sometimes necessary to quickly transition from one job to another.
- **Scheduling**—Scheduling time for turns, maintenance requests and PMIs can be a complicated task. Open and clear communication helps manage a difficult and sometimes stressful work load.

MAINTENANCE REQUEST DO NOT SEPARATE COPIES		CONDUCT PREVENTATIVE INSPECTION? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
CAMBRIDGE real estate services			
PROPERTY NAME HAPPY PLACE COURT APIS	PROPERTY # 100	APARTMENT # A-224	LANDLORD CAMBRIDGE REAL ESTATE SERVICES
RESIDENTS JOHN Q SMITH SALLY S. SMITH		PHONE # 508-242-3791	DATE 1/18/11
		EMAIL ADDRESS qsmith@gmail.com	
MAINTENANCE REQUEST (DESCRIBE PROBLEM) RESIDENT REPORTS SMALL LEAK UNDER KITCHEN SINK. LEAK IS SPORADIC AND HAPPENS WHEN DISPOSAL IS USED. SEVERAL SMALL DRIPS ARE REPORTEDLY COMING FROM BASE OF DISPOSAL.			
<input type="checkbox"/> Please complete at the earliest possible opportunity			
<input checked="" type="checkbox"/> Please complete on 1/19/11 between 10:00AM or 1:00PM			
Unless indicated immediately below, I hereby give Management and its contractors permission to enter my apartment at reasonable times, and even in my absence, to do the necessary repairs. This permission expires after 7 days unless the repairs are in progress and the management is making reasonable efforts to complete the repairs, in which event entry may be made until the repairs are complete.			
<input type="checkbox"/> Please provide 24 hours notice prior to entry to complete the repairs requested, OR			
<input type="checkbox"/> If practicable, enter by scheduling an appointment with the resident by calling			
Instructions to resident: To facilitate response to your maintenance request please observe the following: Do NOT put chemicals in clogged drains; do NOT leave pets or children unattended; make sure there is a clear passage for maintenance personnel; and please call immediately if there is any change in the service requested.			
Resident Signature JOHN Q SMITH		Date 1/18/11	
- OR -			
<input type="checkbox"/> Service requested by telephone or e-mail; Resident provided verbal or electronic authorization to enter apartment on _____ between the hours of _____ and _____			
By signing this request, the resident also agrees the maintenance technician may conduct a preventative maintenance inspection while in the apartment and, to the extent practical, address any necessary repairs. If it is not possible to address the repairs while performing the repairs requested by the resident under this Maintenance Request, a notice of entry will be given for the additional repair work.			
If present, resident acknowledges the repair service request was responded to. Repairs appear to be complete to the best of my knowledge, and the work area was left in acceptable condition. Resident Signature JOHN Q SMITH Date 1/18/11			

The Maintenance Request

Resident Orientation is the perfect time to introduce residents to the Workorder process and to the particularities of their unit. Take time to educate new residents on the proper use of systems to minimize damage or misuse and reduce the number of maintenance requests. For example, this may be the first time a resident has encountered a garbage disposal. Taking the time to explain how to properly use a garbage disposal and what should and should not be put down it can reduce the number of workorders your team receives.

Explain the process for requesting a workorder including standards for work quality and timing. Also, make sure your residents know where to find the afterhours emergency maintenance number and what constitutes an emergency.

Always get as many details as possible about a resident's maintenance issue.

Maintenance

Maintenance Requests should be completed within 24-48 hours. Emergency requests should be prioritized and responded to within 4 hours, including afterhours emergency maintenance calls utilizing the afterhours maintenance staff, vendors and property Emergency Procedures Manual. Following control of an emergency, repair of subsequent damage will be prioritized and completed within the standard work order time frame. Work orders requiring ordered parts should be completed promptly upon receipt of the parts. Follow-up with the resident to inform them that the parts are on order.

Receiving a Maintenance Request

When maintenance is requested by a resident, complete a Maintenance Request. The Maintenance Request forms are ordered using the B&B Print Source Order Form on [Tenant Tech](#) (Form C000). Always maintain an adequate supply of requests at the Site Office.

It's important to complete all of the fields on the maintenance request. Make sure to document the correct apartment number, name of the resident, and contact phone number. If the resident is present at the time of the completion of the request, it's necessary to obtain a signature which provides permission to enter their apartment. If the resident calls in the request, verbal consent must be noted on the Resident Signature line.

When receiving a maintenance request from a resident, ask them about the details of their maintenance issue. Providing detailed information can help your Maintenance Tech be better prepared when they arrive at the apartment to complete the work.

The Maintenance Request is a three-part form. Once the request is completed, the member of the Site Staff removes the pink copy for the purpose of follow-up. The white/yellow copies are presented to the Maintenance Technician for completion.

If indicated and permission is given by the resident, the Maintenance Request also allows the maintenance technician to conduct a Preventative Maintenance Inspection and repairs while in the apartment.

Maintenance Technicians can use a Maintenance Door Hanger ([HD Supply](#) Item #817888) or the Cambridge supplied door hanger to advise residents that they are completing work inside their apartment. The HD Supply door hanger can be left on the door following the completed work order allowing feedback on timeliness and quality of work.

When the request is completed, the Maintenance Technician is to complete the bottom portion of the Maintenance Request. The Maintenance Technician should also note the presence of pets. The Maintenance Technician leaves the yellow copy of the form for the resident. The white copy of the request is returned to the office for filing in the Unit Maintenance File and for follow-up.

Note: Write legibly when filling out a Maintenance Request. Maintenance requests are often used to demonstrate that the property has not been negligent in their response to maintenance issues, sometimes long after the issue has occurred.

Regular Maintenance

Maintenance Requests should be completed within 48 hours, and preferably within 24 hours.

Follow-up

Following up with a resident after a Maintenance Request has been completed is an excellent way to demonstrate commitment to customer service, the property and residents. Once completed by the Maintenance Technician, the bottom portion of the maintenance request will describe the work done in the resident's apartment. Use that information to discuss the quality of the repair with the resident. Is everything still in working order? Was it completed to their satisfaction?

Turnover Maintenance

Your likely busy completing a turn on your property right now. Turns are a near constant part of business. They are also an opportunity to add value to your property. Sometimes that added value comes in small packages, an upgraded light fixture, or a closet door replaced. Sometimes the package is larger, a full remodel for instance.

The scope of unit turns is defined by your budget, the condition of the apartment at move-out, and consultation with your supervisor. Not every property is in position to replace their laminate countertops with granite, or to remove those outdated cabinets and replace them with new. Taking advantage of the opportunities that arise and that your budget allows separates the good from the best.

There are several factors to consider when thinking about potential upgrades:

Know your budget – Knowing your budget is key to optimizing performance. Have you had lower vacancy than normal? Have turnover costs been below expectations? Is there a little more money in the coffers than expected? Or is the inverse true? Have turnover costs been exceeding budget for months now? Just had an unexpected major capital improvement? Knowing the financial health of your property is key to knowing the right time to adjust your turnover practices.

Is it time – It's important to evaluate the condition of replaceable items in the apartment. If everything in the apartment is in good shape, perhaps the best decision is to leave things as they are. Spending money to replace good with only slightly better doesn't necessarily add value. Knowing your market and prospects' desires can make a difference when making these kinds of decisions.

Is it desirable – In some markets, outlets with USB slots for phone charging are very popular. They can be installed in locations where people usually charge their phones, like in bedrooms or above countertops. The price for one USB outlet is around \$25 whereas the price for a regular outlet is less than a dollar. It's a great idea, but if your residents and prospects don't see a need for them, it's still wasted money.

If the resident is present at the time of the request, obtain a signature providing permission to enter.

Regular Maintenance

Know your market – Take time to tour nearby competitors. See what they offer. If your apartments don't add up, perhaps it's time to see about making some changes. Remember, a neighboring complex isn't necessarily a competitor. Location, condition, amenities *and* rent price need to be similar for a neighboring community to be comparable.

Know your options – Touring can be a great way to compare your apartment with those of your competitors—it can also be a great way to find new ideas. Perhaps it's something as simple as replacing old base trim with new. You have that old, dark, single-bevel, inch-and-a-half base trim covered in drips of paint throughout your apartments, but one of your competitors has replaced theirs with the two and a quarter inch trim from Home Depot at seventy-five cents a foot. You can't believe how much better their apartments look. Time to do a few calculations, get the total cost together (material, installation, and paint) and contact your supervisor with your sparkling new idea.

If you have a great idea and want to put it into action, be sure to contact your supervisor first. Have a complete evaluation of costs before you make the call.

Scheduling the Turn

One of the most expensive parts of a unit turn is vacancy loss. A single extra day may not seem like much, but if you complete 30 turns in a year with a single extra day that adds up to an extra month's worth of unnecessary vacancy. Effective scheduling combined with pre-leasing efforts can help reduce one of the biggest red lines on the budget.

The Pre-Move-Out Inspection

- ✓ Allows All Staff Advance Time To Schedule Turnovers Efficiently
- ✓ Allows management to communicate with residents about likely move-out charges

Once a Notice to Vacate is received:

- Schedule a Pre-Move-Out Inspection At Least Two Weeks Before Move-Out
- Use the Apartment Turnover Checklist (Form C038 in [Tenant Tech](#)) for documentation
- Determine Likely Replacement and/or Repair needs
- Note unusual wear and tear.
- Use the Itemized Statement Following Initial Pre-Vacating Inspection (Form C396 in [Tenant Tech](#)) to calculate projected move-out charges.
- Discuss the Itemized Statement with the resident. Encourage them to remedy conditions to avoid charges
- Remind residents that a Pre-Move-Out Inspection is Just A First Step; All Final Decisions Regarding Costs are Made at Move-Out

Regular Maintenance

Visiting competitors properties can give you valuable information, including new ideas for creating value in your apartments.

- Schedule vendors and order materials based on the pre-move-out inspection.
- Schedule the final move-out inspection for the Move-Out Date

The Turnover Schedule

The Maintenance Technician is required to complete the turnover work for each vacated apartment, preferably within 5 days of the move-out, using the Apartment Turnover Checklist (Form C038 on [Tenant Tech](#)). Once the turnover work is completed, the Site Manager inspects the apartment. File the completed Apartment Turnover Checklist in the Unit Maintenance File.

The Five-Day Turn – The Typical Turn Schedule

Day 1	Day 2	Day 3	Day 4	Day 5
				
Maintenance	Painting	Cleaning	Shampoo	Detail

Pressure washing should be a standard part of every turn. It can be completed on any day a vendor is working in the unit. Clean the adjacent apartments or building as well, to make the most of the time it takes to set up the pressure washer.

The Atypical Turn

It's safe to say that the standard turn can easily be completed in five days. It's the non-standard turns that give us more difficulty. Unit upgrades and turns with excessive damage may require more than one day of maintenance work and/or non-standard turn vendors. But in all cases, there are a few general rules that govern the order in which things are accomplished that help in scheduling the most efficient turn possible.

- Maintenance should occur first. This allows your maintenance tech to get their job done without potentially damaging new paint or making a mess they would then need to clean up. It also gives them an opportunity to thoroughly evaluate the unit and locate any necessary repairs that may have gone unnoticed during the pre-move-out inspection.
- Painting should precede cleaning but follow most other vendors. You don't want painting done prior to carpet installation due to the risk of paint getting on the carpet. Likewise, you wouldn't want a sheetrock repair to occur after the painter finished. Even something like cabinet replacement is best done prior to painting unless the old cabinets have been removed prior to the painters arriving.

A Turnover Board can be a great tool to keep site staff aware of the turnover schedules.

Regular Maintenance

If your carpet is *not* being replaced, then the cleaners should be the second to last vendors in your apartment, followed only by the carpet cleaner. If the carpet is being re-placed, cleaners should be the last vendor in the apartment and the carpet installed the previous day.

- It's likely there will be a few finishing touches left to complete in the apartment. The maintenance tech should complete a thorough check and review their Apartment Turnover Checklist. The Manager should also do a final check. Any remaining details should be completed prior to beginning prospect tours of the apartment.

The Three-Day Challenge

A three day turn is possible. It requires an apartment in excellent condition, vendors that are flexible and trustworthy, and some extra attention from your staff, but a 3-day turn can be done. It typically looks like this:

1. Morning Day 1 – Maintenance
2. Afternoon Day 1 – Painting
3. Morning Day 2 – Cleaning
4. Afternoon Day 2 – Carpet Cleaning
5. Day 3 – Inspections by staff and finishing details

Think you're up for it? Give it a try!

Preventative Maintenance Inspection and Repairs (PMI)

Cambridge Real Estate Services is dedicated to providing the highest quality maintenance to properties it manages, as well as exceptional service to each resident. An important component of our service is a program of Preventative Maintenance.

The Preventative Maintenance program requires that a member of the property's maintenance staff enters every apartment to inspect and evaluate the condition of all interior components twice per year. These inspections allow maintenance to complete minor repairs and detect unreported maintenance issues. A thorough evaluation of the physical condition of each residence also allows the staff to plan for future maintenance needs.

Each property is responsible for scheduling two annual Preventative Maintenance Inspections for each apartment at their property. The Preventative Maintenance Notice (Form C402 found in [Tenant Tech](#)) should be used to notify residents of an upcoming Preventative Maintenance Inspection no more than 14 days and no fewer than 3 day prior to the inspection. The Preventative Maintenance Notice should be mailed and posted to the door or front entry. A copy of the notice must also be placed in the resident file. It's recommended to have a schedule in place for the

Regular Maintenance

PMIs allow maintenance to complete minor repairs and detect unreported maintenance issues. They also allow for planning of future maintenance needs.

year to ensure your property meets the expected twice annual inspection rate, however, there are two less intrusive opportunities to complete Preventative Maintenance Inspections that can be used in conjunction with your annual schedule.

- **Apartment Turns count as a Preventative Maintenance Inspection.** If a unit has been turned in either the first half or second half of the year, there's no need to also complete a Preventative Maintenance Inspection during that period. It's recommended that the first PMI for a new resident occur a minimum of six months into their tenancy.
- **Gain Resident permission to complete a Preventative Maintenance Inspection during a maintenance request.** On the top right corner of the Maintenance Request, a box can be checked requesting the Maintenance Technician to conduct a Preventative Maintenance Inspection. Resident permission must be granted prior to completing a Preventative Maintenance Inspection during a routine maintenance request.

Using either or both of these methods requires that inspection dates are tracked so inspections aren't duplicated. The following is a sample of a simple chart you can create in Excel to keep track of when PMIs have been conducted on your property:

Apt. #	Scheduled Date	Date Completed	Scheduled Date	Date Completed
31	3/21	1/15	9/21	
32	3/21	3/21	9/21	
33	4/3		10/3	

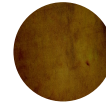
Maintenance Technicians should use the Preventative Maintenance Inspection and Repair Report (Form C037 in [Tenant Tech](#)) to record the inspection. The Preventative Maintenance Inspection is used for:

- Addressing all life safety and fire safety issues found in the unit
- Making minor repairs as needed and within budgetary guidelines
- Grading the resident's housekeeping
- Noting any pets in the unit
- Noting any resident caused damage in the unit
- Documenting the condition of the unit at the time of the inspection

The Site Manager should:

- Check this report against resident files to ensure all units with pets have a Pet Agreement and/or a paid pet deposit on file.
- Charge the resident for resident caused damage. Schedule an additional time with the

It is the responsibility of the maintenance worker to notify all parties of the request for paid leave, and to procure coverage for their absence



Regular Maintenance

resident for time consuming repairs or other reasons for re-entry.

- Contact the resident in writing regarding any lease violations.
- File the Inspection Report in the Maintenance section of the resident file.

Note: Improvements such as new flooring, countertops or cabinet door replacements, etc., are not replaced during the inspection; these are likely completed at turnover.

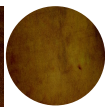
The Structure of Our Maintenance Staff

Cambridge Real Estate Services employs maintenance personnel to provide a high level of service to the residents and owners of properties. Generally, a fully skilled maintenance employee will be assigned to somewhere between 90 and 125 apartment units depending on the age and maintenance activity required at the property. Sometimes this assignment means a one-to-one correlation between a properly sized property and a maintenance worker. Often, a maintenance worker will have responsibilities that extend to benefit multiple properties.

Maintenance responsibilities for multiple, generally smaller communities can present unique issues that must receive careful focus and attention by maintenance personnel and the Site Manager. Because of this, this chapter redefines some of the administrative requirements of the job and adds additional structure to the position. Providing specific procedures for communicating helps to proactively address some of the complexities that can arise.

Generally, maintenance employees are appointed at their assigned property within a given Geographic Area (sometimes called a district) with back-up support, technical advise, and shared coverage for after-hours, on-call duty. The most typical district includes 300 to 800 apartments where stable staffing levels can range from two full time employees to as many as eight full time equivalent employees. Employees are assigned to their own individual property or cluster of properties within a geographic area while simultaneously being a part of a specific district. These districts often encompass properties located within a 20 to 30 mile radius of the most centrally located property within a district. It is within the district that maintenance employees most frequently provide mutual support and back-up for one another.

Regular Maintenance



You can from HD Supply order online, by fax, or phone.

Work Hours

Work hours can be 8:00 a.m. to 4:30 p.m. with a half-hour for lunch, or 8:00 a.m. to 5:00 p.m. with an hour lunch. The choice is to be the mutual decision of the maintenance worker and the Site Manager and may vary depending on the property. Generally a start time before 7:30 a.m. is discouraged and even starting before 8:00 a.m. can create disruptions to the residents who live at the community.

If for any reason the maintenance worker appeals to modify the work hours for a particular day, the Site Manager needs to be notified and must consent. At the Site Manager's discretion, the maintenance worker may also be asked to present the request to the Portfolio Supervisor for review, consideration and approval.

Unplanned Absences

If the maintenance worker will be absent for a work day, they are required to call the property they are scheduled to work at before the scheduled start time to notify the Site Manager of the absence. The maintenance worker also needs to inform the most senior maintenance workers in their district of their planned or unplanned absence. Please refer to the Employee Handbook regarding acceptable forms of notification.

Paid Leave

The maintenance worker is required to schedule any paid leave in advance with the manager or managers of the properties affected. The maintenance worker will also need to inform the most senior maintenance employees within their geographic district of their planned absence. Once the manager(s) and the Regional

Once the necessary Property Manager or Managers has been notified and consented to paid leave, follow the paid time off request procedure in the ADP time keeping system.

It is the responsibility of the maintenance worker to notify all parties of the request for paid leave. Furthermore, it is the maintenance worker's responsibility to actively engage with workers in their district regarding the assignment of temporary coverage for their property or properties, and the on-call emergency response system while temporarily absent from the workplace.

Temporary Reassignments

Temporary reassignments within a district are common. They occur as an emergency or urgent maintenance requests are received, and as staffing levels within the district require. A temporary reassignment can be as short as one day or as long as several days. In the event a temporary reassignment is required (typically due to an unforeseen emergency), one or more Site Managers within a district will collaborate regarding the needs of their property or properties, and the affected maintenance worker(s) will be notified of the temporary assignments. Generally, districts have more senior managers that will be part of the objective evaluation of the best manner to allocate maintenance staff resources within the district to meet the needs of all communities within a given district.

Site Managers in need of emergency service are encouraged to contact fellow property managers to arrange for backup maintenance staff. This is preferable to managers reaching and contacting maintenance workers directly. Cambridge encourages cooperation between Site Manager/properties whenever possible as our goal is to work as one larger organization rather than many individual property-based operating silos.

If a temporary reassignment of staff greater than one day is approved by all parties, the Site Manager requesting the emergency service shall assume responsibility for providing a courtesy notification to the Property Supervisor, Cambridge's Payroll Department, and other properties within the district. Such notification is encouraged to occur promptly and certainly either prior to or during the temporary assignment.

HD Supply Solutions Purchase Procedures

Before ordering you should obtain a catalog. You can call 1-800-431-3000, extension 0 to have one mailed directly to your property. There are three ways to order from HD Supply: on-line, by fax, or by phone.

Ordering On-Line

Purchases from HD Supply Solutions are made online at [HD Supply](#).

An account number is needed. If you don't have one already, your Property Supervisor can coordinate with a member of the Central Office, and they will set up an account for your use.

Once on-line, the account number can be requested, and a personalized user ID established. The Registration section is found on the home page (right in the middle). From there, the username and password are set up.

Keep trips to Home Depot to a minimum by staying on top of inventory.

Regular Maintenance

Order by Fax

Using the fax sheet included with your HD Supply Catalog or print it off [here](#). Whenever ordering by fax, fill out the form completely, print legibly, double check the order number and include accurate descriptions to avoid errors. Fax the completed form to the number listed on the form.

Ordering Via Phone

To order by phone, call 1-800-431-3000.

When ordering supplies via phone, simply tell the Customer Service Representative what you want and confirm the billing address.

Purchases arrive typically the following day if placed by 3:00 p.m. PST, via UPS, FedEx or the HD Supply Truck. Orders placed after 3:00 p.m. PST will be processed the next day. Some orders may take as long as 5 days.

For orders under \$50, there will be a handling and delivery charge. Orders over \$50 incur no delivery fee or handling charge. Some larger items may have an additional handling charge, but this will typically be noted in the catalog, on-line, or via the phone.

When there are personnel changes, please contact the Central Office so a user can be added or deleted.

Note: There is a dollar spending limit per property.

Home Depot Store Purchase Procedures

Site Managers and Lead Maintenance Personnel are required to obtain authorization from the Property Supervisor to receive a Home Depot card. When approved, a personalized card will be ordered from Home Depot for the employee by the Central Office. It will take approximately 7-10 days for the card to arrive at the site.

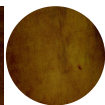
If purchases need to be made prior to the receipt of an individual card, purchasers can go to the Home Depot "Contractors Counter" to check-out. The clerk will ask the purchaser for personal picture identification, the property account number (which can be obtained from Central Office), and a purchase order number, which can be your community's name. When the personal Home Depot Card arrives, purchases for the property can be made at any check-out counter.

Purchases at Home Depot should only occur if absolutely necessary, as it is more efficient to order from HD Supply and have materials delivered to the property. Purchases at Home Depot should be approved in advance by the Property Manager.

Each community's account has a maximum dollar limit. That amount can be obtained from the Property Supervisor.

All receipts for purchases made at the store need to be delivered to the Site Manager.

Regular Maintenance



Mold and Mildew require Moisture to grow. Addressing mold requires addressing the moisture issue.

If you encounter problems at the Home Depot check-out counter, contact the Central Office and someone will attempt to resolve the situation immediately.

Note: Before ordering supplies, always refer to the property's budget and be aware of amounts allocated in all maintenance expense areas. Review the budget and monthly maintenance-related expenditures with the maintenance staff. It is good practice to maintain a detailed inventory of all available supplies in the maintenance shop.

Mold and Mildew Remediation

Mold, also referred to as mildew or fungus, is found throughout the environment. Mold growth may be caused by leaking roof, pipe leaks, sewage backups, floods, high humidity, heating, leaks in air conditioning and ventilation systems, construction design defects in the building envelope and water-damaged building materials.

In the residential environment, mold can be found growing in wallboards, carpets, ceiling tiles, books and papers, plywood, wooden studs, and wooden furnishings. As long as moisture is present, mold will grow; without moisture, mold cannot reproduce.

Many mold and mildews are quite common and have no adverse health effects. A few species of mold however, if present in a large enough quantity, may have the potential to cause adverse health effects in certain susceptible individuals. Therefore, mold and mildew issues on your property should be taken seriously and addressed according to the guidelines detailed below.

The conditions necessary for mold growth to occur on surfaces are:

- Moisture
- Temperature ranging between 40-100 degrees Fahrenheit
- Mold spores
- Nutrient base – Something the organism can metabolize, such as cellulose in wood, paper and ceiling tiles, or dirt in carpets and hidden areas.

The purpose of these guidelines is to establish procedures for addressing mold and mildew reported or observed at a property. Some of the material in these guidelines is taken from the Environmental Protection Agency and the Center for Disease Control. Please read in full the procedures, forms and related documentation contained in these guidelines.

Addressing Mold Related Issues

Mold requires a water source and prefers a dark, stagnant environment. Therefore, should a resident notify you of water intrusion, remove the existing water as quickly as possible, schedule repairs, and supply the resident with a dehumidifier. The use of ceiling fans, if available, and lower air conditioning temperatures are also highly recommended. All molds, should they be left un-

Read safety precautions thoroughly before dealing with Mold and/or Lead.

Regular Maintenance

treated and allowed to grow, may cause health concerns for individuals suffering from allergies to mold, have immune deficiencies or sinus conditions. Our goal is to remediate all issues involving mold, and therefore reduce the health concerns of our residents.

Click to obtain printable version of the [Guidelines for Assessment and Remediation of Fungal Contamination](#).

Safety Precautions When Dealing with Mold/Lead

- Wear rubber gloves or vinyl gloves when handling moldy materials.
- Wear appropriate clothing and shoes, including eye protection; during cleanup of the area.
- Wear appropriate P100 particulate respirator, listed in the Cambridge Specifications Sheet.
- Turn off all HVAC equipment.
- Exercise caution around any electrical equipment or fixtures.
- Make sure the area is well ventilated at all times during the removal process. Do not fan an area where mold is present or suspected.
- Read and follow the instructions and safety data sheets (MSDS) of all chemicals used.
- HEPA vacuum clean the entire work area at completion. (HEPA vacuums are available at The Home Depot or similar hardware/home center type stores.)
- Wipe clean all surfaces in the work area at completion of the cleaning and removal process.
- Wash hands thoroughly and HEPA vacuum all clothes during any break and at completion of the cleanup project.

Humidity

Webster's defines humidity as: a moderate degree of wetness especially of the atmosphere. Basically, humidity is how much water is in the air. As we all know, water, or moisture, is one of the two key components that mold needs to grow, the other being organic materials, especially ones containing cellulose. In our industry, testing for humidity becomes important when tracing the possible sources of a mold outbreak in one of our structures.

When mold is brought about because of a leaky toilet, a clogged downspout, or a leaky supply line under a sink, the source of moisture is obvious, and more often than not, the remedy is simple to determine. Many times, though, moisture is present, but the source is elusive. Ventilation (or lack thereof,) temperature, and relative humidity are three variables that become important in the hunt to determine the source of moisture. Relative humidity is the ratio of the amount of water vapor actually present in the air to the greatest amount possible at the same temperature.

Using a hygrometer, which is a device that measures temperature and relative humidity, we can get a measurement of how warm a room is, and also find the relative humidity of that same room. Let's use an example.

Regular Maintenance

Always document the temperature and relative humidity of the room or rooms on the work order. This will help track the cause of the mold or mil-

Responding to a work order in unit 2222, we use our hygrometer and find the temperature in the living area is 68 degrees Fahrenheit, and the relative humidity is 45%. This means, that at a temperature of 68 degrees, the air currently has 45% of the total water vapor that it can hold at that temperature.

This may sound like a lot of moisture in the air, but humidity below 30% can lead to discomfort (dry skin and nose) and lower levels of relative humidity can cause wood to shrink, paint to crack, and static electricity to discharge. Levels above 60% to 70% can lead to problems with mold and mildew. So, for any given temperature, a relative humidity between 30% and 50% is acceptable. Remember, if the temperature drops, and that same amount of humidity stays in the room, the relative humidity will increase, as the cooler air cannot hold as much water vapor.

Hydrosensors and Hygrometers

When responding to a work order for mold and mildew, the site staff should always bring two pieces of equipment. One is a Hydrosensor, to check for saturated surfaces, and the other is a hygrometer, to check temperature and relative humidity. This can help determine if the cause of the mold is caused by lifestyle or a lack of ventilation if the source of moisture is not apparent.

Always document the temperature and relative humidity of the room or rooms on the work order. This will help track the cause of the mold or mildew.

Another example – In unit 2112, there are five occupants living in a two-bedroom apartment, and they complain of mold on the wall by the living room window. The residents like to be frugal and save money by keeping their heat bills to a minimum. They keep the blinds closed, to help insulate their windows. The temperature of the unit is 65 degrees, and there is a relative humidity of 72%. There are no leaks that can be found, but the window has condensation. Determining the relative humidity of the unit helps us understand that the air just cannot hold all the water vapor, and it's collecting on the colder surfaces, such as the window and the outside wall. Some things that may help the situation are:

- Turning on the heat – higher temperatures can absorb more water vapor
- Opening the blinds – ventilation is important and closing the blinds keeps the circulating air from helping to keep water from condensing.
- Keep the window weep holes clean – This will allow moisture that has collected to exit the unit



Using a Hydrosensor, and a hygrometer and documenting the results is a great tool for educating your residents.

Regular Maintenance

- Proper ventilation – be sure bath fans and vented range hood fans are in use, and are clean and properly working, but if the range hood fan is not vented, remember that the moisture from cooking will stay in the unit until ventilated by some other means. Often, this is just by opening a window for a period of time, although that can be hard to do during winter months.
- Installing a dehumidifier can be a good, short term solution by quickly removing the moisture, but long term lifestyle changes must happen to keep the moisture levels down. By documenting that the temperature is 64 degrees, and the relative humidity of this unit is 72%, this will help create a record that the mold or mildew is created by the resident's lifestyle, and proper education is the key to solving the issue. It is vital that we work with residents to help them understand how to keep moisture at an acceptable level inside their apartments. Some common causes of moisture:
 - Multiple persons – Four people will produce three gallons of water vapor a day
 - Cooking for long periods of time on high heat
 - Keeping the windows shut
 - Trying to save on energy bills by not using heat
 - Not using the bath fan after showering
 - Keeping blinds and doors shut
 - Pushing objects, such as furniture or boxes against exterior walls
 - Overfilling closets



Remember, using a Hydrosensor, and a hygrometer and documenting the results when responding to work orders involving mold or moisture is of paramount importance, and is one of your best tools in the education of your residents.

Whoa... Wait... What? Yeah, I said that same thing. Let's try to make this easier to understand.

One fact that's important to know when determining problems with humidity, is that the warmer the temperature of the air, the more water vapor it can hold before condensing on the surfaces of the room, such as walls, windows, or ceilings.



Every site should have a complete and up-to-date Emergency Procedures Binder located in an accessible location.

If you are currently experiencing an Emergency, refer to the red Emergency Procedures Binder.

Employee Safety Manual

The Employee Safety Manual includes general Guidelines, New Employee Training, Safe Work Expectations, Maintenance Safety, Mold and Lead Safety, Fire Safety and Prevention, Hazardous Materials, Incident Reporting, Site Office Safety Procedure, Safety Related Forms and Emergency Contact information not included here. Click [here](#) for a digital copy of the Employee Safety Manual.

Safety Guidelines

Safety can only be achieved through teamwork at our company. Each employee, supervisor and manager must practice safety awareness by thinking defensively, anticipating unsafe situations and reporting unsafe conditions immediately.

Please observe the following precautions:

- Notify your Immediate Supervisor of any emergency situation. If you are injured or become sick at work, no matter how slightly, you must inform your Immediate Supervisor immediately.
- The use of alcoholic beverages or illegal substances during working hours will not be tolerated. The possession of alcoholic beverages or illegal substances on the company's property is forbidden.
- Use, adjust and repair machines and equipment only if you are trained and qualified.
- Know the proper lifting procedures. Get help when lifting or pushing heavy objects.
- Understand your job fully and follow instructions. If you are not sure of the safe procedure, don't guess; contact your Property Supervisor.
- Know the locations, contents and use of first aid and fire fighting equipment.
- Wear personal protective equipment in accordance with the job you are performing.
- Comply with OSHA standards and/or applicable state job safety and health standards as written in our safety procedures manual.

A violation of a safety precaution is in itself an unsafe act. A violation may lead to disciplinary action, up to and including discharge.

All properties should meet monthly to discuss safety topics provided by the Safety Committee.

Emergency Preparedness

Site Manager's Safety Responsibilities

Each of our Site Managers have an important responsibility for safety in their respective areas. They are the primary contact and have immediate control over their employees.

The Site Managers responsibilities and duties will include, but are not limited to:

- To acquire and maintain a copy of the Cambridge Real Estate Services Safety Manual and MSDS.
- Ensure all site employee know where the Safety Manual and MSDS is located.
- Provide safety training and support to site employees.
- Enforce the safety rules, procedures, and guideline set forth by the Cambridge Real Estate Services Safety Committee.
- Meet monthly with site staff to discuss safety topics (provided by the Safety Committee), communicate site specific safety related incidents and issues, and encourage employee input regarding incident prevention.
- Conduct quarterly "Community Safety Inspections" of the property, submit reports to your Property Supervisor. An inspection worksheet can be found on Tenant Technologies.

Basic Employee Responsibilities

Cambridge Real Estate Services expects our employees to follow all objectives for safe work performance and be responsible for their own actions and conduct. OSHA requires that we furnish employees a place of employment "free from recognized hazards that are causing or are likely to cause death or serious physical harm to employees." Our workers also play a significant role in the success or failure of our safety program.

Primary Expectations of Employees

Employee responsibilities for safety include the following:

- Practice good safe work habits and follow all safety mandates, company expectations, and regulations. Do not operate equipment without the necessary training. Make certain that all safety features are in place and in working order.
- Wear and maintain appropriate safety equipment as required by your supervisor.
- Keep your area in good housekeeping order.
- Report all injuries and incident to your supervisor immediately.
- Participate in safety by attending meetings or submitting good suggestions for improvement.



All Cambridge employees are expected to perform their jobs to the best of their ability as and in a safe manner.

General Expectations of Employees

All Cambridge Real Estate Services employees are expected to perform their jobs to the best of their ability as well as perform them in a safe manner. It is critical that employees do not circumvent safety features and safe work behaviors that can cause them or others to be at risk. All accidents are preventable. We must each carry out our safety responsibility. We each share a common goal and these are our expectations of each person working at Cambridge Real Estate Services.

Follow the safe job procedures established by your supervisor. Perform only those jobs to which you have been assigned and properly instructed.

- Wear the protective equipment required for your job, as established by your supervisor. Be certain that protective equipment is kept clean and in good repair.
- Report damaged equipment immediately for replacement or repair. Do not perform your task without the appropriate protection.
- Report unsafe work practices and/or unsafe conditions immediately. You may use the company reporting system to record your concern anonymously.
- Report all incidents immediately. Summon first aid as soon as possible when injuries demand prompt attention. Only authorized first-aid personnel should be administering first aid treatment. This includes trained employees, emergency medical technicians (EMTs), paramedics, and medical personnel. No employee shall attempt to remove foreign objects from any injured person.
- Keep all mechanical safeguards in position during operation. Refer to our company policy and department/equipment-specific lockout/tagout procedure when maintenance or setup is underway. Place the equipment in the “off” position when removing materials, jams, or performing minor maintenance or adjustments. Render idle machines unusable by locking the disconnect.
- Do not operate equipment for which you have not been trained or authorized. If you have questions about the safe operation of a machine, contact your supervisor immediately. Under no circumstances should machines be used in an unsafe manner or with safety features missing, malfunctioning, or circumvented.
- Keep all fire protection equipment, exits, and suppression equipment clear of obstructions, supplies, or equipment, etc.
- Do not use flammable or combustible solvents in open, unlabeled containers.

Always keep a supply of safety equipment on hand. You never know when you'll need it.

Emergency Preparedness

Maintenance Safety

The following are job-specific safe work expectations and are minimum guidelines to help you avoid injury. This list is not all-inclusive. This list is intended as a summary of “best maintenance safety practices.” You will be expected to practice them regularly and commit them to habit. This is a prerequisite to your continued employment, as well as your own safety.

Protect Yourself

Always stock safety equipment. Make sure site staff has access to safety glasses, dust masks, ear protection, etc. All of the listed items are rather inexpensive, especially when compared to the cost of the accidents they're designed to prevent.

- **Use ear protection:** When using loud equipment such as a pressure washer or blower, it is imperative to use ear protection. Although many backpack blowers claim to have low noise (around 65 dB,) realistically, they tend to operate in the 90 to 120 dB range. This means blowing your parking lot has the potential for permanent damage without ear protection. Equipment such as a circular saw or a shop-vac apply as well.
- **Use eye protection:** Eye protection should be worn whenever using heavy tools or power equipment such as saws, drills, sledgehammers, etc. It should also be used in conjunction with the proper gloves when using chemicals.
- **Use dust masks:** Dust masks should be worn during any activity that produces small particulates, such as sanding wood or drywall, but should also be used during sweeping out dusty spaces or using the backpack blower.
- **Use gloves and other protective gear:** Gloves are on the front line of protection against injury or contamination ranging from splinters to chemical burns to the avian flu. Use the proper glove for the proper job, whether it be leather for working around trash areas or with wood, or PVC for working with chemicals. Using latex or Nitrile gloves help prevent the spread of bacteria when finding that you have to use your hands in those less than ideal situations.
- **Think before you lift:** Use proper lifting techniques, bending with your knees, not your back. Do not overtax yourself. For more information, please see "Safe Lifting" Chapter in this handbook.
- **Use a step stool or ladder:** Use a step stool or ladder when working or bringing heavy or bulky items down from high places. Do not overextend your reach. Remember, Cambridge employees are not allowed on ladders past the second story gutter line, and are never to be on a roof.
- **Avoid eye strain:** Rest your eyes periodically when doing close work.
- **Avoid muscle strain:** Use proper posture, and change positions when sitting or standing for long periods. Make sure your chair is adjusted to the proper height.

For more on Maintenance Safety—See the [Employee Safety Manual](#)

Make updating information part of your standard move-in procedure to stay up to date.

The Emergency Procedures Binder

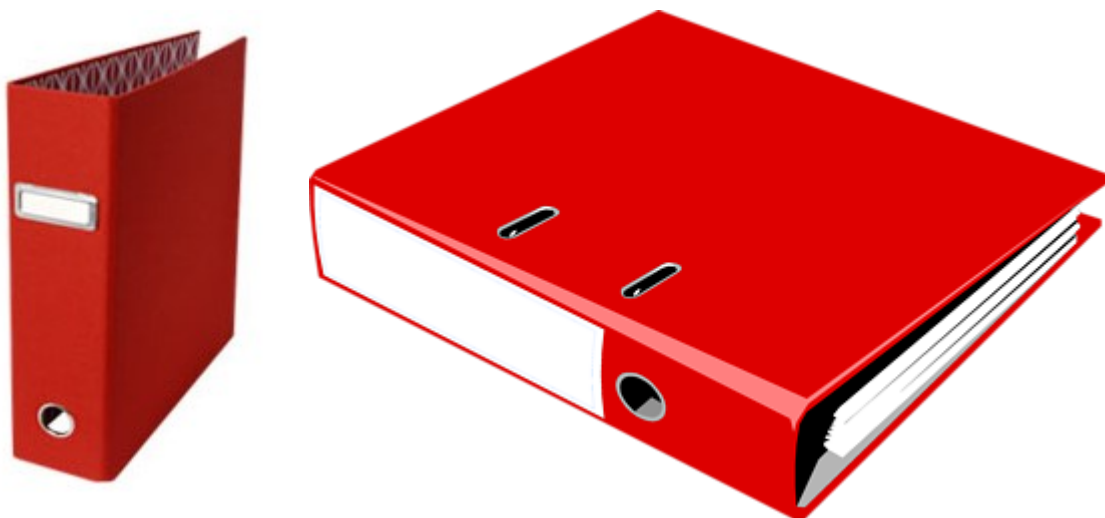
Every Property is required to maintain an Emergency Procedures Binder to aid in quick and effective response if an emergency were to occur.

Information must be updated no less than once per month, or as information changes, such as new resident information, vacant apartments, changes in phone numbers etc.

Compile and complete your Site Specific Emergency Procedures Binder according to the instruction on the following pages.

The Binder

- Keep in a red three ring binder ([Office Depot](#) Item #209197)
- Clearly Label the binder “Emergency Procedures Manual” along the spine and face of the binder.
- Use a section divider between each section and clearly label tabs with the section title. The completed binder will have 6 tabs. ([Office Depot](#) Item #933218)
- Store the binder in a secure and accessible location known to all Site Staff and any Maintenance Technicians on call for your property.
- Review any major changes to the information with Site Staff as they occur.



Scan a copy of the completed map onto your computer to create a permanent electronic copy.



Section 1: Site Map

Your Site Map should be easy to read and understand. Color code each location type. At some properties, it may be necessary to use more than one map.

Mark the Following Locations on your Map:

- Unit Numbers (Site Map)
- Site Office
- Maintenance Shop
- Storage Areas / Non-Resident Occupied Areas
- Water shut-off valve locations-all buildings
- Natural gas shut-off valve locations-all buildings
- Main electrical circuit breaker locations
- Fire extinguisher locations
- Sprinkler system control location and zone map (if applicable)
- Attic access locations
- Crawl Space Access
- In-house fire alarm panel locations (specific to “interior” buildings)

Sample Map Key:

Fire Extinguisher Locations – Red
 Main Electrical Circuit Breaker Locations – Orange
 In-House Fire Alarm Panel Locations – Yellow
 Natural Gas Shut-Off Valves – Green
 Water Shut Off Valves – Blue
 Sprinkler System Control Location and Zone Map – Purple
 Attic Access Locations – Circled
 Crawl Space Access – X

Once completed, fax or email your Site Emergency Response Map to the Central Office. The map will be kept on file.

Section 2: Directions to the Property

Directions Should Be Clear and Concise (Google Maps is a great tool for generating directions)

Include:

- ✓ Directions to the property from the North
- ✓ Directions to the property from the South
- ✓ Directions to the property from the East
- ✓ Directions to the property from the West

Example:

1. Coming from the East to the Central Office
2. Take I-84 Westbound
3. When approaching the I-5 interchange use the Left two lanes to take I5 South
4. Keep Left
5. In 1.1 miles, keep left at the fork to continue I-405
6. Use the right 2 lanes to take exit 2B toward Everett Street/Glisan Street Exit
7. Merge onto NW 14th
8. The Central Office will be on the left at 1107 NW 14th Ave #200, Portland, OR 97209

Section 3: Contact Information

Print the Contact List and Afterhours Emergency Maintenance Schedule on the following two pages and fill in all applicable numbers for your property. If needed, write in other numbers that may be necessary in an emergency at your location. Update numbers when there is a change in staff at your property.

Section 4: Unit Features

Label the following items clearly on your property's floorplans for each unit type:

- Unit floor plans with circuit breaker locations
- In unit water shut off valves (if applicable)
- In unit hot water heater locations (if applicable)
- Unit specifications (examples: pullcord alarm locations in units; location of smoke detectors)

Copies of your property's floorplans can be found on your Community Website.

In case of Fire or Threat to Life call 911

Property Name: - _____

Address - _____

Phone - _____

Emergency Numbers:

Fire - _____

Police - _____

Poison Control - _____

Animal Control - _____

Suicide Prevention Hotline - _____

Child Protective Services - _____

Adult Protective Services - _____

Security Alarm Monitoring Company - _____

Utility Providers:

Electric Utility Company 24 Hour Number - _____

Natural Gas Utility Company 24 Hour Number - _____

Security Alarm Monitoring Company - _____

Account Number - _____

Password - _____

Cambridge Real Estate Services Supervisors

Janeen Kallus - 503 450-0238 Colin Macdonald - 503 450-0234

Damon Kenyon - 503 445-2792 Kristin Strong - 503 450-0248

Jeff Passadore - 503 450-0233

Site Staff:

Afterhours Emergency Maintenance Number- _____

Site Manager - _____

Assistant Manager - _____

Leasing Agent - _____

Maintenance Technician - _____

Maintenance Technician - _____

Vendors:

Plumber - _____ - _____

Carpet Cleaner - _____ - _____

Restoration Company - _____ - _____

Other:

Local Red Cross - _____

Local Hotel(s) for temporary Resident

Salvation Army - _____

Relocation _____

On Call Maintenance Tech
Afterhours Emergency
Maintenance number

Name

Alt. Contact number

Home Property

Month _____

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

Write in the schedule for your property's On Call Maintenance Tech. Update every month.

You can create a new binder section if your property has issues that emergency responders should be aware of.

Section 5: Emergency Report Forms

Print copies of the following forms.

- ✓ Incident Report (Form C360 on [Tenant Tech](#))
- ✓ On the Job Injury Report (Form C364 on [Tenant Tech](#))

The Incident Report

The purpose of incident reporting is to notify Cambridge Real Estate Services and the property's insurance carrier if a guest or resident is injured at the property, or of any damage to the property or automobiles. All incidents should be reported to Cambridge Real Estate Services within 24 hours. Keep all information confidential.

Please complete ALL areas of the Incident Report with as much factual information as possible, with the exception of the "Contributing Factors"—that section should be left blank. Be sure to list brief facts, rather than speculations by staff or others, as to what could have occurred or caused the incident to occur.

Be sure to take photos, measurements of the damage, and document weather conditions for weather related incidents.

Utilize supervisor approved vendors, and if your "Incident" turns into an Insurance Claim—be sure to keep your accountant in the loop about invoices being coded for insurance purposes, as different accounts are used.

Be proactive about requesting reports—from vendors, police, fire, etc. to help document your incident or claim.

On the Job Injury Report

Fill out this form as soon as an injured worker is medically stationary or within 24 hours from time of injury. Once completed, fax or email to the Human Resources Department at 503-546-7588. Insure all information is complete and accurate.

Section 6: Resident Information

Yardi and Tenant Tech Reports can provide much of the information below. For easy updating, print a rent roll report once per month, at minimum.

- Resident's apartment numbers
- Resident names (including children)
- Resident garage numbers (if applicable)
- Resident vehicle descriptions and plate numbers
- Resident parking space assignments
- Resident phone numbers (home/work)



It is your responsibility to bring to your Supervisor's attention any unsafe conditions or work practices found on your property.

Note: Depending on your property's location, there may be some issues that would specifically pertain to your property that responders to an emergency should be aware of. You can create a separate section for that information. Check with your Property Supervisor for details or if you have any questions.

Safety Practices

Cambridge Real Estate Services has established a safety and health program adapted to fundamental occupation safety and health concepts that will help us prevent injury and illness due to hazards. Injury and illness from accidents are costly and often-times preventable.

Employee Safety and Accident Prevention

It is your responsibility to bring to your Supervisor's attention any unsafe conditions or work practices found on your property. Report immediately any injuries that occur, no matter how small, and have them treated. Even cuts and scratches can become infected unless properly cared for. Follow these simple rules to prevent accidents:

- Always act and work safely on the job.
- Work at a safe pace for the job.
- Strictly obey all warning tags, signs and labels.
- Always wear personal protective equipment where required.
- Do not leave power equipment with the engine running.

Lifting and Carrying

Lift comfortably. You are the best judge of the most comfortable position for yourself. Always...

- Use 3.5-gallon containers for paint.
- Use two people if necessary.
- When carrying, do not let the object obstruct your vision.

Personal Safety

Your personal safety is very important! Always...

- Locate first aid kits in the office and maintenance rooms.
- Take precautions when working near moving machinery.
- Use personal protective equipment.
- Use appropriate respirators when working around harmful dust, acid vapor, chemicals, or similar materials.

If a resident requests, disclose relevant criminal activity on the property. Residents can also contact the local Police agency.



Safety Equipment

Common safety equipment that should be available for use at all times are:

- Respirators/dust masks
- Safety goggles
- Ear protection
- Gloves
- Lifting belts

Apartment Security

Locks — all apartments are provided with working locks and window latches at the time of move in. Residents are instructed to notify management with mechanical problems with locks.

Peepholes — an additional peephole will be installed on request. (There should be no more than two peepholes.)

Asbestos Maintenance

If you know of, or even suspect any asbestos in an area in which you are or will be working, contact your Supervisor. Do not work in that area until you receive clearance.

Burglary

If a resident requests, the manager is instructed to disclose relevant criminal activity on the property. Residents can also contact the local Police agency.

Chemicals

Read all labels carefully and follow directions and follow these precautionary measures:

- Chemical drain openers are not to be used.
- Keep chemicals in their original bottles.
- Wear rubber gloves and use protective masks.
- Swimming pool chemicals must be stored away from the pool heater under dry conditions.



Keep a copy of the Employee Safety Manual in a location accessible by all site staff.

Driving Safety

When there is the need to use your personal vehicle on the property:

- Your vehicle must be operable and insured.
- Obey all state driving laws.
- Use defensive driving techniques.
- Use caution based on weather conditions.

Electricity

Use extreme caution when working near electricity.

- Use property lockout/tagout procedures
- Do not try to repair or adjust any electrical equipment unless it is part of your work and you are fully trained to do so.
- Never use frayed, cracked, or deteriorated extension or equipment cords.
- Do not touch dangling wires.

Fire Prevention

Educate all staff members and residents on fire prevention. Follow these steps:

- Fire extinguisher testing — Fire extinguishers must be on a yearly testing program through a contract with a local vendor.
- If a fire extinguisher is deployed or stolen, promptly replace it.
- Know the locations of the fire extinguishers and how to use them.
- Inform all residents of the location of fire extinguishers.
- All spills of flammable liquids must be cleaned up promptly.
- Keep all flammable liquids in safety containers. Store flammables in properly vented rooms.

Hand Tools

When using hand tools for any type of work, always...

- Keep hand tools in good condition. Repair or discard defective hand tools.
- Use the correct tool for the job.
- Do not take safety devices off tools.

For your own safety, keep prospect photo identification in a safe location while touring units.

Emergency Preparedness

Housekeeping

Whether your property has an on-site housekeeper or uses a vendor, use this list to help prevent accidents:

- Keep all exit doors and aisles clear of obstructions.
- Keep work areas clean and clear.
- Use waste cans for all general debris. Oily rags and other flammable waste should be stored in covered, metal safety cans.
- Use a broom and pan when removing broken glass.
- When vacuuming, use a brightly colored extension cord and check frequently to be sure it is not a hazard to others.

Ladders

Company policy forbids employees from working on a second-story roof or ladders more than 12 feet high. Also follow these tips:

- Straight ladders should have safety feet.
- Never use aluminum ladders near electrical lines or power boxes.
- Spread stepladders all the way open.
- Never stand or sit on the top rung of a ladder.

Lead Based Paint

Lead based paint is found in housing/buildings built before 1978. If you are or will be working on housing built before 1978, check with your Supervisor before starting any projects involving work with the paint.

Leasing Safety

All office staff members need to follow safety too! Keep these tips in mind:

- Apartments should not be shown after dark.
- Photo identification is required prior to touring a prospect. Take a driver's license, passport or other governmentally issued identification document from the prospect and leave it in the office. Do not take it with you or return it to the prospect until after the tour is complete.
- All prospects must be treated equally, therefore all adult prospects are required to present identification without exception. All staff at the property must strictly adhere to this policy.
- The photo identification policy must be posted in the office.
- Let someone know exactly where you are and when you expect to return.

Emergency Preparedness



Always order a locate prior to having work done below ground on your property.

- Keep the apartment door open during the tour. (Flip the deadbolt with the door open or use the door stop.)
- Position yourself between the prospect and the door. (Don't walk ahead into bedrooms, bathrooms or other areas where you could be cornered.)
- Keep groups of people together.
- Be aware of body language.
- Employees are instructed not to show apartments to prospects who are exhibiting erratic or hostile behavior. Call the police.

MSDS — Material Safety Data Sheet

The first key to safety when using any type of chemical is the MSDS.

- Whenever using a chemical for the first time, or one not familiar to you, consult your Material Safety Data Sheet before proceeding with the task.
- MSDS Books can be purchased from Paragon.
- Inventory the binder periodically.
- Whenever purchasing a new chemical, request the MSDS from the seller. They are required by law to have these on hand at the time of purchase.

Power Tools

Know what each power tool is specifically designed to do. And...

- Never operate an electrical tool near water.
- Use the tool as it was designed to be used.
- Make sure the tool is properly maintained.
- Use the right tool for the job.
- Use protective devices.

Utility Locating

Before digging a foot or more in the ground, utilities must be located.

Red — electrical power lines, cables, conduit and lighting cables

Yellow — gas, oil, steam, petroleum or gaseous materials

Orange— communication, alarm or signal lines, cable television

Blue—water, irrigation

Green—storm drain lines, sewer

White—proposed excavation

Carbon Monoxide Detectors should be used in units where a potential Carbon Monoxide source is present.

Carbon Monoxide Safety

Requirement in the State of Oregon

All available units with a source of carbon monoxide (CO) are required to have a CO detector installed within 15 feet of the sleeping area of the unit (but no closer than 4" to where the wall & ceiling meet). Sites with units that do not have carbon monoxide sources are exempt from installing CO detectors.

Carbon monoxide sources include:

- Gas Heaters (including gas water heaters)
- Gas Fireplaces
- Gas Dryers
- Wood Burning Stoves
- Gas Cooking Ranges (as well as any cooking sources that use coal, kerosene, petroleum products, wood, or other fuels that emit carbon monoxide as a by-product of combustion)
- Attached Garages (automobiles are also a source of CO)

If not included on the list above, any appliance that uses natural gas, coal, kerosene, petroleum products, wood or other fuels that emit CO as a by-product of combustion would be a possible source of carbon monoxide.

If you have any questions about which CO detector to purchase for your community (as there are hardwired as well as battery operated detectors available) please contact your supervisor.



Investigations should be made as soon after an incident as possible. A delay may allow important facts to be destroyed or removed.

Incident Management

An incident investigation should be accomplished following every incident. The purpose of investigating an incident is to determine the incident cause so that similar incidents can be prevented.

It is the responsibility of the On-Site Staff to make an immediate report of every incident. After an incident, discuss methods to prevent similar incidents from occurring in the future with your Supervisor and implement solutions.

Each investigation should be made as soon after the incident as possible. A delay of only a few hours may allow important facts to be destroyed or removed.

Incidents Involving Non-Employees: Do's and Don'ts

Do...

- Go to the scene of the incident at once.
- Show your concern for the injured parties health and safety.
- Secure the scene so that others are not injured.
- Be courteous.
- Be professional.
- Inspect scene closely.
- Get all essential details.
- Report the accident to our insurance carrier at your earliest convenience, no matter how slight the injury.
- Contact your Property Supervisor as soon as possible when a non-employee incident has occurred for the appropriate investigation to commence.

Don't...

- Apologize for the incident.
- Argue with the injured party about the cause of the incident.
- Reprimand an employee at the scene of an incident.
- Offer to pay medical expenses
- Admit responsibility (responsibility is often a legal conclusion that parties at the scene are not competent to make)
- Mention Insurance
- Discuss the incident with anyone other than parties within your organization that need the information. Only discuss the incident with outside parties upon the recommendation of your legal counsel.
- Permit investigators to take pictures at the scene without supervision and management approval.

If the Media arrive at your property, contact your Supervisor immediately.

Emergency Preparedness

Managing an Incident

An incident scene can be a chaotic place, particularly when injuries are involved. The Property Manager will take charge of the site and direct response activities, evaluate the scene and determine if emergency response is necessary.

If the scene requires emergency response, call 911 immediately.

Step 1 – Take Charge of the Site.

- **Evaluate** - Evaluate the scene and determine if emergency response is necessary.
- **Emergency Response** - If the scene requires emergency response, call 911 immediately.
- **Injuries** - Determine if there are any injured individuals
- **Hazards** - Determine if hazardous conditions at the scene present an immediate threat to the health or safety of anyone, including rescue workers.

Step 2 – Treat the injured.

- The care and treatment of the injured will take priority at the scene unless hazardous conditions present an immediate threat to health or safety, then securing the site should take priority.
- Make the injured person as comfortable as possible
- Make sure that proper emergency help has been summoned and the victims are given the necessary first-aid.
- If emergency providers are already on the scene, the manager should ensure they receive whatever cooperation they need to get the job done.
- Secure the injured person's version of the incident.
- Only authorized first-aid personnel should administer first-aid treatment. This includes trained employees, emergency medical technicians (EMTs), paramedics, and medical personnel.

Step 3 - Secure the Site

- If anything at the scene still presents a danger, restrict access to the area until the hazard has been eliminated or controlled.
- If there is any uncertainty about safety at an accident site, don't take chances.
- Keep people out of the area until no danger remains. Caution or Danger Tape, role, cones, barricades, or other types of signs can be used to restrict access to the area. If none of these are available, employees may be posted around the site to keep people out of an area.
- Keep the area from being disturbed until it has been inspected.



An incident scene can be chaotic. The Property Manager needs to take charge of the site and direct response activities.

Step 4 - Secure the Names of Witnesses

- Gather names, addresses, telephone numbers, and accounts of the incident from others in the vicinity. Please remember that a person may witness an incident with any of their five senses. An impartial witness is more credible than an employee.
- Gather the names, addresses, telephone numbers, and accounts of the incident from employees.
- Have two or more employees to inspect the scene of the incident and fill out witness reports on what they saw.

Step 5 - Evaluate the Condition of the Incident Site

- Analyze and evaluate the premises where the incident occurred. Such as:
 - Noteworthy problems in flooring, equipment, or hazards in immediate area
 - Cleanliness and general housekeeping -
 - ◆ Water and/or moisture (find source of moisture and remedy immediately)
 - ◆ Any objects near the injured person
- If a person was injured by falling objects, determine whether the objects were improperly stored or maintained.
- Take photos of area (**Note:** Do not start investigating the incident scene until after the injured person has been cared for and removed from the area.)
- Preserve pre-incident cleaning/maintenance/repair records for the area or equipment.

Step 6 – Complete an Incident Report

- At the time an accident/incident occurs, the Site Manager must complete the Incident Report Form in its entirety.
- Document the conditions found at the scene as promptly as possible in writing and with digital photos.
- Ensure you have gathered all the facts surrounding the incident.
- If an accident involved theft, assault, or other criminal action, notify the police.
- If property damage occurred, inform the third party to keep all receipts and estimates for the insurance claims adjuster.
- Complete the Incident Report Form in conjunction with the resident/guest. Be sure to note on the report any unusual circumstances that contributed to the incident (unsafe acts, alcoholic condition, age, weight, eyeglasses, etc).
- Include information about any injuries and/or property damage.
- Describe how the incident occurred.

If anything at the scene presents a danger, restrict access until the hazard has been eliminated.



Emergency Preparedness

- Fax or email a copy of the Incident Report Form to your Supervisor at Cambridge RES.
- Do not accept liability or agree to pay for any medical treatment or property damage.
- Do not give a copy of your claim report to anyone other than your insurance claims representative or attorney.
- Discuss the claim only with those persons who properly identify themselves as your claims representative, your attorney, fire or law enforcement officers.
- Media Relations — before speaking to any member of the Media (should they question you), please refer to the procedures regarding Media Relations, located in Chapter 2-Site Office Practices.

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eExchange - An online resource for all things Cambridge, including:

- **Bulletin Board** - Reminders, Announcements and Current Events from the Central Office
- **The Calendar** - A Calendar on the eExchange listing dates for completion of routine onsite practices for Affordable Housing, Safety, Conventional Housing, Yardi, CRES Events, and Holidays.
- **Cambridge University** - A catalog of resources for policy and processes.
- **Central Office** - Contact information for Central Office team including Supervisors, Accounting, Affordable Housing and more.
- **Filing Cabinet** - A resource for forms not available on Tenant Tech and IT help.

Tenant Tech - Online source for Forms

Yardi - Resident and Financial Management

Grace Hill - Online training center. All Cambridge Employees are required to take two courses per quarter including Fair Housing and Sexual Harassment courses one annually.

Office Depot - Online retail for Office Supplies

HD Supply - Online retail for Maintenance Supplies