Applications

How to Process Applications

1. Log into Rent Manager. In the upper right-hand corner, type “applications” into the search bar. Hit enter.
2. In the blue banner on the right-hand side, click the small box with the three columns. Find “Last Updated Date” from the Available Columns on the left, then click the blue arrow pointing to the right (third down). Click “Ok.” Click on the floppy disk icon to save.
3. Click twice on the column on the far right labeled “Last Updated Date” and scroll to the top. The most recent apps should be at the top, with older apps lower on the list.
4. Print the application.
    a. Check to see if the application itself has been printed:
        i. Find the “Prospects” tab under the “Home” banner. Begin typing the applicant’s name into the search bar. If there is more than one profile for the same applicant, check under the “History/Notes” tab to see which profile is the one with the started application and which one has the submitted application.
        ii. On the profile with the submitted application, under the “History/Notes” tab, check to see if the application has been printed.
        iii. If not, click “Add Note” in the bottom right-hand corner.
        iv. In the pop-up window, type PRINTED in the “Note” field.
        v. Click “Save and Close.”
    b. Under the “Applications” tab at the top, double click on the name at the top of the “Name” column. A window will open that has the summary and details of the application.
    c. In the lower right-hand corner, click “Print.”
    d. Another window will open. In the top left corner, click the small icon with the printer, and in the pop-up click “Print” again.
    e. Close the open window.
    f. On the “Details” side of the page, look for any small icons with orange to the far right of the screen. They will generally be pictures of IDs and pay stubs.
    g. If there are any, click on them to open the files.
        i. Check over each attachment before printing it:
            1. Is it legible? Make sure all the information on the document is easy to read.
            2. Is it current/valid? Ensure that IDs are not expired and that paystubs are from the last 8 weeks.
            3. Is it official? IDs need to be government-issued and pay stubs need to be *actual* pay stubs, containing the company name, date of pay, gross and net pay, and the applicant’s name and address. Screenshots of bank deposits, pay checks, and other unofficial documents are not acceptable.

    ii. If all of the requirements are met, click on the small printer icon on the bottom of the screen and then click "Print" in the pop-up. Print the documents in black and white.
    iii. If all of the above requirements are not met, do not print the attachment.

5. Interpreting the Application:
    a. Check that the applicant's name and birthdate match all IDs sent over.
    b. See if there are additional occupants and if they need to fill out applications or if they have already. If they have, print them off as well.
    c. Check to see if they list a pet and check Pet Screening to see if they created a profile
        i. Go to petscreening.com (easiest way is to use the bookmark on the browser).
        ii. Login: [REDACTED]
        iii. Password: [REDACTED]
        iv. Type in applicant's name to see if they have a profile and if it matches what they say on their application.
    d. Employment information should match any pay stubs they send in.
    e. Rental history needs to go back **7 years** and include address, dates lived there, landlord, and landlord contact info.
        i. If they have gaps they need to provide where they lived during that gap.
        ii. If they have no rental history, get residential history, including if they just lived at home with parents/family.
        iii. Be sure the rental history matches with their IDs and address listed on their pay stubs and IDs.
    f. Emergency contacts: each applicant needs to have two emergency contacts.
        i. They must be from a different household (other applicants are not acceptable)
        ii. They must be unique from other applicants (if two people are applying for one address, we must have a total of 4 contacts).
6. From the black binder, get an "Application Processing Form" sheet.
    a. Line 1: "Address Applying For:."
        i. In the Applications tab under "Property Short Name" is a number. That is the street number. If needed, type the number into the "Tenant" tab and look on one of the current tenants at the street name.
        ii. In the "Prospect Application Detail" window, it will be listed on the left in the blue banner that goes across the top of the page.
    b. Line 2: "List All Adult Names:"
        i. Look at the printed application. In the "Additional Occupants" section, they should have listed anyone else in the household.
        ii. Check the birth dates of the additional occupants. Anyone over the age of 18 needs to complete their own application.
        iii. List all adult names. Minors do not need to be listed.
    c. Line 3:
        i. Denote how many adults and minors are looking to move in.
        ii. About halfway down on the first page of the printed application, it asks if they have any pets. Check yes or no and fill in how many and what kind.

d. Line 4: If multiple adults in the same household have applied, write in the name of the person who submitted their application first. This line is not required.
e. Line 5: Look towards the top of the application to see if the applicant listed a maiden name or other previous name. Check box accordingly.
f. "Items to be Submitted with Application:"
    i. If there is only one applicant, check boxes accordingly as items are submitted. If a requirement has not been met, do not check the box.
    ii. If there are two or three applicants: ignore the lines with the boxes to check. Instead, go to the bottom under "Contact Notes." Write the names of the applicants across the top line with a little space between them. On the lines below, write out the items they are missing and add a check box. As they turn in their items, check off the boxes. No need to write down items they have already turned in. If it is not written, it is assumed it's submitted.
    iii. If there are more than three applicants, use one of the Circuit Court Info/Notes pages and write each name on its own line with several lines in between. Write down items needed, make check boxes, and mark them off as items are sent in.

7. Contacting the applicant: Applicants will need to be contacted to let them know what they are still missing from their apps and how to send the info over. Every time the applicant is contacted, write it down in the Contact Notes section. In the event that the section has the names of the applicants in it, write any contact made next to the name of the person contacted.
    a. There are two ways to contact the applicant regarding missing documents:
        i. Text:
            1. In the applicant's profile, click on the "General" tab.
            2. In the top right corner of the profile is their phone number with a small box to the left of it. Check the box and click "Save" in the bottom right-hand corner of the screen.
            3. In the search field, right click on the applicant's name.
            4. Click "Send Text" at the bottom of the list.
            5. Type in the text message (see example below) and click "Send."
        ii. Email:
            1. Copy the email address from the contacts tab and paste it into the email address bar. Subject: APPLICATION RECEIVED: [applicant's name]. Body: should include all the items they need to provide in a numbered list format. See example below.
            2. Copy sent email.
            3. In Rent Manager under the "History/Notes" tab, click "Add Email Note" in the bottom right.
            4. Paste email text into the field labeled "Note:"
            5. Save and close.
            6. NOTE: Each subsequent email—sent or received—with information regarding the application needs to be copied and pasted into the applicant's history on Rent Manager.

    b. Text example (edit and delete things that are unnecessary. Do not include email address if they are being contacted via email): Hello, we have received your application but there are still several things we need from you: 1) 2 forms of ID; 2) 8 weeks' worth of pay stubs; 3) 7 years of rental/residential history including addresses, dates, and landlord information; 4) a pet screening profile at petscreening.com, whether you have pets or not; 5) 2 emergency contacts; and 6) [additional applicant's name]'s application. Please send over all necessary documents and information to [REDACTED]. Thanks, Abode Properties.
    c. If the applicant does not respond within a day of the communication, call their phone to verify that it is an accurate and active number and to have them check their email/texts accordingly.

8. Each applicant will need to have a background check run on them through the circuit courts and sex offender websites.
    a. Get a "Circuit Court Info/Notes" form. If possible, use one form per application, separating it by applicant and database searched.
    b. Go to the Wisconsin circuit court website (bookmarked).
        i. Enter applicant's first and last name, click search.
        ii. If there are a lot of results, go back to the search page and add a middle initial or birthdate. Be sure the boxes to show results without those criteria included are checked.
        iii. Go through each result and check to see if it's that applicant.
        iv. Verifications (generally must match at least two criteria):
            1. Name matches.
            2. Birthdate matches IDs sent over.
            3. Address matches one listed on the rental history if it's a recent offense.
        v. Disqualifications:
            1. Middle initial doesn't match.
            2. Birthdate doesn't match IDs.
            3. Note: Addresses not matching is not an automatic disqualification. Applicants often omit an address in their rental history or it could be from before the history they provided. When [REDACTED] does the credit check, it will list all addresses, so if there are some that don't match, she can discuss it with the applicant.
        vi. If it is unclear if it is the applicant, write the offense down but put a question mark before the offense so that [REDACTED] knows it's uncertain.
        vii. When writing down the offense, include the date of the offense, the manner of the offense, and any repercussions including money due to the court or other third party (e.g. 7/15/24 Speeding $57 N/S or 6/13/21 resisting arrest, bail jumping).
            1. Shorthand explained:
                a. N/S = not satisfied – if the court is not paid money due.
                b. Satis = satisfied – if the defendant paid the court the money due.

c. Dis. R/I = Dismissed but Read In.

2. If the applicant is guilty, there is no need to write it down. Unless otherwise stated, [REDACTED] will assume they were found guilty.

viii. Write down each offense, even if it seems inconsequential.

c. Once everything from Wisconsin is written down, go to the Minnesota circuit courts and do the same thing.

d. Finally, check both the Wisconsin state sex offender registry as well as the national sex offender registry (Dru Sjodin). Any sexual offense is an immediate disqualification.

e. Go through each database for each applicant. If they have zero infractions, be sure to write down that there was nothing.

9. Pay Stubs and Figuring Out Income:

a. Be sure to verify the place they work is in the area. If it is not, ask the tenant (especially if it's a student) if it's a summer job and if they have a job lined up in the area.

b. If the applicant has been at their job(s) for more than 8 weeks, they must send over 8 weeks' worth of pay stubs. As stated above, pay stubs need to be *actual* pay stubs, containing the company name, date of pay, gross and net pay, and the applicant's name. Screenshots of bank deposits, pay checks, and other unofficial photos or documents are not acceptable.

c. If the applicant has not been at their job for 8 weeks, they will need to provide their employment information including the company, manager name and phone number, and an email to send an employment verification to (might be manager, might be HR).

i. To complete the employment verification:

1. Go to the applicant's prospect profile.
2. Click on "History/Notes."
3. Double-click the line that says they submitted the application.
4. Click print (print icon or ctrl+p).
5. Print only page 8.

ii. Get a Form 30: Authorization for Release of Income Information from Employer from the black binder.

iii. Place both the form and the applicant's release of information in the top-most tray of the printer, face up.

iv. On the home screen of the printer, choose "Send," then "Applications," then "Start." The documents will be emailed to the apply email.

v. Open the email.

vi. Right click on the forwarding arrow and choose "Edit Subject." The email will open in a pop-up.

vii. Send to: the email the applicant provided for their employer or HR.

viii. Subject: EMPLOYMENT VERIFICATION : [applicant first and last name].

ix. Body: Ask them to please fill out the form and return it as soon as possible. Be sure to name the applicant.

x. Delete the extra text underneath the sign-off (lines and the part that says "forwarded from" etc.).

xi. Send email.

xii. In the inbox, you can delete the email that was scanned from the printer. As long as the subject was edited in the forwarded email, the email returned from the employer will be in its own thread.
xiii. Note on the Application Processing Form the date it was emailed.

d. To determine income:
    i. From pay stubs:
        1. On the income sheet, write the pay date and net pay in the appropriate columns. Gross pay does not need to be included.
        2. Add the net pay of each paycheck to get the Total. Write it in the appropriate box.
        3. Divide the total by the number of pay stubs they provided. This provides an average. Do not include outlying payments.
        4. Multiply that by the number of pay stubs they receive each month (weekly = 4, every other week = 2, etc.).
        5. Multiply that total by 0.35 to get the amount of money they can afford to spend on rent each month according to our requirements.
    ii. From an employment verification form:
        1. Print the form they return.
        2. Multiply the number of hours they work per week times their rate of pay. This gives the gross amount they make per week.
        3. Take the gross amount they make per week and multiply it by 4 to get the gross amount they make per month.
        4. Multiply the gross amount they make per month by 0.8 to get approximately the net amount they make per month.
        5. Multiply the net total by 0.35 to get the amount of money they can afford to spend on rent each month according to our requirements.

e. Write their income on the appropriate line of the processing form.
    i. If there is only one applicant, write the equation of the net amount they make per month by 0.35 and the total (e.g. $2500 x .35 = $875).
    ii. If there is more than one applicant, write the net total they make per month for each person. Add all those together. Multiply that total by .35 to get the amount the household as a whole can spend on rent. Do not do each income individually. Include the initials by each total so [REDACTED] knows who makes what. (E.g. (T: $2500 + R: $3000) x .35 = $1925.)

10. Rental References:
    a. Determine which address goes with each landlord.
    b. Get a rental reference form from the binder ("For Previous Landlord Only").
    c. It is helpful to write the landlord's name and phone number at the top of the page.
    d. Fill out the applicant's name, rental address associated with that landlord, and the lease dates and rent amount information provided on their application.
    e. Call the phone number for the landlord.
        i. Some landlords are okay with answering the questions over the phone. Simply go through the form with them, verifying the info the applicant already

provided, including address, lease dates, and rent amount. The bottom two lines can be ignored.

   ii. Many landlords will require that you send them the form and the applicant's signed agreement to release of information. Ask for the email address to send the form to. Follow the procedure in 9.c.i. with the rental reference form. Print the completed form once it is returned and include it in the application.

f. Number each rental reference form on the top, with 1 being the most recent, 2 the next, etc. These numbers will coordinate with the numbers on the processing form.
g. Determine based on the reference the landlord gave it if it was a good or bad reference and write it on the appropriate line (Excellent, Good, Fair, Bad).
h. Family is not often called for rental references, but is not unheard of. Talk to [REDACTED] about whether or not they need to be contacted.
i. If there is a point where they were living with parents/family and do not have rental history, list that on the appropriate line.
j. If there is no rental history, simply write that on the line.
k. If there are multiple applicants, be sure to put their name/initials by the line coordinating with their reference. The order of the references is not as important as knowing which reference and landlord goes with which person.
l. If an applicant lists Abode Properties as a landlord, do not automatically assume we would rent to them again. Instead, search for the person in our system.
   i. By name:
      1. Open the "Tenant" tab under the top banner.
      2. At the bottom of the blue column on the left, make sure the box to the left of the "P" and "C" are checked. This ensures that both past and current tenants will be included in the search.
      3. At the top of the blue bar, click the button with the red funnel.
      4. Type in the applicant's name. It's a good idea to either choose the least common of their names and enter only that, not their whole name (i.e. if someone is named Obediah Smith, search for Obediah).
      5. Hit enter.
      6. Depending on the number of results, click through until you find the correct person.
   ii. By address:
      1. Open the "Tenant" tab under the top banner.
      2. At the bottom of the blue column on the left, make sure the box to the left of the "P" and "C" are checked. This ensures that both past and current tenants will be included in the search.
      3. Type in the number only of the address they provided.
      4. Tenants are listed with oldest at the top, newest at the bottom. Check to see the dates they lived at that address and look for the lease covering those dates.
   iii. If the applicant's name doesn't come up:
      1. Click on the "Contacts" tab.

        2. If the name is still not there, click the box next to “Show Inactive.”
        3. If none of that works, ask [REDACTED].
   m. Look over the account, focusing on any Balance Due (top blue banner) and reading through the History/Notes tab. Read the texts to see if there was any communication about lease violations. Reference the Rental Reference form to see what information to look for. The form does not actually need to be filled out. On the “Application Processing Form,” write the quality review of the tenant (Good, Bad, etc. as if it were a reference from another landlord).

11. Organizing the applications.
   a. Order of the application is as follows:
      i. Processing form.
      ii. Circuit court notes form.
      iii. Printed application.
      iv. IDs.
      v. Pay stub form.
      vi. Pay stubs/employment verification form.
      vii. Other documents relating to income such as letters stating they receive government assistance, child support, or other forms of income.
      viii. Rental references.
      ix. Additional documents such as their signed release of information.
   b. If there are multiple applications that all go together, separate them by applicant and order them accordingly. For example, do not put all pay stub information for all applicants together. Paperclip all of the papers that belong to one applicant together, then use an alligator clip to keep it all together.