

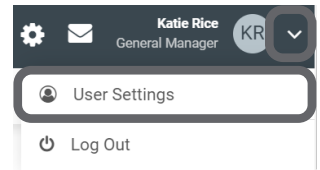


# Leasing Workflow & FAQ

## Things to Know

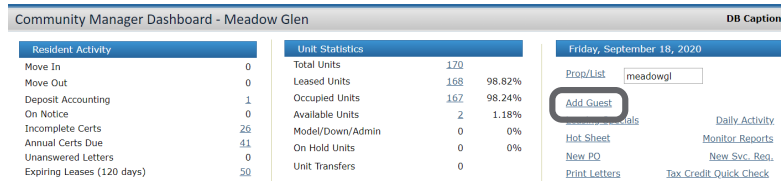
- Accurate screenings can take time to process. Always enter applications into Yardi and process for screening as soon as they are received (rental criteria and application must be signed / fees must be paid to process). If screening has taken over 3 days to process, please reach out with details through the Help Desk.
- Applications are Declined / Conditionally Approved / Approved based on the following scale:
  - 0.0 - 4.9 Declined
  - 5.0 - 6.9 Conditionally Approved (additional deposit)
  - 7.0 - 10.0 Approved

You have the option to receive email notifications based on system activity. To set these up for your individual access, navigate to your User Settings by clicking the drop down arrow in the top right side of your screen. Here you have the ability to customize dozens of notifications.

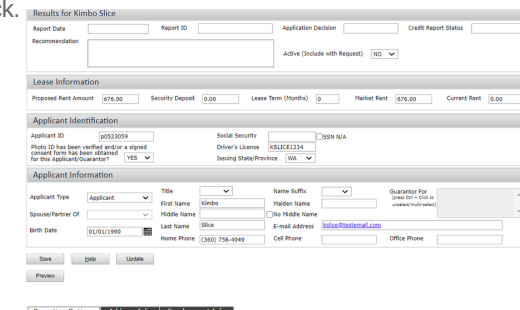


## Where to Enter an Application to Screen

Applicant information must be entered into Yardi as a Guest. Applications should **never** be entered directly into OnSite and should always be pushed through Yardi.



When you arrive at the Screening step and have entered all appropriate fields, select Credit Check. Then select the grey box in the "Select" column.



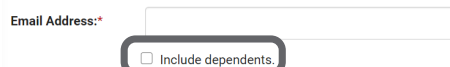
You are then directed to login to OnSite to complete the screening. Enter your OnSite credentials here.



Once screening is fully completed and approved, approve the account in both OnSite and Yardi.

## Adding Dependents

Dependents can be entered after selecting the 'Include Dependents' checkbox in OnSite if entering manually after initial application screening through Yardi workflow.



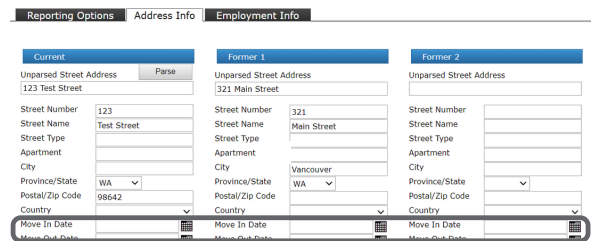
When adding in Yardi, do NOT select the Lessee checkbox for dependents.

## No Social Security Number

Applicants without social security numbers can still be easily screened. Instead of entering a social security number, enter 000-00-0000 when screening the applicant. Be sure to ensure as much other applicant information into the application prior to completing the screening.

## The "Country Field Error"

Error messages can be received if trying to fill in the Country field on the Screening page of applications. Always be sure that the Country field is left blank to avoid this issue.



Always be sure to Save any changes made to the Screening page prior to proceeding.

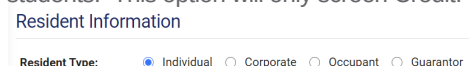
## Individuals / Corporate / Occupant and Guarantors

**Individual** - used for all occupants over the age of 18 years. This option will screen both Credit and Criminal.

**Corporate** - used to run a business application. This will screen the company's Credit and financial backing.

**Occupant** - used for occupants in Corporate units and live-in caregivers (NOT USED FOR ADDITIONAL OCCUPANTS IN A STANDARD UNIT). This option will screen only Criminal.

**Guarantor** - used for Guarantors on applications with full-time students. This option will only screen Credit.





# Leasing Workflow & FAQ

## Approving in Yardi

- Once the prospect has been approved in OnSite, return to the Prospect Guest Card screen in the Pending Applications menu in Yardi. Click into the Guest Card and select the "Approve" button.
- The Guest will now be listed as an Approved status. When you are ready to generate the Lease Agreement, select the "Execute Lease" button at the bottom of the Prospect Guest Card screen.
- This will bring you to the Resident screen and their status is updated to Future.

**Lease Status: *Approved***  
by Account Manager on 4/22/2019

Set To Pending    Lease Signed Offline

Application Status		
Action	Date	Agent
Submit Application	09/21/2020	Amy Johnson

Prospect Guest Card

First Name: Mickey MI  
Last Name: Mouse  
Address: [Redacted]  
City/State/Zip: [Redacted]  
Country: us  
Tel# Office-Home: (360) 451-4848  
DOB - DL#/State: 01/01/1990 MMOUSE123 WA  
Email: mmouse@testemail.com

Status: Approved  
Code: p0523495  
Property: meadowgl  
Unit: 02-213  
Unit Type: MG2x140%  
First Contact: Call  
Agent: Amy Johnson  
Source: Billboard  
Result: [Redacted]  
Date: 09/21/2020

Buttons: Ledger, Assign Unit, **Approve**, Deny, Cancel, Edit TIC, Adjust Move-In Date

Action	Date	Agent
Submit Application	09/21/2020	Amy Johnson
Application Approved	09/21/2020	Amy Johnson

Buttons: Ledger, Assign Unit, **Execute Lease**, Cancel, Blue Moon, Connect Utilities

Resident

First Name: Mickey MI  
Last Name: Mouse  
Address: [Redacted]  
City/State/Zip: [Redacted]  
Email: mmouse@testemail.com  
Alt. Email: [Redacted]  
Office: [Redacted]  
Home: (360) 451-4848  
FAX: [Redacted]

Resident ID: t0109286  
Property: meadowgl  
Unit: 02-213  
Prospect: p0523495  
Status: **Future**  
Legal: N/A

Buttons: Edit, Close, Help

## Processing Renewals

- Navigate to Recent Leasing Activity in OnSite and search for resident or apartment number.
- Click on appropriate resident's name to open their OnSite resident account. Click Renew Lease.

Lease Agreement

Community: Wing Pointe  
Apartment: 104  
Rent: \$1,395.00  
Security Deposit: \$500.00  
Lease Period: 02/01/2020 - 01/31/2021

Buttons: Change Apartment, Edit Lease Terms, **Renew Lease**, View History

- Enter renewal terms and click Continue. To bypass screening request, click Finish.

Lease Terms  
Leasing / Lease Terms

Buttons: Select Apartment, Resident Info, Screening, Lease Terms, **Finish**

- The file will then show as Renewed and lease can be fully generated.

## Processing Corporate Applications

- Corporation must complete Corporate Housing Application and pay corporate application fee (\$75.00). Application must include representative of company's contact information, as well as Occupants who will be residing in the apartment. All applications can be found in OnSite under Additional Forms on left menu.
- People residing in the apartment must also complete a full application (will only be run for Criminal) and pay application fee (site specific).
- Corporation should be entered into Yardi and 'primary' lease holder; Occupants should be entered into Yardi as additional Occupants. Attach all applications and documentation to account in Yardi.
- DO NOT PUSH SCREENING FROM YARDI.**
- Once Yardi is current with Corporation and Occupant information, submit Help Desk ticket including the Unit Number, Corporation Name and all intended Occupant names.
- Once notification is received back from Help Desk, generate lease for Corporate and Occupants in OnSite and send for signature.

## Need Help?

Direct all Screening and Lease Generation questions to the Help Desk

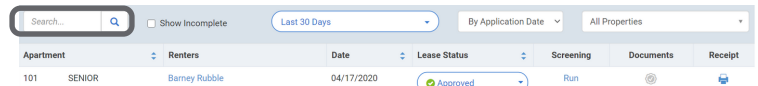
- OnSite - Leasing Questions
- OnSite - Screening Questions



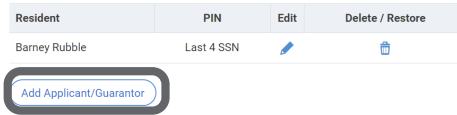
# Leasing Workflow & FAQ

## Adding Additional Roommates to Screening

- Search by apartment number on the Recent Leasing Activity dashboard.



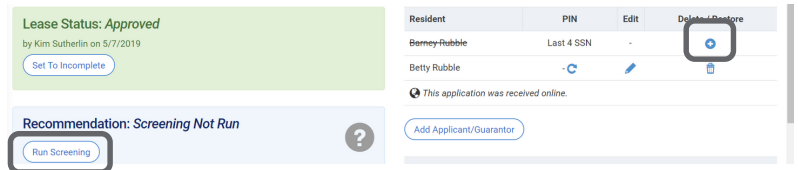
- Click on the existing Resident to open up their lease summary page.
- Click Add Applicant / Guarantor.



- Enter the new roommate's application
- To screen only the new roommate, delete the Current Residents to bypass screening (only applicable if screening was never run through OnSite). This can be done by clicking the trashcan by the resident you do not want to screen.



- Click Run Screening.
- Click the plus sign to restore each renter.



- Check the Recommendation for the updated screening results:
  - If the screening is Approved, add the new roommate to Yardi (be sure to attach screening results as Attachment in Yardi). Generate a new lease with all residents included.
  - If the screening is Approved with Conditions, verify additional deposit with Regional Manager. Generate a new lease with all residents included.
  - If the screening is Declined, delete the added roommate. You are not approved to move forward with the roommate addition.

## Leases for Employees Residing Onsite

- All occupants over 18 years of age (including employees) must be screened for both credit and criminal prior to residing onsite. All occupants are responsible for community-specific application / administration fees and must clear community-specific screening parameters.
- Prior to completing screening, Regional manager approval must be provided. If employee discount exceeds community budget, Vice President approval is also required.
- Once Regional Manager approval is received, submit Approval Form as well as all applications and proof of income through Help Desk using the Employee Application to Live Onsite category type. Please note that application(s) should be entered into Yardi, EXCLUDING income information (you can enter \$0.00 or N/A here instead).
- Once Help Desk fully screens application, you will be notified of screening result(s).
- Assuming application is approved, onsite team can search employee / additional occupants in OnSite to generate Lease Contract. When generating contract, click on the Edit button next to the employee's name. Scroll down to the Contact Person area and select the Include Employee Add:

Resident	PIN	Edit	Delete / Restore
Barney R. Rubble	Last 4 SSN		
Betty F. Rubble	Last 4 SSN		

Include Employee Addendum.

Lease Agreement	
Community:	Summit Townhomes
Apartment:	1456
Rent:	\$1,875.00
Security Deposit:	\$500.00
Lease Period:	01/07/2019 - 01/31/2020

- Additionally, enter the monthly discount for the employee residing onsite under Edit Lease Terms to accurately reflect on the Lease Contract.

Employee Discount:\*