

## INDEX – PROMAS TENANT FORMS

The following “types” of forms are contained within the *LandlordSource.com Forms, Letters, and Agreements, PROMAS VERSION*; the following is a brief explanation of the types of forms. To learn more about using the forms, consult the Using the Forms, Letters, and Agreements section in the front of this workbook. For PROMAS information on how to operate the PROMAS Software, consult the help function in PROMAS or call their technical support. It is a requirement for using this product to download the PROMAS, 6.9 version or higher.

<b>Form</b>	Microsoft Word® document giving instructions or filled in by user
<b>Fill-in</b>	This is a “protected Microsoft Word® document,” where information is inserted by tabbing from field to field; consult information on Fill-in Forms in Instruction Guide or consult Microsoft Word® Help.
<b>PROMAS Merge/Merge Fill-in</b>	This document merges with PROMAS software. Read all information included in the LandlordSource.com Instruction Guide, consult HELP in PROMAS or Microsoft Word®

#	Type	Name	Page	Description
T1	Form	Application instructions	1	Detailed instructions/requirements for completing the application-to-rent
T2	Form	Application	3	2-page standard application-to-rent
T3	Form	Cosigner application	5	2-page application for cosigner
T4	Form	Currently available	7	Computer fill-in form for current vacancy list to distribute; useful during showings
T5	Form	Coming available	8	Computer fill-in form for tenants on notice to distribute; useful during showings
T6	Form	Key checkout	9	Form to complete when giving a prospective applicant a key to see the property without an agent
T7	Form	Showing disclosure	10	Form for disclosing items to prospective tenants, such as a death, work to be completed, etc.
T8	Form	Application receipt	11	Receipt detailing costs of processing the application and asking for incomplete information. This is a requirement of some states, such as California
T9	Form	Verify applicant	13	2-page verification form to process an application and avoid writing all over the application, which many attorneys recommend.
T10	Form	Application status	15	1-page form to collect processing information on an applicant for <u>multiple tenants</u> to review the progress and determine the outcome.
T11	Fill-in	Verify income	16	1-page form to fax to an employer for employment verification
T12	Fill-in	Verify tenant history	17	1-page form letter to fax to a landlord/manager for verification of rental history
T13	Fill-in	Credit report request	18	Fill-in letter confirming a request for a credit report and putting the person requesting the report to contact the credit bureau for explanations
T14	Fill-in	Accept application	19	Fill-in 1-page letter accepting an applicant and includes instructions for renting
T15	Fill-in	Deny application	20	Fill-in 1-page letter denying a tenant application
T16	Fill-in	Offer to Rent	21	1-page form to take a holding deposit until executing the lease
T17	Fill-in	Complete renting	22	Formal notification to an applicant advising them what they must do to complete renting of the property

**Tenant Forms, Continued**

#	Type	Name	Page	Description
T18	Fill-in	Mail agreements	23	If approved applicants are out of town, this letter gives them instructions on how to complete renting of the property.
T19	Fill-in	Cancel rent offer	24	1-page notice to cancel the offer to rent because the approved applicant has not complied with the terms of renting the property
T20	Fill-in	Refund application fee	25	Fill-in letter for returning a processing fee when appropriate
T21	<b>Fill-in PROMAS</b>	Lease agreement	27	Fill-in form: detailed 6-page lease agreement which reverts to month-to-month
T22	<b>Fill-in PROMAS</b>	Month-to-month agreement	33	Fill-in form: detailed 6-page rental agreement for month-to-month
T23	<b>Fill-in PROMAS</b>	Maintenance addendum	39	6-page addendum for a rental agreement outlining maintenance procedures and tenant responsibilities
T24	<b>Fill-in PROMAS</b>	Check in addendum	45	This is a detailed 3-page addendum for a rental agreement for walk-through
T25	<b>Fill-in PROMAS</b>	Lead-based disclosure	48	Required lead-based paint agreement for a property built prior to January 1, 1978.
T26	<b>Fill-in PROMAS</b>	Pet addendum	49	Addendum detailing authorized pets and the tenant's responsibilities for their pet
T27	<b>Fill-in PROMAS</b>	Drug free addendum	50	Addendum detailing and emphasizing drug-free requirements.
T28	<b>Fill-in PROMAS</b>	Mold/mildew addendum	51	Addendum for a property that is subject to mold and mildew; it outlines items that a tenant is to do to prevent mold
T29	<b>Fill-in PROMAS</b>	Property disclosure	52	Addendum detailing any special disclosures such as a death in the property, etc.
T30	<b>Fill-in PROMAS</b>	Horse addendum	53	Addendum detailing the specifics of having a horse on the property
T31	<b>Fill-in PROMAS</b>	Cosigner agreement	54	Agreement when necessary for approved cosigner.
T32	<b>Fill-in PROMAS</b>	No smoking addendum	55	Addendum specifically detailing a no smoking policy in the property
T33	<b>Fill-in PROMAS</b>	Pool/spa/hot tub/sauna	56	Addendum detailing requirements or rules for a pool/spa/hot tub in the property
T34	<b>Fill-in PROMAS</b>	Furniture inventory	57	Inventory addendum for a furnished property for a rental agreement
T35	Form	Move in checklist	61	Move in checklist to note condition
T36	<b>Fill-in PROMAS</b>	Cancel rental agreement	62	Agreement to cancel right after signing and before tenant occupies.
T37	Form	ACH tenant form	63	Tenant authorization to transfer money out of their bank account for rent
T38	<b>Fill-in PROMAS</b>	Tenant welcome	64	Letter welcoming the new tenant and re-emphasize when rent is due and how to order maintenance
T39	Form	Tenant work order	65	This is a work order that a tenant can submit.
T40	Form	Work order (write in)	66	Work order to write in a tenant repair complaint
T41	Fill-in	Work order (computer fill in)	67	Work order to fill in a tenant repair complaint directly on the computer.
T42	<b>Fill-in PROMAS</b>	Late fee letter	68	Letter putting the tenant on notice that the rent was late and a late fee is due
T43	<b>Fill-in PROMAS</b>	NSF letter	69	Letter for contacting the tenant formally when unable to contact them by telephone regarding NSF funds

## Tenant Forms, Continued

#	Type	Name	Page	Description
T44	Fill-in <b>PROMAS</b>	Waive letter	70	Letter putting tenant on notice they have had an excellent payment record but that their rent was late. This waives the late fee 1 time only.
T45	Fill-in <b>PROMAS</b>	3 <sup>rd</sup> party check	71	Letter notifying the tenant the management company received a 3 <sup>rd</sup> party check and it is not acceptable
T46	Fill-in <b>PROMAS</b>	Noise warning notice	72	Letter putting the tenant on notice that they are making excessive noise and violating their rental agreement
T47	Fill-in <b>PROMAS</b>	Personal checks	73	Letter putting tenants on notice they have violated their rental agreement by disbursing non-sufficient funds; a personal check is not accepted
T48	Fill-in <b>PROMAS</b>	Eviction warning letter	74	Last ditch effort to coerce the tenant into paying rent after a notice to pay or quit has been served
T49	Fill-in <b>PROMAS</b>	Unauthorized resident	75	Letter regarding illegal resident
T50	Fill-in <b>PROMAS</b>	Unauthorized pet	76	Letter regarding illegal pet
T51	Fill-in <b>PROMAS</b>	Change terms	77	A formal letter notifying the tenant of a change in terms other than a rent increase
T52	Fill-in <b>PROMAS</b>	Letter of rent increase	78	A formal letter notifying the tenant of a rent increase
T53	Fill-in <b>PROMAS</b>	Tenant charge	79	Letter formally requesting a tenant to reimburse the owner for funds
T54	Fill-in <b>PROMAS</b>	Remove violent pet	80	Letter of demand that tenant remove a dangerous/violent pet
T55	Fill-in <b>PROMAS</b>	Pending work for lead-based paint	81	A letter detailing required information to the tenant for pending maintenance, which may have lead base paint, with a form for them to return
T56	Fill-in <b>PROMAS</b>	Request for survey appointment	83	Letter requesting a time to see the property and do a survey for the owner
T57	Fill-in <b>PROMAS</b>	Property survey	85	Detailed survey report to send to the owner; form is completed at the property, then filled in on the computer to produce a readable and professional report
T58	Fill-in <b>PROMAS</b>	Office policy change	90	Letter making the tenant aware that the management company changed a policy that could affect them
T59	Fill-in <b>PROMAS</b>	Repair deductions	91	A letter to tenants after they have deducted an expense from their rent ; details expectations in the future
T60	Fill-in <b>PROMAS</b>	Pest control work letter	92	Letter confirming the request of the tenant for pest control work and outlines their responsibilities
T61	Form	Tenant complaint form	93	Form giving the tenant an opportunity to air their grievances
T62	Fill-in <b>PROMAS</b>	Tenant violation	94	Letter after a violation of the rental agreement has been noted; and requests resolution
T63	Fill-in <b>PROMAS</b>	Owner selling	95	Owner has decided to sell; letter confirms the intention and that the rental agreement remains in effect
T64	Fill-in <b>PROMAS</b>	Mold response	97	Letter responding to a tenant complaint regarding mold in the property, and is under investigation

## Tenant Forms, Continued

#	Type	Name	Page	Description
T65	Fill-in <b>PROMAS</b>	Request new information	99	Letter when new information is needed from the tenant
T66	Fill-in <b>PROMAS</b>	Smoke alarm check	100	Letter to the tenants requesting they test their smoke alarm, report if it is malfunctioning and a form verifying they have tested it to be returned to the Property Manager
T67	Fill-in <b>PROMAS</b>	Cable/TV/satellite letter	101	Letter instructing tenants on requirements for cable/TV/satellite installation
T68	Fill-in <b>PROMAS</b>	New management	103	Letter for new tenants informing them the company has taken over management of their residence
T69	Fill-in <b>PROMAS</b>	Tenant death	105	Letter to remaining tenants acknowledging the death of a tenant and requesting information/resolution
T70	Form	Tenant survey	107	Survey of tenant opinions whenever the management company feels it is appropriate
T71	Fill-in <b>PROMAS</b>	Partial tenant notice letter	109	Letter acknowledging that a tenant has given notice, but not all; requests information from the remaining tenants
T72	Fill-in <b>PROMAS</b>	Remove tenant addendum	110	Addendum to rental agreement for removal of a tenant from the residence
T73	Fill-in <b>PROMAS</b>	Remove pet addendum	111	Addendum to remove pet from rental agreement, but not to refund deposit
T74	Fill-in <b>PROMAS</b>	Add tenant addendum	112	Addendum to rental agreement for addition of a tenant to the property
T75	Fill-in <b>PROMAS</b>	Add pet addendum	113	Addendum to rental agreement for addition of a pet to the property
T76	Fill-in <b>PROMAS</b>	No longer manage	114	Letter notifying residents the management company no longer manages the property for the owner.
T77	Fill-in <b>PROMAS</b>	Transfer security deposit	115	Transfer of security deposit from current management company to another party
T78	Fill-in <b>PROMAS</b>	Request lease renewal	116	Letter requesting the tenant sign a new lease
T79	Fill-in <b>PROMAS</b>	Lease renewal agreement	117	Addendum renewing a lease and also detailing any changes to the lease
T80	Fill-in	Notice to pay or quit	118	Notice to pay or quit when rent is unpaid.
T81	Fill-in	Notice of charges	119	Notice to pay charges such as late fees, non-sufficient fund fees, etc.
T82	Fill-in <b>PROMAS</b>	Notice of covenant	120	Notice to the tenant of violations to the rental agreement such as noise disturbance, lawn care, etc.
T83	Fill-in <b>PROMAS</b>	Notice of abandonment	121	Notice to post on the property informing the public and/or the tenants that the Property Manager and/or owner believe the property abandoned
T84	Fill-in <b>PROMAS</b>	Notice to enter dwelling	122	Notice to the tenants that Property Manager or Owner will enter the property at a designated time
T85	Fill-in <b>PROMAS</b>	Notice to vacate to tenant	123	Notice to vacate to tenants when such action is needed; and when tenants are on a month-to-month agreement or pending end of lease

## Tenant Forms, Continued

#	Type	Name	Page	Description
T86	Fill-in	Notice from tenant month-to-month	124	Form tenants fill out when they are on a month-to-month tenancy and want to vacate; advises them of obligations
T87	Form	Notice from tenant lease	125	A form tenants fill out when they are on a lease and want to vacate; advises them of the obligations to the lease
T88	Form	Release rental history	126	Form signed by tenants allowing the property management company to give out rental history and payments
T89	Form	Assign security deposit	127	Form for tenant's request that another tenant be given the full security deposit and authorizes it in writing
T90	<b>Fill-in PROMAS</b>	Acknowledge extension	128	Letter acknowledging extension of notice to or from tenant
T91	Fill-in	Mortgage co verification	129	Letter to the mortgage company requesting tenant history and informing them there is a fee due
T92	<b>Fill-in PROMAS</b>	Move out instructions	131	3-page letter to tenant advising them what to do when vacating the property and detailing move-out requirements
T93	Form	Key return	134	Key receipt for when a tenant brings in the keys when vacating
T94	Form	Move out checklist	135	Checklist of details to perform when a tenant moves
T95	<b>Fill-in PROMAS</b>	Full security deposit refund letter	136	Letter thanking them for their excellent tenancy and issuing a full refund
T96	<b>Fill-in PROMAS</b>	Partial security deposit refund letter	137	A letter detailing the partial security deposit refund and attaching bills to it
T97	<b>Fill-in PROMAS</b>	No refund security deposit letter	138	Letter detailing to the tenant why they are not receiving a security deposit refund and attaching bills to it
T98	<b>Fill-in PROMAS</b>	Second request for damages	139	Second request for funds due to the owner for damages after moving out.; before any further legal action taken
T99	<b>Fill-in PROMAS</b>	Security deposit settlement	140	This is agreement between owner and/or owner's representative and the former tenant regarding any security settlement dispute
T100	Form	Tenant recommendation	141	Form letter to give a written recommendation of a tenant

## INDEX - OWNER FORMS

#	Type	Name	Page	Description
L1	Fill-in	Management inquiry	142	Letter to send for management inquiry
L2	<b>Fill-in PROMAS</b>	Management agreement	143	4-page management agreement
L3	<b>Fill-in PROMAS</b>	Thanks management	147	Thank you letter for a new management account
L4	Form	Owner Information sheet	148	General information sheet for owner file to track valuable information
L5	Fill-in	Lease only agreement	149	4-page agreement for lease-only, not on-going management
L6	Form	ACH owner authorization	153	Form to complete authorization by the owner to transfer funds directly into their bank account
L7	<b>Fill-in PROMAS</b>	Request owner funds	154	Letter requesting funds from an owner for account
L8	<b>Fill-in PROMAS</b>	Request owner insurance	155	Letter requesting insurance from an owner for their property
L9	<b>Fill-in PROMAS</b>	Request owner W-9	156	Letter requesting completions of a W-9 form from an owner for their account
L10	<b>Fill-in PROMAS</b>	Request repair authorization	157	A general letter requesting repairs and funds from an owner for their property
L11	<b>Fill-in PROMAS</b>	Request management renewal	158	Letter informing an owner of mgmt fee increase
L12	<b>Fill-in PROMAS</b>	Management fee increase letter	159	Letter requesting funds from an owner for their account
L13	<b>Fill-in PROMAS</b>	Property rented letter	160	Letter informing an owner that the property has been successfully rented; details funds, lease, etc.
L14	<b>Fill-in PROMAS</b>	Tenant notice letter	161	Letter to the owner that a tenant has given a notice to vacate and detailing the steps that will be taken
L15	<b>Fill-in PROMAS</b>	Change office policy	163	Letter making an owner aware that there is a change of policy with management company
L16	<b>Fill-in PROMAS</b>	Client survey	165	Survey for owners to complete to monitor customer satisfaction and make
L17	<b>Fill-in PROMAS</b>	Mold letter	168	Letter notifies the owner that their tenant submitted a mold complaint and action is required immediately.
L18	<b>Fill-in PROMAS</b>	Transfer security deposit	169	Letter transferring the security deposit to owner at their request
L19	<b>Fill-in PROMAS</b>	Full lease payment	170	Letter puts the owner on notice that a prospective applicant/tenant wants to pay the entire amount of the lease, and put that owner on notice that there could be tax consequences
L20	<b>Fill-in PROMAS</b>	Year end policy	171	Letter that outlines the ending year information of company
L21	<b>Fill-in PROMAS</b>	Annual property survey	172	Letter accompanies an annual survey report of their property and the status of the maintenance.
L22	<b>Fill-in PROMAS</b>	Lead-based paint letter	173	A letter to accompany form for owner to sign for lead-based paint disclosure
L23	<b>Fill-in PROMAS</b>	Lead-based paint work	174	Letter requesting authorized for work that requires vendor qualified for lead-based work
L24	<b>Fill-in PROMAS</b>	Cancel management	175	Letter notifying an owner of termination of management
L25	<b>Fill-in PROMAS</b>	Close account letter	176	Final letter when ending management and transferring funds