

## New Move-In and Key Day Package Checklist

Name: \_\_\_\_\_ Provider: \_\_\_\_\_

Unit: \_\_\_\_\_ Move-in Date: \_\_\_\_\_

### STAGE 1 – Initial Contact

- Print screenshot of information section from ACORI (NRHS / ATH)
- Print “Details of Offer” email -or- “as per our conversation” email
- Complete Assessment of Eligibility for RGI Assistance form
- Arrange for Landlord / Credit Check (if applicable)
- Arrange for Interview / Orientation Session (if applicable)
- Send Membership Recommendation to PM for BOD approval (Co-op)
- “**Accept**” / ACORI (once applicant accepts the Offer)

**NOTE: make “comments” in ACORI throughout the application process**

### STAGE 2 – Approval / Proceeding with Offer

- Receive back - Landlord Check (if applicable) *\*Credit Check to be shredded*
- Receive back - Interview / OS paperwork (if applicable)
- Send Annual Income Declaration Form and letter
- Send OA to Member (Co-op)
- Send OA to PM once signed by Member / BOD to sign prior to Key Day (Co-op)
- Have Calculation Summary double checked and initialed (Co-ops include MF)
- Give copy of Calculation Summary to Finance (original for HH file)
- Receive from HH - Content Insurance Policy (if applicable)
- Receive from HH - Confirmation of Gas & Hydro (if applicable)
- Receive from HH - Pet Verification (if applicable) eg. proof of spay/neuter, vaccinations etc.
- Inform Finance - Tenant Pay (if applicable)
- Create HH file

### STAGE 3 – Move in Documents

- Send Move in Letter (copied on purple paper for the file)
- Send Key Day Package (see reverse for inclusions)

### STAGE 4 – After KD Appointment, get from PM:

- Signed Key Day Package (including OA / Co-ops)
- Signed Key Day Package (including Lease / Non-Profits)

#### **As well as:**

- Fire Safety Acknowledgment Form (PM has on site)
- Unit Inspection Form (PM has on site)
- Key Allocation Sheet (if applicable)
- Approved / Signed Membership Recommendation (Co-op)

### STAGE 5 – Housed

- “**Complete**” ACORI (on move in day)
- Email NRHS EA with “housed” details and request original application

### STAGE 6 – Final

- Receive original application from NRHS / ATH
- Staple Birth Certificates / Status documents to inside of blue folder
- Fasten all documents in HH file
- Get completed file approved by Supervisor

Standard Key Day Package includes: (Co-ops)

- Key Day Package Cover Page
- **\*\*Occupancy Agreement**  
*\*\* (OA sent upon acceptance of Offer; when returned, it is the 2<sup>nd</sup> page of the signed KD Pkg.)*
- Appendix A – Member Charges
- Appendix B – Household Members
- Appendix C – Housing Charge Subsidy Terms
- *Appendix D – Special Needs Unit Terms (if applicable)*
- Acknowledgement of Member Rights and Responsibilities
- Mold / Mildew Occupancy / Lease Agreement Addendum
- Tenant Pay / E-transfer information
- Multiple Sign off Sheet
- Cost of Maintenance Charges
- Maintenance – Who is Responsible

Standard Key Day Package includes: (Non-Profits)

- Key Day Package Cover Page
- Tenant Pay / E-transfer information
- Mold / Mildew Lease Addendum
- Cost of Maintenance Charges
- Maintenance – Who is Responsible
- LTB Form
- Lease Agreement

**Staple Key Day Package once signed and complete.**