

The background image shows a bedroom with a bed covered in a white sheet and a brown throw blanket. To the left is a wooden nightstand with a small lamp. On the wall are two framed abstract art pieces. A large woven basket hangs from the ceiling.

# The ORI Method<sup>TM</sup> Editable PDF Templates

*"Systematize your rental with ease."*

**Your Signature Course Companion  
for Clarity & Consistency**



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# *Editable Templates*

**Instructions:** These workbook templates are now editable PDF Smart Forms. You can type directly into them or print for your binder. The **5-Step Screen** and **Vetting Process** templates must be kept in your Management Binder to document a consistent written process—an important safeguard for Fair Housing Compliance. Refer to the corresponding workbook pages for recommended language and policy examples. All templates are reusable as you scale to more rooms.

## **Setup Templates**

- Furniture Audit (Essentials + Optionals), p15-16
- Furniture Budget Planner (Finalization), p17

## **Systematize Templates**

- House Rules, p22
- Communication Plan, p26
- Management Binder (Host), p27
- Welcome Binder (Housemates), p28

## **Launch Templates**

### **5-Step Screen (Visual Overview), p43**

- Screening Process, p42
- Pre-Screener Template, p44
- 15-Minute Discovery Call Script, p45
- Room Tour Guide, p46
- Next Steps (Handout), p47

## **Vetting Process**

- Follow-up Message Scripts, p48
- Rental Qualification Criteria Template, p49
- Landlord Screening Questions, p50
- Final Selection Process, p51
- Notifying Applicants Scripts, p52

## **Welcome Process: New Arrivals Templates**

- Welcome Tour (Move-in Day), p56
- Welcome Tour Checklist, p57-58
- Welcome Guide & Acknowledgement Sign-off, p59

**Disclaimer:** *These templates are provided for personal use only. They may be copied and reused for additional rooms but may not be shared, distributed, or resold.*

# *Furniture Audit (Essentials)*

Repurpose what you own first before buying new.

## **Instructions:**

1. **Check off:** Mark the items you already own.
2. **Measure:** Fill in measurements to ensure proper fit.
3. **Repurpose First:** Before purchasing, shop your home

Item	Measurement
<input type="checkbox"/> Mattress	
<input type="checkbox"/> Bedframe	
<input type="checkbox"/> Dresser	
<input type="checkbox"/> Nightstand	
<input type="checkbox"/> Rug	
<input type="checkbox"/> Lamp(s)	
<input type="checkbox"/> Curtain & Rod	
<input type="checkbox"/> Bedding	
<input type="checkbox"/> Artwork	
<input type="checkbox"/> Hangers	
<input type="checkbox"/> Refrigerator	
<input type="checkbox"/> Trash Bin	
<input type="checkbox"/> Mirror	
<input type="checkbox"/> Smart lock	

## *Furniture Audit (Optionals)*

Repurpose what you own first before buying new.

### Instructions:

1. **Check off:** Mark the items you already own
2. **Measure:** Fill in measurements to ensure proper fit.
3. **Repurpose First:** Before purchasing, shop your home

## Optional Items

Item	Measurement
 Chair	
 Desk	
 Shelf	
 Shoe Tray	
 Caddy	
 Fan	
 Curtain Sheers	
 Laundry Bag or Basket	
 Other:	
 Other:	
 Other:	
 Other:	
 Other:	
 Other:	

# Furniture Budget Planner

## Instructions:

1. **Check-off** items you already own (bring forward from prior table)
2. **Insert costs** of items to purchase
3. **Total** expenses at the bottom (total furniture cost for room rental)

Item	Already Have	Purchased	Cost
Bedframe			
Mattress (twin or full size)			
Mattress cover (zippered encasement)			
100% Cotton Sheets (white)			
Bedsread (neutral color)			
Pillows			
Nightstand			
Refrigerator (mini or mid-sized)			
Curtains (room darkening, neutral)			
Curtain Rods & Hardware			
Curtain Sheers (optional)			
Dresser (optional)			
Hangers (if there's a closet)			
Desk (optional)			
Chair (for desk) (optional)			
Towel set (optional)			
Lamp (for nightstand)			
Lamp (for desk) (optional)			
Small circulating fan (optional)			
Shelf (optional)			
Caddy for dishes/food (optional)			
Hooks (for towel, keys, jacket)			
Circle mirror (20-24")			
Shoe tray (optional)			
Smart Lock (digital, Wi-Fi enabled)			

**TOTAL SPENT: \$**

# House Rules

[illegible]

## Additional Policies

[illegible]

# Communications Plan

[illegible]



# Management Binder (Host)

## Table of Contents

[illegible]

# Welcome Binder (Housemates)

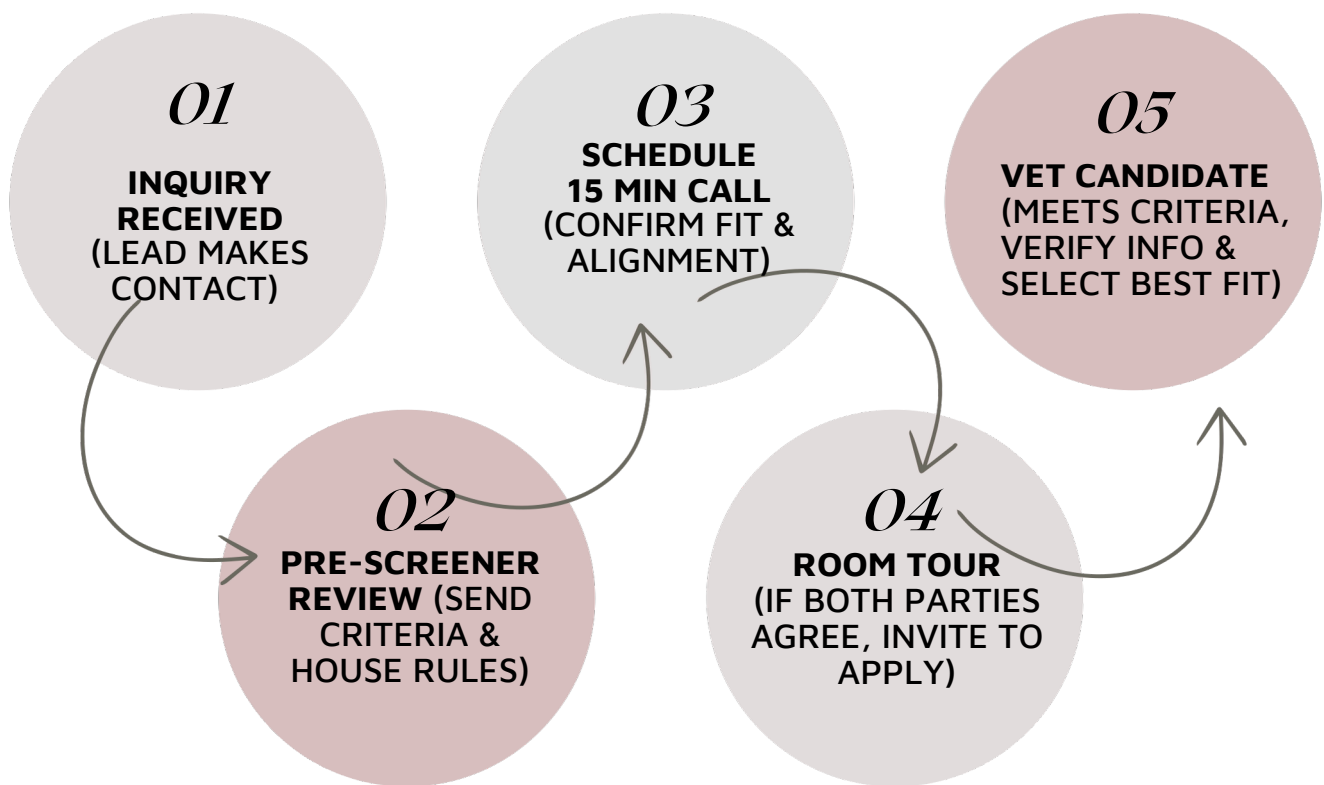
# Table of Contents

[illegible]

# The 5-Step Screen

This process ensures all applicants are screened fairly and consistently, in full compliance with the Fair Housing Act. This is a quick visual overview of the process for easy reference.

## FIVE STEP SCREEN



### Pro-Tip:

- Ask the same questions of every applicant.
- Share rules and qualifications upfront.
- Do not discuss personal traits unrelated to housing.
- Keep written records of your process to stay Fair Housing Compliant.

# 5-Step Screen Process (SOP)

## 1. Receive Initial Interest (Lead)

The inquirer messages you or responds to an ad.

## 2. Collect Pre-Screener Form

This form must be submitted before any phone call is scheduled.

## 3. Review Documents

If the Pre-Screener looks promising, send:

- **Rental Qualifications Criteria**
- **House Rules Addendum**

*(This allows prospects to review expectations and opt-out if not a fit.)*

## 4. Conduct 15-Minute Discovery Call

Confirm alignment, expectations and personality fit.

## 5. Host In-Person Room Tour

Assess comfort and mutual fit. If both parties agree, invite them to complete the online application. *(Only after steps 1-5 are completed.)*

---

### Important:

- No calls should be scheduled until the Pre-Screener is submitted.
- This protects your time and ensures only serious prospects move forward.
- Always follow the same documented process with every applicant to remain Fair Housing Compliant.

## Pre-Screener Template

Before any showings or Discovery call, all prospects must complete the free Pre-Screener (either by platform or email/text).

The following should be provided:

### Required Fields:

- Desired Move-In Date
- Monthly Income
- Estimated Credit Score Range
- Number of Occupants Requested
- Do you have pets?
- Do you smoke?
- Are you willing to do virtual showing if requested?
- Do you have any questions?

### Additional Questions:

- If approved, would you be able to pay the **first month's rent and security deposit within 3 days of acceptance?**

- Do you have any outstanding debts owed to a previous landlord, management company, or utility provider related to a prior residence?

- This rental is for  **person(s)**. If approved, who would be the occupant?

- Are you comfortable with the House Rules and Guidelines?

- Additional questions:

# 15-Minute Discovery Call Script

## Before the call:

Confirm applicant completed Pre-Screener and received the House Rules and Criteria.

## Opening (2 minutes)

*"Thanks for taking the time to chat today. I'd like to get a sense of your lifestyle and what you're looking for so we can see if this is a good fit. Did you review the documents I sent?"*

## Section 1: Lifestyle Fit (5 minutes)

1. What's your typical schedule like (work hours, sleep habits)?  
[Redacted]
2. How do you usually spend your downtime during the week?  
[Redacted]
3. Have you lived in shared housing before? What attracted you to this listing?  
[Redacted]

## Section 2: Expectations Alignment (5 minutes)

1. Were you able to review the House Rules? Any questions or concerns?  
[Redacted]
2. Are you comfortable with quiet hours, visitor limits, & shared space rules?  
[Redacted]
3. This is a sober-living environment — are you aligned with that?  
[Redacted]

## Section 3: Logistics Check (3 minutes)

1. When are you hoping to move in?  
[Redacted]
2. If approved, can you pay the 1st month's rent & security deposit within 3 days?  
[Redacted]
3. Do you have any questions for me?  
[Redacted]

## Closing (1 minute)

### • If moving forward:

*"Thanks again for your time! Based on our call, I'd like to invite you to schedule a room tour. I'll send over my availability."*

### • If not a good fit:

*"Thank you so much for your interest. At this time, I don't think this is the right match, but I wish you all the best in your housing search."*

# Room Tour Guide

**Goal:** Ensure the room is presented clean and consistent with your ad while assessing the applicant's fit and comfort level.

## Before the Tour

- Room is clean, bed made
- All surfaces wiped down
- Verify no personal items in the common areas
- Open curtains or blinds, turn on lights for brightness
- Have a printed handout ready

## During the Tour

### Start with a warm welcome:

*"This shared, peaceful home values respect, cleanliness, and privacy."*

### Show:

- The room (bed, storage, desk, fridge, Smart TV, AC -if included)
- Shared bathroom setup
- Kitchen: common area fridge, assigned pantry shelf
- Chore rotation expectations
- Laundry access and assigned Laundry day
- Outdoor space and parking (if applicable)

### Ask the Guest:

- "How does the space feel to you?"
- "Do you have any questions or concerns after seeing it in person?"

### Wrap-Up: (provide Next Steps handout)

*"Thanks for visiting! If you're still interested, I'll send you the link to apply via the management platform. They'll handle the background and credit check, and the application fee is paid directly through the platform."*

# ***Next Steps***

**Thank you for Visiting! Here's what's next:**

## **1. Apply Online**

The Application link will be sent after the tour —if both parties mutually agree to move forward

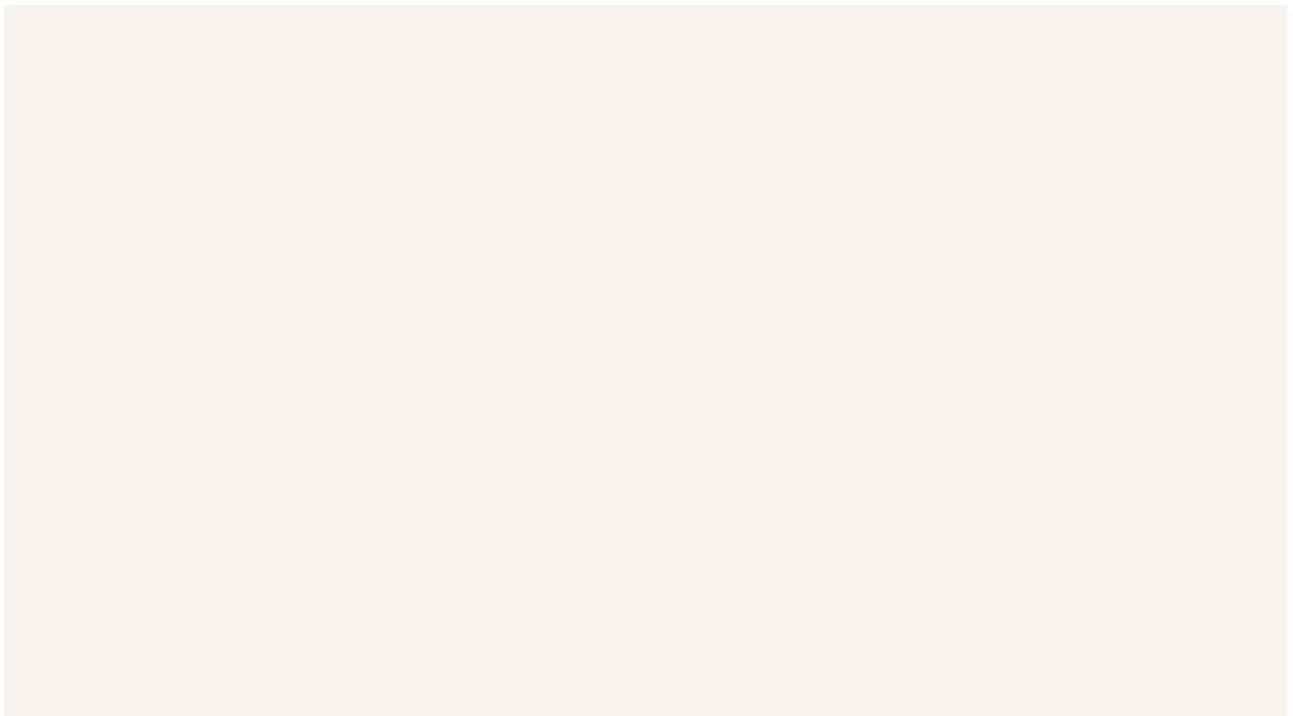
## **2. Approval Process**

- Application review and background
- Verify Reference(s) for prior rental(s)
- Verify employment
- First month's rent + security deposit due within 3 days of approval

## **3. Move-in Confirmation:**

Once payment is received (and cleared), your move-in date is secured.

## **4. Quick House Rules Recap:**





## Follow-up Messages Scripts

After the room tour, send a follow-up message to all visitors to keep the process consistent. Always provide written notice through the platform to establish a record of all interactions.

Here are a few templates to get you started:

- **If Moving Forward** (Invite to Apply):

*Hi [First Name], thanks again for the tour. If you're still interested, you can apply using this link: [Insert Link]. Let me know once it's submitted so I can keep an eye out.*

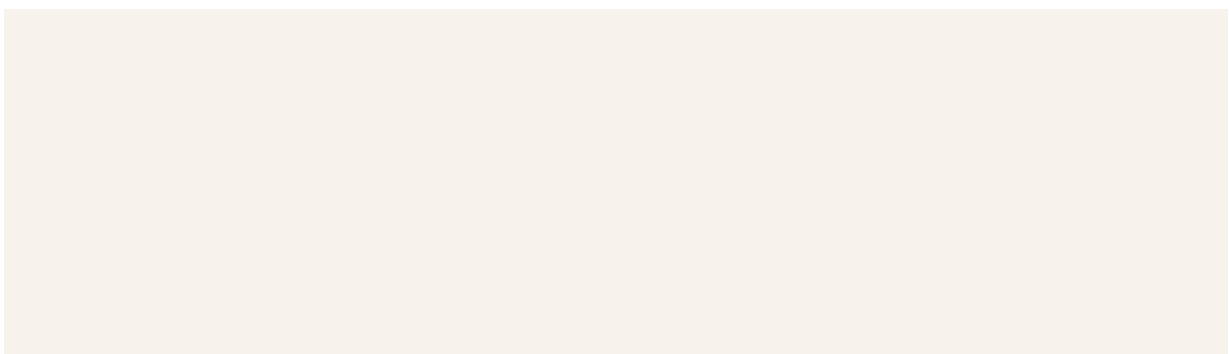
- **If Declining After Call or Tour:**

*Hi [First Name], thank you again for your time and interest. After reviewing everything, I've decided not to move forward. Wishing you all the best in your search.*

- **If You're Unsure Yet:**

*Hi [First Name], thank you again for connecting. I'm still reviewing a few candidates and should have a decision in the next couple of days. I'll follow up either way. Appreciate your patience!*

- **Additional Script:**



# Rental Qualification Criteria

Thank you for your interest in renting at

To ensure fairness and consistency, all applicants must meet standards will not be approved. We strongly encourage you to review the criteria carefully before submitting an application or paying any fees.

**Disclaimers:**

*Owner reserves the right to decline applications based on overall screening results. All applications comply with Fair Housing laws. Meeting the qualifications does not guarantee approval. All factors are considered during the review process.*

Income:	<div></div>
Credit Score:	<div></div>
Rental History:	<div></div>
Background Check:	<div></div>
Public Records:	<div></div>
Occupancy:	<div></div>
Valid Government ID:	<div></div>
Security Deposit:	<div></div>
Pet Policy:	<div></div>
Smoking Policy:	<div></div>
<div></div>	<div></div>
<div></div>	<div></div>
<div></div>	<div></div>

# Landlord Screening Questions

*(Use during tenant verification stage)*

## **Tenant Reliability & Payment History**

1. Did the tenant pay rent on time? If not, how often were they late?

2. Did they consistently pay the full rent amount?

3. Were there any bounced checks or payment issues?

## **Property Care & Rule Compliance**

1. Did the tenant take good care of the property?

2. Were there any damages beyond normal wear and tear?

3. Did they follow all lease terms (e.g., no pets, no smoking, etc.)?

## **Behavior & Conduct**

1. Were there any complaints from neighbors or other tenants?

2. Were there any disturbances, excessive noise, or other issues?

3. Did they comply with your rules?

## **Lease Fulfillment & Move-Out**

1. Did the tenant fulfill the full lease term?

2. Did they provide proper notice before moving out?

3. Was the unit left in good condition upon move-out?

4. Were there any security deposit deductions? If yes, why?

## **Would You Rent to Them Again?**

1. Would you rent to this tenant again? Why or why not?

## Process for Final Selection

*(Use after tenant verification stage)*

Once the prospect has completed the room tour and is invited to apply, the next step is to review their background and credit check. After receiving the application through your platform, carefully review the provided information.

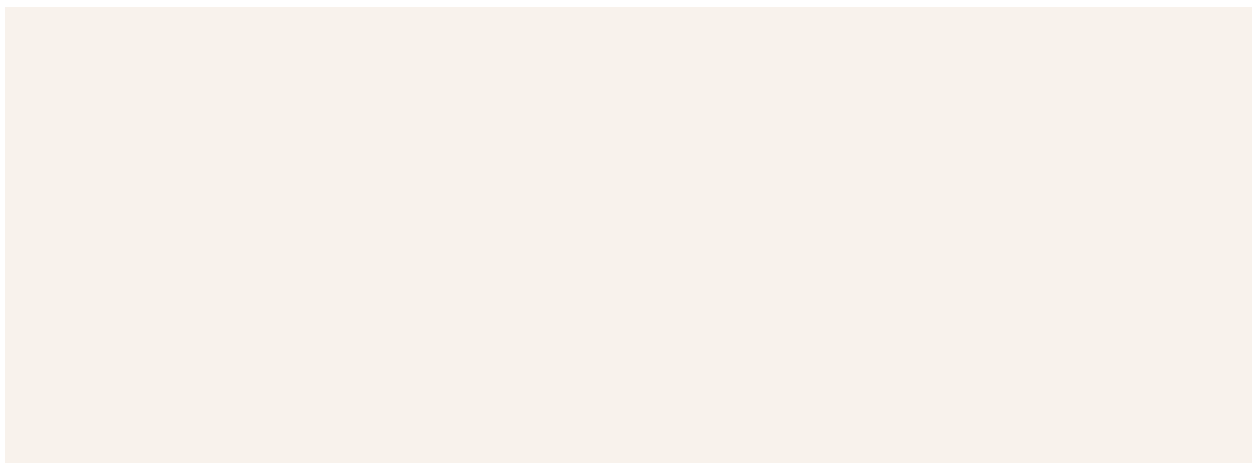
Since most platforms only show a limited history (typically 2-3 years), it's important to conduct a public record search to uncover any additional details:

- **State Case Search** to check for:
  - 1.past evictions
  - 2.history of violence
  - 3.signs of financial instability (e.g. judgements, liens)
- **Optional but Recommended:** Use a paid "People Case Search" service for a deeper review. These tools provide immediate, more comprehensive results.

Evaluate applicants who have completed the background, credit and case checks. Confirm employment through your platform, requesting pay stubs or contacting the employer directly if needed.

**Select the applicant who best meets your documented criteria** such as income, credit, rental history, and public record findings).

### Results:



# Notifying Applicants

*(After Final Selection)*

Once you've selected the best candidate, notify all applicants who submitted an application and payment for consideration. If the application was processed through your property management platform, you can typically use the built-in "Approve" or "Decline" buttons, which generate an automatic response.

If you're handling communication outside of a platform, use templates:

## Letter of Approval

Subject: Congratulations!

Your Application Has Been Approved Good Afternoon [Applicant Name], Congratulations! Your application for [insert property name/unit] has been approved. We're excited to welcome you to our community and look forward to making your experience as enjoyable as possible.

If you have any questions, please let us know. Thank you, and we look forward to your stay.

---

## Letter of Denial

Subject: Update on Your Application

Good afternoon [Applicant Name],

Thank you again for your interest in [unit/property name]. After a thorough review of your application and our qualification requirements, we regret to inform you that we are unable to move forward at this time.

As part of our standard screening process and in compliance with Fair Housing regulations, all applicants are evaluated based on the same set of criteria, including preliminary public record searches. Based on the information available, the application does not meet the requirements for this unit.

We appreciate your time and wish you the very best in your housing search.

# **Welcome Tour**

## **(Move-in Day Process)**

The Welcome Tour ensures a smooth transition for your new housemate. Unlike the initial prospect tour, this orientation is detailed and focused on house systems, expectations, and guidelines. It sets the tone for a positive experience and prevents misunderstandings later.

### **Why This Step is Required**

- Establishes clarity on **House Rules**, shared spaces and responsibilities.
- Demonstrates how to use household systems (laundry, appliances, thermostat, security)
- Confirms the **Move-in Checklist** and condition report for both parties. Builds rapport and a sense of community from Day 1

**Important Requirement** The Welcome Tour is **mandatory** and must be scheduled as part of move-in day. Communicate this clearly during the approval process:

**“Move-in is not complete until the Welcome Tour is finished.”**

*The following pages provide a detailed Welcome Tour checklist for Move-in Day. Print the following forms and use for each tenant/guest as part of your policy.*

# Welcome Tour Checklist

*(Complete on Move-in Day - Required Before Move-In is Finalized)*

Host Name:

Tenant Name:

Lock Code:

Move-in Date:

## Step 1: Welcome Center (Entryway)

☐☐☐☐☐

## Step 2: Living Room Overview

☐☐☐☐☐

## Step 3: Kitchen Orientation

☐☐☐☐☐

# Checklist for the Welcome Tour

(Continued)

## Step 4: Backyard/Outdoor Space

☐☐☐☐☐

## Step 5: Assigned Bathroom:

☐☐☐☐☐

## Step 6: Assigned Room:

☐☐☐☐☐

## Final Wrap-Up

☐ Confirm group communication channel access to:

☐ Discuss Parking (if applicable):

## Other:

☐☐

Tenant Signature & Date:

Host Signature & Date:



# Welcome Guide & Acknowledgement

## (Move-in Day)

*(Required Sign-off for Move-In Completion)*

### Welcome!

This guide is your quick reference for key expectations, rules, and policies covered during the Welcome Tour. Signing below confirms that you have received and reviewed all House Rules, understand household systems, and agree to follow the policies outlined in the Welcome Binder (including any future policy updates).

### Key Highlights

1. Security:

2. House Rules:

3. Kitchen:

4. Bathroom:

5. Room Rules:

6. Communication:

7. Cleaning:

### Tenant Acknowledgement

By signing below, I confirm that:

- I have completed the Welcome Tour.
- I have reviewed the Welcome Binder.
- I have reviewed and understand the House Rules and Policies.
- I agree to comply with all household systems, rules, and expectations.
- I agree to participate in the cleaning rotation and complete my assigned tasks.

**Tenant Signature & Date:**

**Host Signature & Date:**

A bedroom interior with a bed, nightstand, and framed art. The bed has a white sheet and a brown patterned blanket. The nightstand has a vase of white flowers. The wall has two framed abstract art pieces and a woven lampshade.

## The ORI Method™

Clarity. Confidence. Cash Flow

***“You don’t need more space —  
you just need a system.”***

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