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Creating an Application
To manually enter a new application, select Begin New Application from the Leasing menu.

To view an application that was created previously or one that was submitted online by a renter, select Recent Leasing Activity from the Leasing menu. See Recent Leasing Activity on page 19 and Pricing & Availability on page 18.

Selecting an Apartment
After beginning a new application, select the appropriate community (if you have access to multiple communities), the appropriate building within the community (if applicable) and the applicant’s chosen apartment.
If the applicant’s chosen apartment isn’t listed, select *Add Apartment*. If the applicant hasn’t chosen an apartment yet, select *Decide Later*.

Check *Don’t Screen this Applicant* if you are preparing a lease before screening.
Adding an Apartment
You can add an apartment by beginning a new application and selecting *Add Apartment* from the *Apartment* menu. Contact Client Services if you need to add a large volume of apartments for a lease up or newly acquired community.

![Apartment Information](image)

When selecting a *Floorplan Style*, note that a *Floorplan Style* is used to classify groups of apartments with certain traits in common, e.g. all of your one-bedroom apartments could be grouped under one floorplan style and all your two-bedrooms under another.

If the appropriate floorplan style isn’t listed, select *Create New Floorplan Style*. 
New Applicant Information
After selecting an apartment, you'll be taken to the *New Applicant Information* page. Use this page to enter the applicant’s personal information, current address and income.

When selecting an *Applicant Type* keep in mind:

- An *Individual* is anyone that will be physically living in the apartment and responsible for rent.
- A *Corporate* applicant type refers to the business that will be responsible for rent on a corporate lease.
- An *Occupant* is a minor or adult that will be physically living in the apartment, but is not responsible for rent. Different screening guidelines may apply.
- A *Guarantor* is an adult that is not physically living in the apartment, but is responsible for rent if the resident defaults. Different screening guidelines may apply.

If your applicant doesn’t have a Social Security Number (SSN), click *Use a Different ID*.

If applicable, you can enter the applicant’s Individual Taxpayer Identification Number (ITIN) or Canadian Social Insurance Number. Otherwise, click *None*. 
Paying the Application Fee
After entering the applicant’s information, you’ll need to submit payment for the application fee. On-Site can accept direct payment for your application fee via your credit card, the applicant’s credit card or the applicant’s bank account. If you’ve already collected an application fee you can click *Bill the Company* to be invoiced for the screening fee.

![Payment Options for Donald C. Earwig](image)

Screening the Applicant
After entering the applicant’s information and paying the application fee, you’ll be taken to the *Screening* page. Verify that you’ve entered the applicant’s information correctly and, if necessary, click the pencil to make changes.

<table>
<thead>
<tr>
<th>Screen</th>
<th>Applicant</th>
<th>SSN</th>
<th>Birth Date</th>
<th>Annual Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Casper Z. Kurtner</td>
<td>999-99-9999</td>
<td>2/6/1923</td>
<td>$100,000.00</td>
</tr>
</tbody>
</table>

Enter the lease terms and specify the referral source.

![Lease Terms](image)
If applicable, check the level of screening to run and confirm that you are authorized to screen the applicant.

![Screening Checklist]

Reviewing the Screening Results
Review the applicant’s score and overall recommendation.

![Overall Recommendation: APPROVE]

Review the pass or fail scoring factors. Click any factor to review the details of that particular factor. If there are any factors pending, the overall recommendation will not be finalized.

<table>
<thead>
<tr>
<th>Passed</th>
<th>Failed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income to Rent Ratio</td>
<td>None</td>
</tr>
<tr>
<td>Income after Debt</td>
<td></td>
</tr>
<tr>
<td>Derogatory Credit</td>
<td></td>
</tr>
<tr>
<td>Collections</td>
<td></td>
</tr>
<tr>
<td>Bankruptcies</td>
<td></td>
</tr>
<tr>
<td>Foreclosures</td>
<td></td>
</tr>
<tr>
<td>Mortgages in Default</td>
<td></td>
</tr>
<tr>
<td>Landlord Tenant Court</td>
<td></td>
</tr>
</tbody>
</table>

Review any warnings and take action as necessary.

![Warnings]

APPLICANT: Submitted Address Not On Credit Report - ACTION REQUIRED (Experian)
APPLICANT: Submitted Address Not In Records - ACTION REQUIRED (Experian)
APPLICANT: Invalid SSN
If you have permission, click on View Screening Details to view the complete rental report.

Lease Details

Making Your Decision to Rent
Once you’ve reviewed the screening results, use the Lease Details page to make your decision to rent: Approve, Decline or Cancel Application. You can get to the Lease Details page at any time by selecting Recent Leasing Activity from the Leasing menu and clicking the name of the appropriate renter. See Recent Leasing Activity on page 19.

Click View Screening to go back and review the screening results.

Viewing and Printing Documents
Lease documents appear under the Documents section. View and print documents by clicking the printer. See Generating and E-signing Lease Documents on page 13.
Editing Applicants
Use the Resident section to edit the applicant’s information, add an applicant or guarantor to the lease or delete an applicant or guarantor. See Adding Applicants and Guarantors on page 12.

Note that substantially changing the applicant’s information after screening has already been completed may require you to screen the applicant again at additional cost.

Editing Lease Terms
Use the Lease Agreement section to change the applicant’s apartment or edit the lease terms.
**Lease Comments**
Review lease comments and add new ones using the *Comments* section. Lease comments appear only to your leasing staff and do not appear on the lease documents.

![Comments example]

**Completing Verifications**
If you use On-Site’s reference check service, you can use the *Lease Details* page to send comments and verification related documents to the reference check team.

To fax a verification document, print the *Verification Document Fax Cover Sheet* and fax the document with cover sheet to (877) 329-6674.

![Verification Documents]

To upload a verification document, click add on the *Verification Documents* folder.
Verification documents can also be emailed to verifications@on-site.com.

To send a comment to the reference check team, click Add Verification Comment under the Verification Comments section. Comments entered here do not appear on the lease documents.

<table>
<thead>
<tr>
<th>Verification Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/12/2013 2:15 PM PDT</td>
</tr>
<tr>
<td>Adriana Anderson</td>
</tr>
<tr>
<td>Applicant’s want to move in ASAP!</td>
</tr>
<tr>
<td>6/12/2013 12:04 PM PDT</td>
</tr>
<tr>
<td>Adriana Anderson</td>
</tr>
<tr>
<td>UPLOADED DANIELS PROOF OF INCOME AND BOTH INFORMATION RELEASES 6/12/2013</td>
</tr>
</tbody>
</table>

Comments and status updates from On-Site’s reference check team appear on the Screening Details page.

To get to the Screening Details page, click View Screening.

**Overall Recommendation: APPROVE**

Click View Screening Details.

Comments appear under the Verifications section.

**Comments From On-Site.com**

6/10 3:31 PM PST (SKE) - Verbally verified correct.
If action is needed from your leasing staff to complete a reference check, a notification will appear on the Recent Leasing Activity page. See Recent Leasing Activity on page 19.

The verifications on this report have been delayed because:
Waiting for response on rental verification for Allyson M. Johnson
Need authorization form for Allyson M. Johnson – please fax to (877) FAX-ONSITE (877-329-6674)
Need additional information for Allyson M. Johnson: Please provide current pay stubs 1 month May

Adding Applicants and Guarantors
To add an applicant or guarantor, click Add Applicant/Guarantor.

Enter the new applicant or guarantor’s information.

If the applicant or guarantor that you are adding already exists within On-Site on a different lease, click Add Existing Resident/Applicant.
Use the search box to find the applicant or guarantor and click the person’s name.

If the terms of the lease are changing, be sure to click Edit Lease Terms on the Lease Details page and edit the terms accordingly.

If the new applicant is replacing an existing applicant, be sure to remove the old applicant by clicking the trashcan next to the old applicant’s name prior to printing the new lease documents.

Note that the overall score and recommendation for the lease will change once you’ve screened the new applicant/guarantor.

**Generating and E-signing Lease Documents**

**Generating Lease Documents**
To generate a lease, first navigate to the Lease Details page for the lease that you want to generate by selecting Recent Leasing Activity from the Leasing menu and clicking the name of the appropriate resident. See Recent Leasing Activity on page 19.
Print the *Lease and All Addenda*.

Use the *Name on Form* menu to change the name of the agent countersigning the lease.

If you need to make changes to the lease documents, click *Lease Details* and then click *Edit Lease Terms*. See *Editing Lease Terms* on page 9.

**E-signing Lease Documents**

Once your lease documents are generated and ready to be signed, click *Sign Document*.
Check the appropriate boxes to indicate which signers are present and which signers to invite by email, i.e. those that will sign remotely.

Corporate renters and renters with no ID number of any kind are assigned a unique PIN when you send the email invite. The PIN is used in place of an ID number to verify the renter’s identity and should be given to the renter over the phone.

The email invitation for renters signing remotely includes a link, which will take them to their lease documents. Signers are required to enter the last four digits of their SSN, Canadian social insurance number, tax ID number or the unique PIN that was assigned to them when you sent the invite.

Once the signing ceremony has begun, scroll through each page of the lease document to mark the pages as viewed.
Click on each signature and initial blank and use the menu to sign by hand or by click. If you choose to sign by hand, you can use your mouse or touchscreen device to draw actual signatures onto lease documents.

If you choose to sign by click, you can sign lease documents with a single click of your mouse. Neither method of signing is better than the other, nor does one method offer increased legal legitimacy—it’s just a matter of preference.

The symbols that appear on the page thumbnails denote the signing status.
If you fail to complete the lease signing, you can return to the signing page at any time by navigating to the appropriate Lease Details page and clicking the E-Sign seal on the Lease and All Addenda.

The seal denotes the progress of the signing ceremony.
Pricing & Availability
If you accept applications online and allow your applicants to apply to specific apartments, you’ll need to set your apartment pricing and availability.

To do so, select Available Apartments from the Leasing menu.

From the Available Apartments page, you can set availability, pricing, lease terms, specials and show or hide apartments.
Recent Leasing Activity
To view a pre-existing application or one that a renter has submitted online, select *Recent Leasing Activity* from the *Leasing* menu.

The *Recent Leasing Activity* page gives you an at-a-glance view of all your recent leases, both those that were created manually by leasing agents and those that were submitted online by renters.

Use the search box to find leases. You can search by apartment number or renter name.

Filter results using the menus.
Click the resident’s name or the magnifying glass to view the Lease Details page.

<table>
<thead>
<tr>
<th>Apartment</th>
<th>Resident(s)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 MM</td>
<td>Jordan Griffin</td>
<td>06/12/2013</td>
</tr>
<tr>
<td></td>
<td>Donald P. Griffin</td>
<td></td>
</tr>
</tbody>
</table>

Use the Status menu to quickly change the status and make a decision to rent. To help ensure accurate reporting, update the lease status immediately as the lease moves through the leasing workflow.

- **Pending**: A lease in which a decision to cancel, reject or approve the renter’s application has not yet been made.
- **Canceled**: A lease in which the renter’s application has been withdrawn.
- **Approved**: A lease in which the renter’s application has been approved for move-in.
- **Rejected**: A lease in which the renter’s application was rejected due to a failure to meet your rental qualifications.
- **Incomplete**: A system-only lease status for incomplete online applications.
- **Closed**: An approved lease in which no more action is necessary.