THE HOUSING SPECIALIST™

Apartment Viewing & Property Suitability Checklist

Prepare for viewings • Assess suitability • Record concerns • Decide next steps before moving toward an application

Professional Resource #13 • 6 Pages • 65+ Interactive Fields • Printable • Free
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Viewing Information

Specialist Name: _____ **Date of Viewing:** _____

Organization: _____ **Client / Case ID:** _____

Property Address: _____
_____

Landlord / Broker Name: _____ **Phone:** _____

Listed Rent: $_____ **Bedrooms:** _____ **Availability:** _____

1. Viewing Preparation

Complete these steps before the viewing. A prepared visit produces better information and protects professional credibility.

- ■ Appointment time, date and meeting location confirmed with landlord / broker
- ■ Access arrangements confirmed (keys, lockbox, super, virtual option)
- ■ Client informed of time, location and what to bring / expect
- ■ Household bedroom size and applicable rent limit verified from authorized records
- ■ Basic listing details reviewed (rent, size, floor, utilities, pets, laundry)
- ■ Any known accessibility or accommodation needs noted in advance
- ■ Printed or digital copy of this checklist ready for use during the visit
- ■ Clear plan for how the client will travel to and from the viewing

Important: A viewing is an informal assessment. It is not a substitute for an official housing inspection or program approval.

2. Apartment Observation Checklist

Record what you observe. Focus on facts. Do not diagnose structural or safety issues beyond your training.

Unit Interior

- ■ Entry door and locks appear functional
- ■ Living area is consistent with the advertised size
- ■ Kitchen present with sink, stove/oven and refrigerator space (or as advertised)
- ■ Bathroom(s) present and appear usable
- ■ Windows open/close and have screens where expected
- ■ No obvious active water leaks visible during the visit
- ■ No strong unusual odors that raise immediate concern
- ■ Electrical outlets visible and appear intact
- ■ Smoke detector(s) present (note if missing)
- ■ Carbon monoxide detector present where required (note if missing)
- ■ Flooring condition noted (major damage, trip hazards)
- ■ Walls and ceilings free of large holes or significant damage
- ■ Heating source visible (radiator, baseboard, forced air, etc.)
- ■ Adequate natural or artificial lighting for basic use

Common Areas & Building (if accessible)

- ■ Building entrance secure / intercom functional (if present)
- ■ Stairwells or elevator accessible and reasonably maintained
- ■ Hallways clear of major obstructions
- ■ No obvious accumulation of garbage or severe sanitation issues in common areas
- ■ Fire exits or emergency signage visible where expected

Visible Concerns to Record

Describe any observable issues (water stains, broken fixtures, missing detectors, accessibility barriers, etc.):

_____

_____

_____

_____

3. Property Suitability Assessment

Compare the apartment against the household's confirmed needs and priorities. This helps decide whether the unit is worth advancing to application.

Household Needs Comparison

Factor	Household Need	Unit Appears to Meet?	Notes
Bedroom size		Yes / No / Unclear	
Rent within limit		Yes / No / Unclear	
Location / transit		Yes / No / Unclear	
Accessibility needs		Yes / No / Unclear	
School / services access		Yes / No / Unclear	
Floor / walk-up ability		Yes / No / Unclear	
Pets (if applicable)		Yes / No / Unclear	
Utilities included		Yes / No / Unclear	

Overall Suitability Judgment (Specialist)

- ■ This unit appears suitable to advance toward application (subject to program requirements and client decision)
- ■ This unit has significant concerns and should not advance without further clarification
- ■ More information is required before a recommendation can be made

Brief rationale:

_____

_____

_____

4. Landlord & Broker Questions

Use these questions to verify key facts. Record the answers accurately. Do not treat verbal statements as final program approval.

Availability & Application

- Is the apartment still available? Confirmed move-in / availability date: _____
- What is the exact monthly rent and what does it include?
- What is the security deposit amount and any other move-in costs?
- What is the application process and required documents from the tenant?
- How long does the landlord typically take to review an application?
- Is the landlord familiar with CityFHEPS / FHEPS / Section 8 processes?

Property & Building Details

- Who is responsible for heat, hot water, cooking gas and electricity?
- Is there laundry in the unit or building? Cost if applicable?
- Are there any known upcoming repairs or renovations?
- What is the pet policy (if relevant to the household)?
- Who should be contacted for repairs after move-in?
- Is there a super or management company on site?

Program-Related Questions (ask carefully)

- Is the landlord willing to complete the required program forms / package?
- Does the landlord understand that an inspection may be required before approval?
- Who will be the main contact for the housing agency during the process?
- Are there any conditions the landlord wants clarified before proceeding?

Key answers / outstanding information:

_____

_____

_____

_____

5. Viewing Debrief & Action Plan

Immediately after the viewing, decide the next steps while the information is fresh. Assign clear responsibilities.

Client Feedback (record briefly)

Client's overall reaction: ■ Interested ■ Interested with concerns ■ Not interested ■ Needs time to decide

Main reasons given by the client:

_____

_____

Specialist Recommendation

- ■ Recommend advancing to application preparation
- ■ Recommend gathering more information before deciding
- ■ Recommend not advancing this unit

Reason:

_____

_____

Immediate Action Plan

Action	Responsible	Due By	Status
Confirm unit still available			
Request required landlord documents			
Verify rent vs. program limit			
Discuss concerns with client			
Escalate any fair-housing issue			
Update case notes / system			
Schedule follow-up			

Follow-up date agreed with client: _____

6. Reusable Viewing Summary

Use this page for additional apartments so you keep consistent records across multiple viewings.

Apartment #2 Summary

Address: _____ **Date:** _____

Rent: $_____ **Bedrooms:** _____

Landlord/Broker: _____ **Phone:** _____

Key observations / concerns:

_____

_____

Client reaction: ■ Interested ■ Concerns ■ Not interested | Specialist recommendation: ■ Advance ■ More info ■ Do not advance

Apartment #3 Summary

Address: _____ **Date:** _____

Rent: $_____ **Bedrooms:** _____

Landlord/Broker: _____ **Phone:** _____

Key observations / concerns:

_____

_____

Client reaction: ■ Interested ■ Concerns ■ Not interested | Specialist recommendation: ■ Advance ■ More info ■ Do not advance

Professional Safeguards

This checklist is a working tool for Housing Specialists. It does not replace an official housing inspection, program approval, or employer-required documentation.

- Record only factual observations. Do not diagnose structural, electrical or environmental hazards beyond your role.
- A positive viewing does not equal program approval. Landlord agreement, agency review, inspection (when required) and final authorization are separate stages.
- Protect client confidentiality. Transfer essential information into your organization's approved case-management system.
- If you observe possible source-of-income discrimination or other fair-housing concerns, document the facts and follow your organization's reporting procedures.