THE HOUSING SPECIALIST™

Housing Placement & Move-In Coordination Checklist

Coordinate the final stages after approval — lease, payments, keys, utilities, move-in day and early housing stability

Professional Resource #16 • 6 Pages • 50+ Interactive Fields • Printable • Free
Housing Specialist Hub → From Apartment to Placement

Placement Information

Specialist Name: _____ **Date:** _____

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

Property Address:

_____

Program: ■ CityFHEPS ■ FHEPS ■ Section 8 ■ Other: _____

Official Approval Date: _____ **Target Move-In Date:** _____

1. Placement Approval Verification

Confirm the decision and any outstanding conditions before coordinating the move. Approval, signed lease and actual move-in are separate milestones.

- ■ Official written approval received from the responsible agency
- ■ Approval conditions (if any) clearly identified and documented
- ■ Client has been notified of the approval with accurate information
- ■ Landlord / broker has been notified as authorized
- ■ Any remaining required documents or conditions listed
- ■ Supervisor informed if the case has special circumstances
- ■ Case notes and system status updated to reflect verified approval

Outstanding conditions / notes:

_____

_____

2. Lease & Payment Readiness

Coordinate signatures, payment authorizations and clear responsibilities before the client takes possession.

Lease Coordination

- ■ Final lease terms reviewed with the client (rent, term, responsibilities)
- ■ Client understands their portion of the rent (if any)
- ■ Lease signing date, time and location confirmed
- ■ All required parties available for signing
- ■ Copy of the signed lease obtained and stored in the authorized system
- ■ Any special lease clauses or house rules explained to the client

Payment & Financial Readiness

- ■ Security deposit / broker fee arrangements confirmed (who pays what)
- ■ First month's rent / proration understood by all parties
- ■ Program payment authorization status verified (if applicable)
- ■ Client knows how and when to pay their portion going forward
- ■ Any moving assistance or furniture support arranged (if available)
- ■ Client has a plan for initial household expenses (food, cleaning, basics)

Notes / outstanding payment issues:

_____

_____

3. Move-In Logistics

Organize keys, utilities, transportation and household essentials so the move itself is as smooth as possible.

Keys & Access

- ■ Key / fob / access arrangement confirmed with landlord or super
- ■ Date and time for key pickup agreed
- ■ Client knows who to contact if keys are not available on the day
- ■ Building entry instructions (intercom, door codes, etc.) provided

Utilities & Services

- ■ Electricity account setup or transfer arranged (if client responsibility)
- ■ Gas account setup or transfer arranged (if applicable)
- ■ Heat / hot water responsibility clarified
- ■ Internet / phone options discussed if needed by the household
- ■ Client knows how to report utility problems after move-in

Transportation & Moving Support

- ■ Moving date and time confirmed with the client
- ■ Transportation / moving help arranged (family, program, paid service)
- ■ Client has a plan for essential items on day one (bedding, toiletries, food)
- ■ Any accessibility or physical assistance needs addressed
- ■ Shelter / temporary housing discharge process coordinated (if applicable)

4. Move-In Day Verification

Confirm actual occupancy and address urgent problems on the day the client takes possession.

Day-Of Checklist

- ■ Client has received keys and gained access to the unit
- ■ Unit is vacant and ready for occupancy (as expected)
- ■ Basic functionality checked with the client (lights, water, heat if seasonally relevant)
- ■ Any immediate problems documented and reported to the landlord
- ■ Client knows the landlord / super emergency contact number
- ■ Client has a copy of the lease and important program documents
- ■ Case notes updated to reflect actual move-in date and any issues

Urgent Issues Observed on Move-In Day

Describe any problems that need immediate attention:

_____

_____

_____

Action taken / reported to:

_____

5. First 30 Days of Tenancy

Plan early follow-ups and identify housing-stability concerns while the client is still settling in.

Recommended Follow-Up Schedule

- Contact within 3–5 days of move-in (check access, utilities, immediate concerns)
- Follow-up around Day 10–14 (rent payment process, any landlord issues)
- Follow-up near Day 25–30 (overall adjustment, upcoming rent, support needs)
- Any additional check-ins required by the program or employer documented

Early Stability Check Topics

- Client is able to access and use the apartment without major barriers
- Utilities are functioning and accounts are in order
- Client understands the rent payment process and due date
- No unresolved conflicts with the landlord or neighbors have been reported
- Client knows how to request repairs
- Client has connection to any needed community or aftercare supports
- Any new barriers (income change, family situation, safety) identified early

Follow-up notes / concerns:

_____

_____

_____

6. Placement Closure & Quality Review

Document outstanding actions, close the placement phase cleanly, and capture lessons for future cases.

Closure Checklist

- ■ Actual move-in date recorded in the authorized system
- ■ All critical documents (lease, approval, payment confirmations) filed
- ■ Client has emergency and landlord contact information
- ■ Any open repair or utility issues have an owner and follow-up plan
- ■ Aftercare or stabilization referral completed (if required by the program)
- ■ Supervisor notified of successful placement (if required)
- ■ Case status updated to reflect housing placement / move-in complete

Quality Review — What Went Well / What to Improve

What worked smoothly in this placement:

_____

_____

What created delay or difficulty:

_____

_____

One improvement I will apply on the next placement:

_____

Professional Safeguards

This checklist is a working resource for Housing Specialists. It does not replace official program rules, employer policies, or legal requirements.

• Approval, signed lease and actual move-in are three separate milestones — each needs its own confirmation.
• Protect client confidentiality. Store documents only in authorized systems.
• Never promise payment dates or outcomes that have not been confirmed by the responsible agency.
• Escalate unresolved barriers (repairs, safety, payment issues) through your organization's established channels.
• Early follow-up after move-in is one of the strongest predictors of housing stability.