



## UMBRELLA PROPERTIES MANAGEMENT

P.O. Box 8516  
91120 N. Willamette St.  
Coburg, OR 97408  
541-484-6595 – Fax: 541-484-4395

Bend Office  
1315 SE Armour Rd. #1  
Bend, OR 97702  
541-728-0757 – Fax: 541-728-0678

### APPLICANT SCREENING POLICIES

Thank you for selecting Umbrella Properties, Mgmt. We hope we can assist you in finding a rental to meet your needs. Our screening process is listed below. Please be thorough as incomplete rental applications may be returned for completion causing a delay in processing. **On approval of the application, a \$10 application processing charge must be paid for each person 18 years of age, or older, and any minor living independently.** A second security deposit may be charged for a lack of rental references, income, or verifiable rental history, and/or a cosigner may be required. The second security deposit is **not** a last month's rent. Umbrella Properties' pet policies may vary by complex/unit. See the manager regarding allowable pets. Some properties may be within a 100 year flood plain.

***All money and move-in costs are to be paid by money order or certified funds. Please, no cash***

**1. Please fill out the application completely.** All phone numbers requested must be supplied. Occupancy is limited to 2 people per bedroom. Anyone over 18 years of age (or minor living independently) must be listed as an applicant and sign the application and rental agreement, unless a Personal Care Attendant. A non-refundable reservation deposit may be required on application approval. The reservation deposit may be applied to the move-in costs on lease initiation.

**2. Applicants that have not lived and/or worked within 100 miles for at least 6 months** may be required to pay an additional security deposit and/or obtain a qualified cosigner. This is not the last month's rent.

**3. Cosigner:** A qualified cosigner is one who: A. Fills out the cosigner sheet completely. B. Fills out an application providing proof of the source, stability and amount of income equal to 3 times the rent, and C. Is willing to sign the rental agreement and pay the rent if tenants fails to meet any obligations.

**4. Identification Verification:** All applicants over 18 years must provide 2 sources of current, valid, and verifiable pieces of identification. One of these must be a picture ID. Prior to approval, each applicant's picture ID must be presented to the manager in person.

**5. Demeanor:** An applicant's demeanor (attitude and behavior) during the screening process may be considered.

**6. Income:** The income shall be 2 ½ times the stated monthly rent. A **second security deposit is charged for any applicant filing Bankruptcy within the last seven years.** Verification of source, stability and amount of income must be provided. An additional security deposit and/or a qualified cosigner may be required for insufficient or unstable income.

**7. References:** All landlord and personal references must be accurate and verifiable. Three attempts will be made to verify your references before going to the next application. A negative reference may result in application denial. Please supply five years of rental history.

**8. Judgments/Collections:** The landlord may make a search of court records for each applicant. Applications may be denied for FED's, unsatisfied judgments, misdemeanors, or felony convictions. Applicants may be asked to provide a copy of their police record, obtained at their own cost. A police report may be required from each city where you have lived. If applications containing the above problems are approved through satisfactions, applicants may be required to pay an additional security deposit and/or obtain a qualified cosigner. [ ] < Put an "X" here if you are a "Personal Care Attendant". [ ] < Put an X here if you are applying for temporary occupancy **(tenant in unit required)**.

**9. Section 8:** Section 8 applicants must provide written verification of participation in a valid program.

**10. Credit Check:** A credit check may be run. A factor shall be applied against the number of accounts and outstanding balances. A debt to income ratio of 50-60 percent may be allowed.

**11. Criminal Conviction Criteria:** Upon receipt of the Rental Application and screening fee, Owner/Agent will conduct a search of public records to determine whether applicant or any proposed resident or occupant has a "Conviction" (which means: charges pending as of the date of the application; a conviction; a guilty plea; or no contest plea), for any of the following crimes as provided in ORS 90.303(3): drug-related crime; person crime; sex offense; crime involving financial fraud, including identity theft and forgery; or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of residents, the landlord or the landlord's agent. Owner/Agent will not consider a previous arrest that did not result in a Conviction or expunged records.

If applicant, or any proposed occupant, has a Conviction in their past which would disqualify them under these criminal conviction criteria, and desires to submit additional information to Owner/Agent along with the application so Owner/Agent can engage in an individualized assessment (described below) upon receipt of the results of the public records search and prior to a denial, applicant should do so. Otherwise, applicant may request the review process after denial as set forth below, however, see item (c) under "Criminal Conviction Review Process" below regarding holding the unit.

A single Conviction for any of the following, subject to the results of any review process, shall be grounds for denial of the Rental Application. a) Felonies involving: murder, manslaughter, arson, rape, kidnapping, child sex crimes, or manufacturing or distribution of a controlled substance.

b) Felonies not listed above involving: drug-related crime; person crime; sex offense; crime involving financial fraud, including identity theft and forgery; or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of the residents, the landlord or the landlord's agent, where the date of disposition has occurred in the last 7 years.

c) Misdemeanors involving: drug related crimes, person crimes, sex offenses, domestic violence, violation of a restraining order, stalking, weapons, criminal impersonation, possession of burglary tools, financial fraud crimes, where the date of disposition has occurred in the last 5 years.

d) Misdemeanors not listed above involving: theft, criminal trespass, criminal mischief, property crimes or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of the residents, the landlord or the landlord's agent, where the date of disposition has occurred in the last 3 years.

e) Conviction of any crime that requires lifetime registration as a sex offender, or for which applicant is currently registered as a sex offender, will result in denial. Criminal Conviction Review Process. Owner/Agent will engage in an individualized assessment of the applicant's, or other proposed occupant's, Convictions if applicant has satisfied all other criteria (the denial was based solely on one or more Convictions) and:

(1) Applicant has submitted supporting documentation prior to the public records search; or (2) Applicant is denied based on failure to satisfy these criminal criteria and has submitted a written request along with supporting documentation. Supporting documentation may include: i) Letter from parole or probation office; ii) Letter from caseworker, therapist, counselor, etc.; iii) Certifications of treatments/rehab programs; iv) Letter from employer, teacher, etc. v) Certification of trainings completed; vi) Proof of employment; and vii) Statement of the applicant. Owner/Agent will: (a) Consider relevant individualized evidence of mitigating factors, which may include: the facts or circumstances surrounding the criminal conduct; the age of the convicted person at the time of the conduct; time since the criminal conduct; time since release from incarceration or completion of parole; evidence that the individual has maintained a good tenant history before and/or after the conviction or conduct; and evidence of rehabilitation efforts. Owner/Agent may request additional information and may consider whether there have been multiple Convictions as part of this process. (b) Notify applicant of the results of Owner/Agent's review within a reasonable time after receipt of all required information. (c) Hold the unit for which the application was received for a reasonable time under all the circumstances to complete the review unless prior to receipt of applicant's written request (if made after denial) the unit was committed to another applicant.

Any information provided (verbal or written) that is incomplete, inaccurate, negative, unverifiable, or falsified may be grounds for the denial of the application or subsequent termination of tenancy. Applicants may be liable for any loss or damages resulting from false information. **We have read and understand the above:**

Applicant 1 \_\_\_\_\_ Applicant 2 \_\_\_\_\_

Date & Time Received By Office \_\_\_\_/\_\_\_\_/\_\_\_\_, \_\_\_\_:\_\_\_\_ ☐ a.m. ☐ p.m.

## RENTAL APPLICATION

Rental Unit Address Preferences \_\_\_\_\_ City \_\_\_\_\_

Preferences – Check All that Apply:

☐ Duplex ☐ 2-Story Duplex ☐ Apt ☐ 2-Story Apt ☐ House ☐ 1-Bedroom ☐ 2-Bedroom ☐ 3-Bedroom

Desired Rent Range \_\_\_\_\_ Maximum Rent Amt. \_\_\_\_\_ Preferred Move-In Date \_\_\_\_\_

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The application processing charge of \$10/applicant is to be paid on application approval before execution of the rental agreement. The process followed in screening is to review public records, criminal records, employment verifications, and landlord/personal references. The applicant has a right to dispute the accuracy of any information from public or criminal records. Said records may be accessed at any county courthouse. The landlord is not required to disclose all the details of the application screening.

### RENTAL INFORMATION (Applicant information) PLEASE PRINT

Last First Middle

#1 Applicant Name \_\_\_\_\_ Birth Date \_\_\_\_\_ SSN \_\_\_\_\_

#2 Applicant Name \_\_\_\_\_ Birth Date \_\_\_\_\_ SSN \_\_\_\_\_

Indicate number, breed and age of all pet/s: \_\_\_\_\_

Applicant #1 Phone: \_\_\_\_\_ Applicant #2 Phone: \_\_\_\_\_

Applicant #1 Email: \_\_\_\_\_ Applicant #2 Email: \_\_\_\_\_

#1 Driver's License or other picture ID # \_\_\_\_\_ ST \_\_\_\_\_ 2nd ID \_\_\_\_\_

#2 Driver's License or other picture ID # \_\_\_\_\_ ST \_\_\_\_\_ 2nd ID \_\_\_\_\_

# of vehicles \_\_\_\_\_ Make, year, color & lic #'s \_\_\_\_\_

COMMENTS \_\_\_\_\_

Please list Oregon counties where you have resided \_\_\_\_\_

1. How many people will be living in the unit? \_\_\_\_\_
2. Why are you moving from your current address? \_\_\_\_\_
- ( ) yes ( ) no 3. Do you have good landlord/mortgage history? \_\_\_\_\_
- ( ) yes ( ) no 4. Have you ever received a notice to move? Please explain \_\_\_\_\_  
If yes, was it for: ( ) cause ( ) no cause ( ) 72 hour notice ( ) Other \_\_\_\_\_
- ( ) yes ( ) no 5. Have you ever had problems paying your rent on time? \_\_\_\_\_
- ( ) yes ( ) no 6. Do you currently owe money to a landlord? \_\_\_\_\_
- ( ) yes ( ) no 7. Do you have any unsatisfied small claims or other money judgments. If yes, explain \_\_\_\_\_
- ( ) yes ( ) no 8. Have you ever filed for bankruptcy? If yes, year \_\_\_\_\_
- ( ) yes ( ) no 9. Have you ever had a claim filed against you for non-payment of rent, cleaning, or damage charges to a rental unit? Has this been satisfied? \_\_\_\_\_
- ( ) yes ( ) no 10. Do you or any persons that will be living with you currently use illegal drugs, or have you/they ever been arrested or convicted of theft, assault, injuring people or damaging property, manufacture and delivery of a controlled substance, or for any other felony or misdemeanor? If yes, please explain. \_\_\_\_\_
- ( ) yes ( ) no 11. Have you ever used any names other than those listed above (maiden, nickname, alias, other marriages, etc.)? Please list: \_\_\_\_\_
- ( ) yes ( ) no 12. Are you on a HUD Section 8 program? If yes please list which program \_\_\_\_\_

### PERSONAL REFERENCES

1. Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

2. Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

In Case of Death or Emergency, Please Notify:

Name: \_\_\_\_\_ Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_ Comments \_\_\_\_\_

**EMPLOYMENT/INCOME INFORMATION**

**Applicant #1:** Present Employer/Income \_\_\_\_\_ How Long \_\_\_\_\_

Address City \_\_\_\_\_ State \_\_\_\_\_

Phone \_\_\_\_\_ Supervisor \_\_\_\_\_

Job title \_\_\_\_\_ Take Home/month \_\_\_\_\_

**Applicant #2:** Present Employer/Income \_\_\_\_\_ How Long \_\_\_\_\_

Address City \_\_\_\_\_ State \_\_\_\_\_

Phone \_\_\_\_\_ Supervisor \_\_\_\_\_

Job title \_\_\_\_\_ Take Home/month \_\_\_\_\_

**Other Sources of Income:** (List name, address, phone #, and amount to be verified or bring written verification of said income).

**RENTAL HISTORY**

1. Present Address \_\_\_\_\_ City/State \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Landlord \_\_\_\_\_ Parent ( ) Owner ( ) Manager ( )

Landlord Address \_\_\_\_\_ Phone: \_\_\_\_\_

2. Previous Address \_\_\_\_\_ City/State \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Landlord \_\_\_\_\_ Parent ( ) Owner ( ) Manager ( )

Landlord Address \_\_\_\_\_ Phone: \_\_\_\_\_

3. Previous Address \_\_\_\_\_ City/State \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Landlord \_\_\_\_\_ Parent ( ) Owner ( ) Manager ( )

Landlord Address \_\_\_\_\_ Phone: \_\_\_\_\_

4. Previous Address \_\_\_\_\_ City/State \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Landlord \_\_\_\_\_ Parent ( ) Owner ( ) Manager ( )

Landlord Address \_\_\_\_\_ Phone: \_\_\_\_\_

Have you ever rented from a management company, person, owner, etc. that you have not listed on the application?

If so, please list their name/s, address and phone number/s \_\_\_\_\_  
\_\_\_\_\_

**SURVEY:** Please indicate below how you first heard of UMBRELLA PROPERTIES MANAGEMENT (i.e., friend, newspaper, agency, phone book, etc.):  
\_\_\_\_\_

**OTHER COMMENTS:** \_\_\_\_\_  
\_\_\_\_\_

We, the undersigned, have read and understand the terms explained on this application. With our signatures below, we give our permission for the release of ALL necessary landlord, employment, personal verification or screening of the information provided on this application, and for issuing future references after the termination of our tenancy. We swear that all of the information given is correct to the best of our knowledge. We agree to pay to UMBRELLA PROPERTIES MANAGEMENT. or to its authorized Agent or Assigns any balance due, fees, interest, or legal costs, and disbursements due for the collection of any costs incurred due to the violation of agreements, policies, or terms of the application, rental agreement, site rules, pool rules, or amendments given. We understand that our names and /or files may be placed in a negative reference data base and /or sent to a professional collection agent. This could cause a negative response to any future rental references or credit ratings given by UMBRELLA PROPERTIES MANAGEMENT or its assigns/agents.

\_\_\_\_\_  
#1 Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
#2 Signature

\_\_\_\_\_  
Date

\*\*\*\*\*

**FOR OFFICE USE ONLY**

APPROVED BY \_\_\_\_\_ Date \_\_\_\_\_

NOT APPROVED BY \_\_\_\_\_ Date \_\_\_\_\_

REASON \_\_\_\_\_

**CIVIL COURT RECORDS**

DATE SEARCHED: \_\_\_\_\_ [ ] CASES FOUND [ ] NO CASES  
FOUND

COUNTIES SEARCHED: \_\_\_\_\_

**APPLICATION PROCESSING CHARGE**

(\$10/applicant excluding minors, unless renting independently)

Tenant #1 \_\_\_\_\_ Paid (date& time) \_\_\_\_\_

Tenant #2 \_\_\_\_\_ Paid (date & time) \_\_\_\_\_