Refugee Housing
SOLUTIONS

Virtual Rental Walkthroughs: A Case Manager's Guide

Leading a Rental Property Walkthrough Virtually

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"Virtual Rental Walkthroughs: A Case Manager's Guide" offers resettlement staff key information and tools to assist newcomer clients during the rental property walkthrough process using Virtual Case Management (VCM). In this process, the newcomer conducts an in-person tour of a prospective rental unit while the case manager or other housing staff provide virtual support. Tools like FaceTime, Zoom, or TEAMS allow VCM for walkthroughs, helping to overcome logistical challenges, time constraints, and scheduling conflicts. This approach also reduces workload, saves time, and lowers travel costs.

This guide is organized into three phases: Before, During, and After the walkthrough – with each phase offering practical tools and guidance.

BEFORE

Phase I: Preparation and Planning

As with regular case management, with VCM case managers prepare clients by discussing prescreening requirements, roles, responsibilities, and expectations for affordable housing. Key topics include required documents, virtual support tools (e.g., mobile devices), property criteria (location, affordability), and managing expectations. This phase sets the foundation for understanding the walkthrough process.

- Discuss expectations, roles, costs (rent, deposits, fees), and schedule virtual walkthroughs.
- Introduce factors like location, unit type (house, apartment, furnished/unfurnished), amenities, and accessibility, e.g., elevators in high-rises.
- Educate clients on the U.S. rental housing search process, including identifying red flags to avoid scams or fraud.

Phase II: Guidance During the Walkthrough

With the client physically present at the property and the case manager connected virtually, this phase focuses, like in-person case management, on addressing safety, operational concerns, and client questions. Checklists guide evaluations, and talking points help case managers engage landlords. Clients also decide whether they're ready to proceed with a rental application.

- Help clients evaluate the property virtually, noting features, appliances, and safety considerations.
- Introduce the newcomer to U.S. home maintenance and operational basics to ensure safe and efficient living.

Phase III: Follow-Up Support

This phase involves decision-making and next steps. Key considerations include the property's suitability, lease terms, required documents, and planning the move-in if the unit is selected.

- Address client questions, talk through rental options, and assist in decision-making.
- Strengthen the relationship with landlord by answering questions and showcasing the benefits of working with resettlement agencies to rent to newcomers.

DURING

Phase I: Preparation and Planning

Preparing newcomers for a rental walkthrough using VCM is a crucial step in helping them navigate the housing search process. By managing expectations and ensuring clear communication, case managers can support clients in making informed decisions about the rental properties they are touring. This guide outlines key steps to take before the walkthrough to ensure a smooth and effective experience for both the client and case manager.

1. Prescreening and Documentation

- Discuss prescreening requirements: Case managers will explain basic criteria to apply for rental properties: income verification, rental history, credit and background checks.
- Required documents: Clients are briefed on the documents typically required for the rental application process, e.g., picture ID and references along with criteria cited above, and how to gather them before the walkthrough. Case managers must explain that newcomer clients may need to provide alternative documentation to meet these requirements. It is the case manager's responsibility to discuss these accommodations with the housing provider and advocate on behalf of their client. This resource provides guidance on alternative documents that may be accepted in place of standard requirements.
- Preparing virtual tools: Ensure clients have access to a mobile device, e.g., phone or tablet, to facilitate communication during the walkthrough. Make a test call to ensure the technology is working well.

2. Setting Expectations and Roles

- Clarifying roles and responsibilities: Case managers outline their role in providing virtual support while the newcomer client's role is doing the walkthrough in person to evaluate the property. The case manager should also review how they will support the client remotely throughout the walk-through.
- Discuss costs and fees: Discuss financial commitments such as rent, security deposits, application fees, and other costs associated with renting.
- Manage expectations: It is important to align the client's expectations with the realities of affordable housing. Case managers should explain what affordable housing in the U.S. looks like and highlight that while the perfect match may not be immediately available or in their budget, there are many suitable options to create a comfortable new home. This is particularly important for newcomers who may have been temporarily housed in higher-end accommodations like Airbnb or hotels with amenities.

3. Understanding Property Criteria

- Location and affordability: Discuss the importance of choosing a location that is affordable and accessible to work, school, transportation, and essential services.

- Unit type and features: Help clients understand different types of rental properties, e.g., houses, apartments, multi-unit buildings as well as features, e.g., is the unit furnished or not, number of bedrooms, and any other specific preferences or requirements.
- Accessibility considerations: If the client requires specific accessibility features, such as an elevator in a high-rise building or wheelchair access, this should be discussed upfront.

4. Introductions to the U.S. Housing Search Process

- Educating clients: Provide clients with a brief overview of how the housing search process works in the U.S., including the typical steps involved from searching for available properties to completing the application.
  - ► Resource:
    1. Step-by-Step Guide to Securing Housing
    2. Newcomer Rental FAQs: Your Guide to Finding and Securing a Home
- Identifying red flags: Train clients to recognize potential housing scams and fraud, which are more common in the rental market. Discuss common red flags such as landlords who ask for large upfront payments, rental listings with unusually low prices, or requests for personal information that are not typically required.

5. Orientation on U.S. Home Maintenance

For many newcomers, U.S. homes and appliances may be unfamiliar. The case manager provides an orientation on:

- How to use common home appliances (e.g., washer, dryer, oven).
- Basic home maintenance responsibilities (e.g., changing air filters, keeping the apartment clean, reporting issues to the landlord).
- Safety tips related to home appliances, such as preventing fires or gas leaks.
- Resources:
  1. Please Repair Guide (translated)
  2. Welcome to Your New Home (translated)

6. Preparing for the Virtual Walkthrough

- Scheduling and setting expectations: Once the client is prepared, schedule the walkthrough with the landlord or property manager.
- Explain the virtual walkthrough process: Provide a clear understanding of how the virtual walkthrough will unfold. This might include guidance on what to look for, how to ask questions, and how to document the features and safety aspects of the rental property.

AFTER

Phase I: Roles & Responsibilities

Activity	Who is Responsible		
	Case Manager	Newcomer Client	Landlord
Discuss prescreening requirements & documents	X	X	X
Clarify roles and responsibilities of each party	X		
Schedule and conduct a test call (Zoom, Facetime, etc.) with the client's virtual setup	X	X	
Explain legally acceptable alternative documentation for newcomers	X		X
Provide a detailed overview of the walkthrough process and instructions	X	X	
Review housing criteria, expectations, and walkthrough goals	X	X	
Discuss affordability and rent-related costs	X	X	
Set appointment(s) with adequate time in between if more than one walkthrough is scheduled	X		
Verify transportation to the property		X	

Questions to Review While Preparing the Client for the Walkthrough

These are example questions for before a virtual walkthrough. Other questions may be added, and not all these are necessarily relevant.

Does the newcomer client have an operable mobile device to conduct a virtual walkthrough?
Will there need to be an interpreter present at the time of the virtual walkthrough, and/or throughout the entire rental process?
Does the rental unit appropriately accommodate the newcomer's family size?
What documentation is required and acceptable to rent the unit?
Will the newcomer client be accompanied by anyone other than themselves at the time of the virtual walkthrough?
Is rental unit affordable based on the newcomer client's financial wellbeing?
Who is responsible for contacting the property owner/landlord to make an appointment to view the rental unit?
Who is responsible for following up with items needing to be addressed during housing discussions prior to the virtual walkthrough?
How far away from their place of employment is the property, is it feasible?
If they are disabled, is there an elevator/shift chair working in the building?
If they are disabled, are there any accommodations for the hearing impaired?
Has there been or is there any lead paint present/used inside the unit?
Are there routine pest exterminations conducted in the building and inside the rental unit?
When was the latest inspection of the building/unit, and what were the findings (i.e., code violations, fixings, updates to the unit)?
What is and is not included in the rental unit (i.e., utilities, furniture, appliances, parking, etc.)?
Is there parking available, if so, how is it allotted?

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Is there separate guest parking available?
What is included in the utilities (i.e., water, trash, gas, electric, cable)?
Do you have to choose the landlords preferred service provider(s) (i.e., internet, cable, electric)?
Will there be a rent increase when renewing the lease, is it stipulated somewhere?
How far is the nearest public transportation (walking distance)?
Are there schools (elementary, middle, high) nearby?
Are there quiet hours in the building/unit, if so, what are they?
What is the noise level like at night?
What are the rules on long-term visitors/extended stayers?
What does the application process entail?
Is rental insurance required to rent the unit, and who is responsible for paying it?

Phase II: Guidance During the Walkthrough

During a VCM walkthrough, the case manager supports the newcomer client while not physically present at the rental property. This phase focuses on addressing any safety concerns, operational issues, and ensuring that the client fully understands the property and its features. The case manager provides real-time guidance and information, helping the client assess the unit and determine if it is a suitable option. Both the case manager and newcomer client will have the Safeguard Checklist (below) in hand to consult while in the unit.

The newcomer client may have limited or no English language proficiency, nor confidence to engage directly with the landlord during the walkthrough. So, as with an in-person walkthrough, the case manager must be prepared. When needed, the client's mobile device can be turned to the case manager so the landlord or rental manager can see the person who is there to support and guide.

1. Evaluating the Property

As the client moves through the unit, the case manager helps assess key features of the property, including these:

- Condition of appliances, e.g., refrigerator, stove, HVAC system
- Layout and size of rooms, bedrooms, and common areas
- Safety features such as locks, window security, fire exits and extinguishers, plus smoke and carbon monoxide detectors
- Any visible signs of damage, mold, or maintenance needs and of pests, e.g., bugs or mice
- Resource:
    - i. Safeguard Checklist (below)
    - ii. Sample Housing Walkthrough Checklist

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2. Addressing Client Questions

The case manager is available to answer questions the client may have about the property, ensuring that the client feels comfortable and informed. This may include inquiries about the landlord's policies, neighborhood safety, nearby amenities, or potential maintenance issues.

3. Checking for Safety and Operational Functions

- The case manager ensures that the client understands the safety aspects of the property, pointing out potential hazards, e.g., broken steps, faulty electrical outlets, lack of proper lighting in hallways.
    - ▸ If safety concerns arise, the case manager can assist the newcomer client in asking about when repairs or changes will be made. Note: If no response is given, this may indicate that the property is not safe or suitable for renting.
- The case manager also makes sure to talk through operational functions, such as how the heating and cooling systems work, proper garbage disposal use (as relevant), and the location of important utility controls and meters, e.g., water, gas, electrical.

4. Engaging the Landlord: With the landlord or property manager, the case manager should facilitate communication and ensure all concerns are addressed. Some talking points:

- Confirming lease terms, including rent, security deposit, and any other fees.
- Asking about maintenance requests/repairs policies and property management practices.
- Clarifying any special conditions or rules specific to the property or neighborhood.

5. Other Questions to Consider

Rental properties/units differ on some specifications and details, so be ready to consider these things while the newcomer client is in a walkthrough. As with in-person walkthroughs, if the information is not already shared verbally or in writing, here are some questions to ask:

- If there is furniture in the unit, is it included in the rent or is there an additional cost for it?
- Will the unit be painted or remodeled before the move in date?
- Is the tenant allowed to do any of these things: paint, add ceiling fans, install carpet?
- Who is responsible for providing appliances?
    i. NOTE: In some states landlords are not required by law to provide some basic appliances such as a refrigerator, stove/oven, or air conditioner.
    ii. Know Your Rights: State-by-State Housing Guide
- What are possible lease terms: month-to-month, 6-month, one-year, multi-year?

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- Are smoke and carbon monoxide detectors, and fire extinguishers, in place and working?
- What utilities are included in the rent?
- Is parking available, and is it included in the rent or an additional cost?
- Are locks changed or rekeyed between tenants?
- Are there additional move-in fees, such as cleaning deposits or administrative fees?

6. Decision on Rental Application

At the end of the walkthrough, the client is encouraged to consider whether they feel ready to continue with a rental application. The case manager can guide the client through this decision-making process, asking them to evaluate whether the property meets their needs for safety, affordability, and livability.

Phase III: Roles and Responsibilities

Activity	Who is Responsible		
	Case Manager	Newcomer Client	Landlord
Provide access to the property			X
Guide the virtual walkthrough using the Safeguard Checklist	X	X	
Provide communication and translation support	X		
Ask any outstanding questions on unit condition, safety, features, accessibility needs, appliances, utilities, or anything else that was not covered during the tour	X		
Review lease term with landlord	X		X
Discuss application process, timeline, and financial obligations	X	X	X
Request a rental application	X		

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Safeguard Checklist

A **checklist** for the newcomer to have in hand during the walkthrough helps ensure the building and rental unit follows housing safety laws and is suitable for the client to live in.

ENTRAY WAY INTO THE RENTAL PROPERTY

- ☐ Are there individuals hanging out in the front of the property (ask the landlord if they are residents and if not, the frequency of nonresident individuals hanging out)?
- ☐ Is there separate access (key fob, key, code) to the building and rental unit?
- ☐ Are railings/banisters secure on all stairs?
- ☐ Is the entry into the building and hallways well-lit?
- ☐ Do hallways/communal areas have fire safety features (alarms, sprinklers, etc.)
- ☐ Are entryway and rooms free of insects, rodents or signs of infestation, e.g., rodent droppings?
- ☐ Do all locks on all doors secure and work properly?
- ☐ Is the unit and building free from visible, bare electrical wires or other loosely hanging wires?
- ☐ Are all entry points of access to the building and unit accessible?
- ☐ Are there any hidden compartments in the unit, e.g., crawlspace or pantry, or attic in a house?
- ☐ If there are area/room rugs, can they be lifted to see what is under them, i.e., flooring quality?
- ☐ Are all doors and windows, including the frames, secure?
- ☐ In a multi-unit building, is there a mailroom and how is it accessed?

CONDITIONS INSIDE THE RENTAL UNIT

- ☐ Are rooms clean and sanitary, i.e., free of mold and odors?
- ☐ Where is the electrical circuit breaker, and are all switches in working order?
- ☐ Do windows raise/open and close fully and easily?
- ☐ Are windows well insulated with secure locking features. NOTE: Some states require childproof locks on windows that are on the second or higher floors. Check your state’s regulations to make sure all the windows follow your state’s rules.
- ☐ Are there jacks for cable, internet, and a landline phone?
- ☐ Do all electrical outlets in all rooms work? NOTE: The client can bring a phone charger to check this.
- ☐ Are under-sink areas free of mildew, mold, and leaks ... and signs of leaks, like water damage?

- ☐ Are there any water spots/stains on the walls, ceilings, or other places in the unit? If so, does the landlord plan to address this issue? If not, this is another red flag against suitability.
- ☐ Are toilets securely bolted to the floor, and do they flush properly?
- ☐ Do all sinks and showers work? Do they drain quickly? Do they have good water pressure? NOTE: Run hot and cold water separately.
- ☐ Where are the fire extinguisher(s)? NOTE: Check dates for last or upcoming replacement.
- ☐ Do walls/ceilings have any peeling, flaking, or deteriorating paint? If so, does the landlord plan to address this issue? If not, this is another red flag against suitability.

FUNCTIONALITY WITHIN THE RENTAL UNIT

- ☐ Do all lights, light switches, and ceiling fans (if present) work and are they in good condition?
- ☐ Do all smoke alarms and carbon monoxide detectors work?
- ☐ Does the air conditioning, if any, and heating unit(s) work properly?
- ☐ Are all stove burners, broilers, and oven in working order?
- ☐ Does the refrigerator work and are the refrigerator and/or freezer doors seals strong?
- ☐ Is the dishwasher (if present) free from odors and mildew?
- ☐ If a microwave is present, does it work?
- ☐ Does the washing machine and dryer, if present in the unit or in a common space, work? Is the washer odor-free?
- ☐ Does the garbage disposal, if present, work?
- ☐ How does garbage/trash removal work? Locate/view dumpster and be clear how it is used.

Phase IV: Follow-Up Support

Following the walkthrough, which the newcomer client has done in person, with the case manager participating virtually, both are involved in decision-making and final steps phase. This can happen virtually as well right after the walkthrough or during an in-person meeting at a later time. When making a decision to secure a rental unit, the best practice is to ensure that the rental unit is a good fit, all options considered, for the newcomer household. Here are some key factors to consider:

1. Decision-Making Support

- Facilitate a discussion with the client about the property's suitability based on safety, affordability, location, and the client's unique needs.
- Use findings from the walkthrough to compare the property to other options, if applicable, and identify potential red flags or advantages.
- Help clients weigh their options, particularly if the property has minor concerns that could be addressed with the landlord.

2. Reviewing Lease Terms

- Provide a thorough review of the lease agreement with the client, ensuring they understand key elements such as:
    - i. Rent amount and payment deadlines.
    - ii. Security deposit requirements.
    - iii. Rules on maintenance responsibilities and repairs.
    - iv. Policies on subletting, lease termination, and landlord access.
    - v. Clarify any confusing language in the lease and ensure the client knows their rights as a tenant.
- Resource: Understanding Your Lease Agreement

3. Document Preparation

- As noted earlier, discussing the use of alternative documentation with the landlord is essential when a newcomer is renting for the first time as they will not have the typical requirements, such as rental histories or credit scores.
- Help the client in gathering all required documentation for the rental application.
- If documents are missing, outline how and where to find them.
- Resource: Rental Application Essentials: How Newcomers Can Use Alternative Documents

4. Landlord Engagement

- Strengthen relationships with the landlord or property manager by addressing their questions or concerns about renting to newcomer clients.
- Highlight the benefits of partnering with resettlement agencies, such as:
    i. Case manager support throughout the tenancy.
    ii. Assistance with onboarding the tenant, including orientations and ongoing communication.
    iii. Access to community resources that help maintain stable tenancies.
- Resources:
    i. Housing Provider Frequently Asked Questions: Renting to Newcomers and Refugees
    ii. Landlord Conversation Guide: Welcoming Refugees
    iii. How to Vet Housing Providers and Properties Toolkit
    iv. Fact Sheet & FAQ on Renting to Refugees and Other Eligible Newcomers

5. Planning the Move-In Process

- If the property is selected, help the client coordinate a smooth transition by:
- Setting a move-in date
    i. Arrange utility setup and connection as relevant, e.g., water, electricity, gas, internet.
    ii. Provide guidance on securing renters' insurance, if required.
    iii. Create a checklist of items needed for the new home: furniture, kitchenware, and cleaning supplies, etc.
- Resource: Home Set-Up Guide

6. Follow-Up Communication

- Schedule a follow-up check-in after the client moves into the property to address any early concerns or questions.
- Encourage the client to report maintenance issues promptly and offer to mediate with the landlord if necessary.

7. Next Steps if the Rental Unit is Not Suitable or the Client is Not Approved

- Discuss Client Feedback & Review Criteria:

i. Talk with the client to understand what specifically did not meet expectations, e.g., location, size, amenities. Review needs and preferences to adjust criteria as needed.

ii. Decide how many more properties can be offered to the client based on time, resources, and availability.

- Consider Additional Options & Schedule Walkthroughs: Find and suggest other properties that meet the client's criteria; schedule more virtual or in-person walkthroughs as needed.
- Address Approval Issues: If the client is not approved, review the reasons with the landlord or other housing provider. Include the client, and discuss ways to improve the application, e.g., providing alternative documents or addressing financial concerns.

Questions to Guide the Follow-Up Support

If moving forward with the rental

- Are any questions from the walkthrough / follow-up conversation unaddressed?
- Have all the required documents for the application been gathered and submitted?
- Is the application fee affordable for the client, and has it been paid?
- Are any additional fees, such as a security deposit or first/last month's rent, required, and are funds available to pay these?
- Is the landlord willing to provide a written receipt for all payments made?
- Has the client reviewed the rules and policies of the property, e.g., parking, guests, pets?
- Are utilities included in the rent, or will the client need to arrange for their setup?
- Has the landlord clarified the timeline for processing the application and signing the lease?

Lease review and move-in preparation

**Lease Agreement Reminder: The case manager is responsible for ensuring that the newcomer client fully understands all lease terms and conditions.*

- Does the lease need to be translated into another language and/or is an interpreter needed to assist the client in reviewing and signing the lease?
- Has the case manager reviewed all of the lease terms and conditions with the client?
- Has the client confirmed their understanding of all terms in the lease, such as renewal options, penalties, and tenant responsibilities?
- Are there additional documents the client needs to sign, such as disclosures or move-in checklists?
- Is the property ready for move-in, or are there pending repairs or renovations? If there are repairs, when will the move-in date be set?
- Does the client understand how to report maintenance issues and who to contact?
- Are any accessibility modifications or accommodations required before moving in?

If the rental property is not suitable for the newcomer client

- What factors are preventing the client from moving forward, e.g., cost, condition, location?
- Have alternative options or next steps been discussed?
- Has the client expressed preferences that were unmet, and are they negotiable?

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- Are there similar units available in the same area or nearby?
- Has the landlord provided helpful feedback on the application or walkthrough that could guide future efforts?
- What additional resources or strategies can be used to identify a more suitable property?