

Tenant Pre-Screen Checklist

A one-page list of neutral questions to ask before you schedule a showing — so you spend your time on real, qualified applicants.

Ask before you schedule a showing

- ☐ Desired move-in date, and does it fit when the unit is available.
- ☐ Number of people who would live in the unit.
- ☐ Any pets or assistance animals, so you can share your written policy.
- ☐ Does the stated income meet your posted income guideline for the rent.
- ☐ Have they seen the rent, deposit, lease length, and listing details.
- ☐ Are they able to complete your standard application and screening.
- ☐ Do they have any questions about the posted requirements.

Keep it fair and on paper

- ☐ Use the exact same written questions for every person who inquires.
- ☐ Judge answers against posted, objective criteria — not a gut feeling.
- ☐ Record date, channel, and answers with the rest of the rental records.
- ☐ Only run screening after written consent and per your standard process.
- ☐ Confirm the application matches what was said on the call.

The 2-minute phone script

"Thanks for reaching out about [address]. Rent is [amount], deposit [amount], on a [term] lease, available [date]. So I can point you the right way — what move-in date are you hoping for, and does that income and timing work for you?"

This checklist is for organizing your own screening process and is educational only. It is not legal advice. Fair Housing law prohibits treating applicants differently based on race, color, religion, national origin, sex, disability, or familial status, and many states and cities add more protected categories and source-of-income rules. Ask every applicant the same questions, apply the same written criteria, and check qualified local guidance before you screen or decline anyone.