

## Internal Transfer Checklist

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

Provider: \_\_\_\_\_

From Unit: \_\_\_\_\_ to \_\_\_\_\_

Transfer Date: \_\_\_\_\_

- Create Internal Transfer entry and populate utilities for new unit size.
- RGI Calculation Summary double checked & initialed
- RGI Calculation Summary to Finance (transfer fee)
- Household File unit number changed
- Change the Address in NewViews
- Internal Transfer and Date noted on front of Household File
- Internal Transfer notes printed for file
- Internal Transfer notes moved to NV2 Custom Analysis
- Remove from Internal Waitlist
- Tenant Pay / E-transfer
- Internal Transfer Letter
- Co-ops / Transfer Package:
  - Key Day Notice Cover Page
  - Occupancy Agreement (signed by the Board prior to Key Day)
  - Appendix A – Member Charges
  - Appendix B – Household Members
  - Appendix C – Housing Charge Subsidy Terms
  - Appendix D – Special Needs Unit Terms (if applicable)
  - Acknowledgement of Member Rights and Responsibilities
  - Multiple Sign Off Sheet
- Non-Profits / Transfer Package:
  - Key Day Notice Cover Page
  - Lease Agreement
  - LTB Form
- Key Day package signed
- Mold / Mildew
- Cost of Maintenance Charges
- Maintenance – Who is Responsible
- Fire Safety Acknowledgment Form (from the PM)
- Unit Inspection Form (from the PM)
- Approved by Supervisor (completed file)