

Fair-Housing-Safe Pre-Screening Worksheet

A neutral, repeatable starting point for early prospect conversations. It deliberately avoids collecting sensitive screening data and does not replace a lawful application, consent, or consumer-report process.

Use the same written process for every prospect

Pre-screening should identify objective rental-fit information without asking about protected traits. Publish your lawful criteria first, ask only what is necessary, offer reasonable-accommodation channels, and route every qualified prospect through the same next step.

Property / unit _____	Advertised rent _____
Available date _____	Application link / next step _____
Written criteria version/date _____	Staff member _____

Suggested neutral questions

■ What move-in date are you seeking?	Notes / date / initials
■ How many occupants would live in the home? Apply current lawful occupancy standards consistently.	Notes / date / initials
■ What lease term are you seeking?	Notes / date / initials
■ Do you have animals that would live in the home? Keep assistance-animal requests separate from pet screening.	Notes / date / initials
■ Can you meet the published income or other lawful financial criteria? Explain acceptable documentation and alternatives consistently.	Notes / date / initials
■ Can you meet the published move-in cost and payment schedule?	Notes / date / initials
■ Would you like to request a reasonable accommodation or an accessible application method?	Notes / date / initials
■ What is the best lawful way and time to contact you about the next step?	Notes / date / initials

Do not ask or record

■	Race, color, national origin, religion, sex, familial status, or disability details	Notes / date / initials
■	Questions about children, pregnancy, marital status, citizenship assumptions, or neighborhood preferences	Notes / date / initials
■	Medical diagnoses, medications, nature of a disability, or why an assistance animal is needed beyond permitted verification	Notes / date / initials
■	Different questions, standards, response times, or discouraging language for different prospects	Notes / date / initials
■	Protected information inferred from names, photos, accents, social media, or in-person impressions	Notes / date / initials

Prospect log

Educational worksheet only—not legal advice. Federal, state, and local fair-housing, source-of-income, screening, occupancy, privacy, and notice rules may add protections or requirements. Review current HUD guidance and obtain qualified local advice before adopting criteria.