#### **ANNEX 2: TEST REPORT FORMS**

- ADVANCE CALL FORM
- LOG OF APPOINTMENT CALLS
- TEST REPORT FORM RENTAL TESTS
- TEST REPORT FORM SALES TESTS
- RECORD OF RECOMMENDED HOMES
- LOG OF FOLLOW-UP CONTACT

## **ADVANCE CALL FORM**

(COMPLETE ONE FORM FOR EACH CALL ATTEMPTED)

Control # Person Making Call:						
Contact # / / /				М		
Disposition Code:	(see bac	k of this page,	)			
1. Unit Availability Information:						
Address	# of Bedrooms	Price	Date Available	Advertised Unit?		
1.				□ Yes □ No		
2.				□ Yes □ No		
3.				□ Yes □ No		
4.				□ Yes □ No		
5.				□ Yes □ No		
<ol> <li>What are the test site's office had so the property of the state of t</li></ol>	eak with an a pointment wit lo eemed ineligi	gent about the	e available housing necessary to discu □ Yes	iss the available  □ No		

## LOG OF APPOINTMENT CALLS

Control # Test	er ID #	
Test Site:		
Site Address, if known:		
Phone Number (s) (); (	)	
Contact #		
Date / / Time:	□ AM	□РМ
Disposition Code:		
Were you able to make an appointment?	□ Yes □ No	)
2. If <b>Yes</b> , when is the appointment?  Day  Date / /  Time: □ AM □ PM		
<ol> <li>Name of person you have appointment with:</li> <li>Name of person you spoke with during this contact:</li> <li>Location to meet:</li> <li>Comments made:</li> </ol>		
Contact #  Date / / Time :  Disposition Code:	<b>□ AM</b>	□РМ
Were you able to make an appointment?	□ Yes □ No	)
2. If <b>Yes</b> , when is the appointment?  Day  Date / /  Time : \ AM  PM		
<ol> <li>Name of person you have appointment with:</li> <li>Name of person you spoke with during this contact:</li> <li>Location to meet:</li> <li>Comments made:</li> </ol>		

# SITE VISIT REPORT FORM - RENTAL HOUSING DISCRIMINATION STUDY

1. CC	ONTROL	ROL #: 2. TESTER ID #:													
3. Te	ester Nam	ie:													
Na		Test Site: st Site (if applicable):  (number) (street)  (city) (state)									-				
5. Da	(city) (state) (zip)														
Da	Date (month/day/year):// Time beg				egan (arrival)::					AM PM AM PM					
		on persons with onses where ap				nd co	ntact	durir	ng you	ır vis	it				
	Name/F	Position	Race/Ethnicity (check one entry)  W=White I=American B= Black Indian H= Hispanic O= Other A= Asian DK=Don't Know					Group							
			w	В	н	Α	ı	0	DK	М	F	18- 30	31- 45	46- 65	65+
1. Nar Positio	me: on:														
<b>2.</b> Nar	me:														
3. Nar Positio															
<b>4.</b> Nar Positio	me: on:														
<b>5.</b> Nar Positio															
7. We	ere you a	ble to meet with	an a	igent	to d	iscus	ss hou	using	optio	ns?		Yes		No	
	<ul> <li>7. Were you able to meet with an agent to discuss housing options? ☐ Yes ☐ No</li> <li>8. Did the agent decline to meet with you today? ☐ Yes ☐ No</li> <li>8a. If yes, why?</li></ul>														
		umbers from Qu	estic			r the		oer o	f the	perso	on yo	u me	t with	to	

How many minutes did you wait to meet with someone (i.e. between the time you were greeted by someone when you entered and the time you met with the agent)?  minutes
11. When you asked about the availability of the advertised housing, what were you told?  ☐ Housing is available when I need it ☐ Housing is not available when I need it ☐ The status of the housing was not known ☐ Something else (specify):
<ul> <li>12. Were you told about other housing with the same # of bedrooms, within your price range, and available for rent when you need it?</li> <li>☐ Yes</li> <li>☐ No</li> <li>☐ Agent did not know</li> </ul>
<ul> <li>13. Were you told about any other housing options that would meet your needs (at least the minimum # of bedrooms, within your price range, and be available when you need it)?</li> <li>☐ Yes</li> <li>☐ No</li> <li>☐ Agent did not know</li> </ul>
14. How many rental units did the agent indicate were available to you? (Add available units from Q11-13)  Rental Units
15. Did one agent refer you to another agent who provided service to you? ☐ Yes ☐ No 15a. If yes, were you referred to an agent within the same agency? ☐ Yes ☐ No 15b. If you were referred, using the numbers from Question 6, enter the number of the person
to whom you were referred: L [enter line #]  16. At any time during your visit, did an agent comment on or make reference to Fair Housing
Laws? □ Yes □ No

	(number)	(stree	ŧt)			(un	it #)
	(city)			(state)		(zi	p)
Did you inspect thi	s unit?	□ Yes □	□ No				
s this the advertis	ed unit?	□ Yes □	□ No				
<b>Rent</b> : \$ /mc	onth			Date	Available:	//	
# of Bedrooms:						:	
low many floors in	n building?			Unit i	s on what t	floor?	_
low much of a sec	curity depos	sit is require	ed?	Lengt	h of lease a	available?	
□ One month's re	nt			□M	onth-to-mor	nth	
☐ Two month's re	nt			□ Th	ree month		
☐ Three month's	rent			□ Si	x month		
☐ Other (specify):				□ O <sub>1</sub>	ne year		
☐ Agent did not k	now			□ O:	ther (specify	y):	
☐ Security deposi	t not require	d					
Which utilities or a	menities ar	e included	in rent?	? [check c	ne per line	e]	
				Not	Agent did	Not	
		Inclu		Included	not say	Applicable	_
a. Electric							
<ul><li>b. Gas</li><li>c. Water/sewage</li></ul>							
d. Heat							
e. Cooling							
f. Parking							
g. Cable TV							
h. Laundry							
I. Pool/Health Cl							
	excellent re	pair, move-i r maintenan	n condit	tion ded, adequ	ıate	ms	
How do you rate th  ☐ Clean and in ☐ Some cleanin ☐ Very dirty and	excellent re	pair, move-i r maintenan substantial	n condit ce need mainten	tion ded, adequ nance, seri	ıate ous probler		
How do you rate th □ Clean and in □ Some cleani	excellent reng and minor d in need of	pair, move-ir maintenan substantial	n condit ce need mainten	tion ded, adequ ance, seri uilding's E	ıate ous probler		

Unit #	nit # 1 cont.								
	e agent make any of hborhood?	the	following comments about the	e su	ırro	ounding			
a.	Noise	b.	Safety	C.	S	chools			
	□ Quiet		□ Safe/low crime			Good			
	□ Noisy		□ Dangerous/high crime			Poor			
	□ No comment		□ No comment			No comment			
d.	Maintenance/ Service	es							
	□ Good Services/A	mer	nities						
	□ Poor Services/An	nen	ities						
	□ No comment								
	Race or Ethnicity? □ es, please describe: _		es □ No						

Unit #2 Address:							
	(number)	(5	street)			(unit	#)
	(city)			(state)		(zip)	)
Did you increat t	hio unit?	□ Voo	□ No				
Did you inspect t			□ No				
Rent: \$/r		□ 162		Dato	Available:	1 1	
# of Bedrooms:					Available: Sathrooms:		
# of Bedrooms: # of Bathrooms: How many floors in building? Unit is on what floor?							
Tiow many noors	iii ballallig	•		Officia	on what ho	OI :	_
How much of a se	ecurity dep	osit is req	uired?	Length	of lease ava	ailable?	
□ One month's	rent			□Мо	onth-to-month		
□ Two month's	rent			□ Th	ree month		
☐ Three month's	s rent			☐ Six	month		
□ Other (specify					ie year		
□ Agent did not				□ Ot	her <i>(specify)</i> : <sub>-</sub>		
☐ Security depo	sit not requ	ired					
Which utilities or	amenities a	are include	ed in rent	? [check or	ne per line]		
				Not	Agent did	Not	
a. Electric		I	ncluded	Included	not say	Applicable	
b. Gas							
c. Water/sewag	e						
d. Heat							
e. Cooling f. Parking							
g. Cable TV							
h. Laundry			_		=		_
	Club						
h. Laundry I. Pool/Health (		al conditio					
h. Laundry I. Pool/Health (	the physica		n of the u	□ □ unit's INTEF			
h. Laundry I. Pool/Health (  How do you rate to Clean and its	the physica	repair, mo	n of the uve-in cond	□ □ Init's INTEF	RIOR?		
h. Laundry I. Pool/Health (  How do you rate to Clean and it  Some clear	the physica in excellent ning and mi	repair, mo	n of the uve-in cond	unit's INTEF	RIOR?		
h. Laundry I. Pool/Health (  How do you rate to Clean and it  Some clear	the physica in excellent ning and mi	repair, mo	n of the uve-in cond	unit's INTEF	RIOR?		
h. Laundry I. Pool/Health (  How do you rate to Clean and it  Some clear	the physica in excellent ning and mi and in need	repair, mor nor mainte of substan	n of the uve-in condition	unit's INTER	RIOR?  ate ous problems		
h. Laundry I. Pool/Health (  How do you rate to  Clean and it Some clean Very dirty a	the physica in excellent ning and mi and in need	repair, monor mainten of substant	n of the uve-in condition	unit's INTER	RIOR?  ate ous problems		
h. Laundry I. Pool/Health (  How do you rate to Clean and it  Some clear  Very dirty at  How do you rate to Clean and it	the physicatin excellent ming and mind in need the physicatin excellent	repair, mor nor mainte of substant al condition repair, mor	n of the uve-in conditional maintenance necessitial ma	unit's INTER	RIOR?  ate bus problems  XTERIOR?		
h. Laundry I. Pool/Health (  How do you rate to Clean and it is come clear in Clean and it is come clear in Clean and it is come clear in Some clear in Some clear in Some clear in Clean and it is come clear in Clean	the physicatin excellent ning and mind in need the physicatin excellent ning and ming and min	repair, more nor mainte of substant al condition repair, more nor mainte	n of the uve-in condition maintenance needs	init's INTER lition eded, adequenance, serie building's E	RIOR?  ate bus problems  XTERIOR?		

Jnit # 2 cont.									
Did the agent make any of the following comments about the surrounding neighborhood?									
a. No	Quiet Noisy	<ul><li>b. Safety</li><li>□ Safe/low crime</li><li>□ Dangerous/high crime</li><li>□ No comment</li></ul>	c. Schools  □ Good □ Poor □ No comment						
d. Ma	aintenance/ Service	PS							
	Poor Services/An								
	nce or Ethnicity? □, please describe: _	Yes □ No							

Unit #3 Address:						
	(number)	(5	street)			(unit #)
	(city)			(state)		(zip)
	(5.5)			(====)		()
Did you inspect thi	is unit?	□ Yes	□ No			
Is this the advertis	ed unit?	□ Yes	□ No			
<b>Rent</b> : \$ /mo	onth			Date	Available:	<u>//</u>
# of Bedrooms:				# of E	Bathrooms:	
How many floors in	n building	?		Unit is	on what flooi	?
How much of a sec	curity depo	osit is req	uired?	Length	n of lease avail	able?
☐ One month's re	ent			□Мо	onth-to-month	
☐ Two month's re	ent			□ Th	ree month	
☐ Three month's	rent			□ Six	month	
☐ Other (specify):	:			□ On	e year	
□ Agent did not k	now			□ Ot	her (specify):	
☐ Security depos	it not requi	red				
Which utilities or an	nenities ar			Not	Agent did	Not
a. Electric		11	ncluded	Included	not say □	Applicable □
b. Gas						
c. Water/sewage d. Heat						
e. Cooling						
f. Parking g. Cable TV						
h. Laundry						
I. Pool/Health Cl	lub					
How do you rate the physical condition of the unit's INTERIOR?  ☐ Clean and in excellent repair, move-in condition ☐ Some cleaning and minor maintenance needed, adequate ☐ Very dirty and in need of substantial maintenance, serious problems						
How do you rote th	o nhucica	l oonditie	n of the L	uildina's F	VTEDIODO	
How do you rate th □ Clean and in				•	A I ERIUR!	
□ Some cleani		•			ate	
	•			•	ous problems	
. 5. 7 an cy an						

Unit # 3 cont.	Jnit # 3 cont.								
Did the agent make any of neighborhood?	the following comments about	the surrounding							
a. Noise	b. Safety	c. Schools							
□ Quiet	□ Safe/low crime	□ Good							
□ Noisy	□ Dangerous/high crime	□ Poor							
□ No comment	□ No comment	□ No comment							
d. Maintenance/ Service	es								
□ Good Services/A	menities								
□ Poor Services/Ar	menities								
□ No comment									
e. Race or Ethnicity? □	l Yes □ No								
If <b>Yes</b> please describe:									

Unit #4 Address:					
	(number)	(street)			(unit #)
	(city)		(state)		(zip)
Did you inspect thi	is unit?  □  `	Yes □ No			
Is this the advertis					
<b>Rent</b> : \$/mo	onth		Date .	Available:/	/
# of Bedrooms:				Bathrooms:	
How many floors in	n building?		Unit is	on what floor?	?
How much of a sec	curity deposit is	s required?	Length	n of lease availa	ble?
□ One month's re	ent		□Мо	onth-to-month	
□ Two month's re	ent		□ Th	ree month	
☐ Three month's	rent		□ Six	month	
□ Other (specify):	! <u></u>		□ On	ie year	
□ Agent did not k	now		□ Ot	her (specify):	
☐ Security deposi	t not required				
Which utilities or a	menities are in		Not	Agent did	Not
a. Electric		Included □	Included	not say A □	pplicable
b. Gas					
<ul><li>c. Water/sewage</li><li>d. Heat</li></ul>					
e. Cooling					
f. Parking g. Cable TV					
h. Laundry					
I. Pool/Health Cl	ub				
How do you rate th	e physical con	dition of the u	nit's INTER	RIOR?	
□ Clean and in	excellent repair	, move-in cond	ition		
□ Some cleanii	ng and minor ma	aintenance nee	ded, adequ	ate	
□ Very dirty an	d in need of sub	stantial mainte	nance, serio	ous problems	
How do you rate th	e physical con	dition of the b	uilding's E	XTERIOR?	
_	excellent repair		•		
□ Some cleanii	ng and minor ma	aintenance nee	eded, adequ	ate	
□ Very dirty an	d in need of sub	stantial mainte	nance, serio	ous problems	

Unit # 4 o	cont.				
	gent make any of orhood?	the	following comments about the	su	rrounding
a. N	oise	b.	Safety	c.	Schools
	Quiet		□ Safe/low crime		□ Good
	Noisy		□ Dangerous/high crime		□ Poor
	No comment		□ No comment		□ No comment
d. Ma	aintenance/ Service	s			
	Good Services/An Poor Services/An No comment				
e. Ra	ce or Ethnicity? □	Ye	s □ No		
If Yes	, please describe: _				

Unit #5 Address:						
	(number)	(:	street)			(unit #)
	(city)			(state)		(zip)
Did you inspect thi	io unit?	□ Voo		lo.		
Did you inspect thi						
Is this the advertis		□ Yes				, ,
<b>Rent</b> : \$/mo					Available:	
# of Bedrooms:				# of E	Bathrooms: _	
How many floors in	n building	?		Unit is	s on what floo	or?
How much of a sec	curity depo	osit is req	uired?	Lengtl	n of lease ava	ilable?
☐ One month's re	ent			□ Mo	onth-to-month	
☐ Two month's re	ent			□ Th	ree month	
☐ Three month's	rent			□ Six	k month	
☐ Other (specify):	·			□ Or	ne year	
□ Agent did not k	now			□ Ot	her (specify):_	
☐ Security depos	it not requi	red				
Which utilities or a	imenities a	are includ	ed in r	ent? [cneck o Not	ne per linej Agent did	Not
- Flores		I	ncluded	Included	not say	Applicable
a. Electric b. Gas						
c. Water/sewage						
d. Heat						
e. Cooling f. Parking						
g. Cable TV						
h. Laundry						
I. Pool/Health Cl	lub					
How do you rate th  ☐ Clean and in ☐ Some cleani	excellent i	epair, mo	ve-in co			
□ Very dirty an	d in need o	of substan	tial mai	ntenance, seri	ous problems	
How do you rate th	ne nhvsica	l conditio	n of th	e huilding's F	XTERIOR?	
□ Clean and in				•		
		•		needed, adequ	ate	
	•			ntenance, seri		
— Voly dilty all	a in need (	, Jubstall	u. 11101	incilatios, sell	ous problems	

Unit # 5cont.		
Did the agent make any of neighborhood?	the following comments abo	out the surrounding
a. Noise	b. Safety	c. Schools
□ Quiet	□ Safe/low crime	□ Good
□ Noisy	□ Dangerous/high crime	□ Poor
□ No comment	□ No comment	□ No comment
d. Maintenance/ Service	es	
□ Good Services/A	menities	
□ Poor Services/A	menities	
□ No comment		
e. Race or Ethnicity? □	Yes □ No	
If <b>Yes</b> , please describe:		

18.	Did the agent tell you that there was	s a waiting li	st for the adv	ertised unit or	similar units	s?
182	Did the agent offer to place your na	ume on the w	vaiting liet?	П Уес П	No	
			•			
100.	How many people did the agent say	y are currem	ly on the war	ung iist (ii app	ilcable)?	
4.0	0	6.0				.,
19.	Check if the agent indicated that ar	ny of the folio	Ü	•		
			Not	Agent did	Agent Didn'	t
		Required —	Required —	not Indicate	Know	
	a. Application					
	o. Credit Check					
20. 8	Specify the name and amount of any	fee that the	agent indica	ated was requi	red:	
	Fees that must accom	pany applica	ation	Amount	of Fee	
	(e.g. Application Processing, Cred					
	1.			\$		
	2.			\$		
	3.			\$		
	4.			\$		
	TOTAL FEES			\$		
21.	Were you told of any rent specials o	r other incer	ntives that yo	u would receiv	e if you wer	e to
	rent a particular property?	□ Yes	□ No			
21a.	If yes, describe the incentive to ren	nters:				
					_	
22.	Were you invited to complete an ap	plication?	□ Ye	s 🗆 No		

23.	Complete the grid below regarding any of your quathe agent. (check only one per line)	lifications to rent tha	at were requested by
	Qualification:	Agent Requested	Agent Did Not Request
a.	Your marital status		
b.	Your family size		
C.	Your income		
d.	Your spouse's income		
e.	Your occupation		
f.	Your spouse's occupation		
g.	Your length of employment		
h.	Your spouse's length of employment		
I.	Your debts		
j.	Your credit standing		
k.	Personal references		
I.	Co-signer		
m.	other:		
24.	Did the agent make any of the following comments  ☐ You are qualified  ☐ You are NOT qualified  ☐ Qualifications not discussed	regarding your qua	lifications to rent?
	Did the agent suggest that you consider a different in the ad? ☐ Yes ☐ No . If yes, was the other property also managed by the ☐ Yes ☐ No ☐ Don't know	•	ouilding than the one
26.	Were any remarks made by the agent about race of surrounding recommended units)? ☐ Yes  If Yes, please describe:	□ No	
27.	Were any remarks made by the agent about religion with children? ☐ Yes ☐ No  If Yes, please describe:	·	

28.	What arrangements were made regarding future contact between you and the agent?  ☐ The agent said that he/she would contact you  ☐ The agent invited you to call him/her  ☐ Future arrangements were not made  ☐ Other (specify):
29.	Date/Time of Site Visit Report completion: □ AM
	Date (month/day/year):/ Time: □ PM
Sтат	TEMENT OF TESTER
ı	I prepared this test report form and attest by my signature below that it is, to the best of my recollection, a true and accurate account of the events that took place during a test in which I participated:
	Signature

# SITE VISIT REPORT FORM - SALES HOUSING DISCRIMINATION STUDY

1.	CONTROL #:	TROL #: 2. TESTER ID #:												
3.	Tester Name:													
4.	4. Location of Office:  Firm Name (if applicable):  Office/Room Number:  Address:  (number)  (city)  (state)  (zip)				- - -									
5.	Date and Time of Site Visit:													
				AM PM AM PM										
Information on persons with whom you had contact during your visit [check responses where appropriate]:														
	Name/Position  Race/Ethnicity (check one entry)  W=White I=American B= Black Indian H= Hispanic O= Other A= Asian DK=Don't Know													
		w	В	Н	Α	ı	0	DK	М	F	18- 30	31- 45	46- 65	65+
<b>1.</b> Po	Name:sition:													
	2. Name: Position:													
<b>3.</b> Po	Name:sition:													
4.	Name: sition:													
<b>5.</b> Po	Name:sition:													
	7. Were you able to meet with an agent to discuss housing options? ☐ Yes ☐ No 7a. If yes, where did you meet? ☐ Agent's office ☐ Somewhere else (specify):													

8. Did the agent decline to meet with you today? ☐ Yes ☐ No
8a. If yes, why?
(NOTE: if you are able to make an appointment for a later time, then stop here and fill out the Site Visit Report Form after your appointment)
9. Using the numbers from Question 6, enter the number of the person or persons you met with to discuss housing options:  [enter line # for person 1]  [enter line # for person 2 if applicable]
10. How many minutes did you wait to meet with someone (i.e. between the time you were greeted by someone at the firm when you entered and the time you met with the agent)? minutes
11. When you asked about the availability of the home in the Ad, what were you told?  ☐ Home is available ☐ Home is not available ☐ The status of the home was not known ☐ Something else (specify):
<ul><li>12. Were there any other homes recommended to you that had the same # of bedrooms as the advertised home?</li><li>☐ Yes</li><li>☐ No</li><li>☐ Agent did not know</li></ul>
<ul> <li>13. Were there any other homes recommended to you that had a <u>different</u> # of bedrooms than the advertised home, but would still meet your needs?</li> <li>☐ Yes</li> <li>☐ No</li> <li>☐ Agent did not know</li> </ul>
14. Not including the requested advertised home, how many available homes did the agent offer for your review? (This # includes homes inspected as well as any homes offered to you in a list or other format)  Homes
<ul><li>15. At any time during your visit, did an agent comment on or make reference to Fair Housing Laws?</li><li>□ Yes</li><li>□ No</li></ul>

16. Based on your observations and the used to select properties for your rev  ☐ Multiple listings book(s) ☐ Home seeker guides/magazines ☐ Computer ☐ Internet website - (specify): ☐ Other printed sheet ☐ File cards ☐ Scraps of paper ☐ Other (specify): ☐ None	<u> </u>	low the sou	urces		
17. Did one agent refer you to another 17a. If yes, were you referred to an ager	nt within the same agency?	□ Yes	□ No		
17b. If you were referred, using the num	bers from Question 6, enter the nu	umber of th	e person		
to whom you were referred:	[enter line #]				
<ul> <li>18. Was the agent's role described to you as being one of the following:</li> <li>□ Buyer's agent</li> <li>□ Seller's agent</li> <li>□ Dual agent</li> <li>□ Did not disclose</li> </ul>					
19. Were you <i>asked</i> to sign any agreem ☐ Yes ☐ No	nents or documents?				
19a. If yes, please specify each below:					
Document Name	Purpose	Did yo	u sign?		
1.		□ Yes	□ No		
2.		□ Yes	□ No		
3.		□ Yes	□ No		
4.		□ Yes	□ No		
20. Did the agent ask if you had already visited a lender or been pre-qualified for financing?  ☐ Yes ☐ No					
21. Did the agent tell you that you must go to a lender or be pre-qualified for financing before looking at homes?					
□ Yes □ No					

	. Complete the grid below regarding any of your qualifications to purchase a house that were requested by the agent at any point. <i>(check only one per line)</i>					
	Qualification:		Agent Requested	. t	Agent Did Not Request	
a.	Your marital status					
b.	Your family size					
C.	Your income					
d.	Your spouse's income					
e.	Your occupation					
f.	Your spouse's occupation					
g.	Your length of employment					
h.	Your spouse's length of employ	ment				
I.	Your savings/assets					
j.	Your debts					
k.	Credit standing					
I.	Amount available for downpaym	nent				
m.	Reason for moving					
n.	other:					
23.	<ul> <li>23. Did the agent make any of the following comments regarding your qualifications to buy a home?</li> <li>☐ You are qualified</li> <li>☐ You are NOT qualified</li> <li>☐ Qualifications not discussed</li> </ul>					
24.	24. Did the agent volunteer to help you find financing? ☐ Yes ☐ No					
25.	25. Did the agent suggest one or more mortgage companies, lenders, or brokers?  ☐ Yes ☐ No					
25a	. If yes, please list them below:					
	Mortgage Company/Firm	Lender/Broker Na	me C	ity	Telephone	
1.						
2.						
3.						
4.						

26. Did the agent discuss the type of financing that might be avai	lable to you?				
26a. If yes, please indicate which types of financing the agent discussed or mentioned by filling out the grid below: [check one per line]					
	Agent Discussed	Agent did not mention			
a. Conventional Fixed Rate Financing (non FHA)					
b. Conventional Adjustable Rate Financing (ARM)					
c. FHA or VA Financing					
d. Other government financing (state or local) (specify):					
e. Other (specify):					
27. During the visit, did anyone pre-qualify you or calculate for you the amount of financing that you could afford using your specific financial information (income, debts, and assets)?  ☐ Yes ☐ No					
27a. If yes, using the numbers from Question 6, enter the number of the person who provided					
you with the information on the amount of financing you con #] 27b. If yes, was this person?  ☐ The agent who was providing housing information to you ☐ An in-house mortgage specialist ☐ A lender by telephone ☐ Someone else	uld afford: L	☑ [enter line			
28. Home Price:  Did the agent suggest a house price or price range that you  Yes No  28a. If yes, what was the total home price?  \$ (lowest) \$	should conside				
29. Loan/Mortgage Amount:  Did the agent suggest a mortgage amount (\$ borrowed) or racconsider?  ☐ Yes ☐ No	nge that you sl	nould			
29a. If yes, what was the total loan amount? \$ (lowest) \$	(highe	est)			
30. Interest Rates:  Did the agent mention interest rates for mortgage loans?  ☐ Yes ☐ No					
30a. If yes, what were the interest rates mentioned?% (lowest)% (highest)					

31. Monthly Payments:  Did the agent mention monthly payments for a mortgage loan?  ☐ Yes ☐ No	
31a. If yes, what were the monthly payments? \$ (lowest) \$	_ (highest)
32. Downpayment:  Did the agent mention the likely downpayment on a house?  ☐ Yes ☐ No	
32a. If yes, what was the downpayment amount or percentage?  Downpayment Amount: \$ (lowest) \$  Downpayment Percent:% (lowest)	(highest) % (highest)
33. Did the agent discuss any of the following with you?  [check all that apply]  □ Paying down debts □ Debt consolidation □ Downpayment assistance (gift, special program) □ Co-signer □ Seller assistance □ Pre-qualification letter □ None of the above were discussed	
33a. For any items discussed, please describe what you were told:	

#### **NEIGHBORHOOD INFORMATION**

Did the agent discuss or make comments about neighborhoods or areas (other than those surrounding recommended/inspected homes)?  ☐ Yes - Complete Question 35 for up to 5 areas discussed  ☐ No - Skip to Question 36
INFORMATION ABOUT NEIGHBORHOODS/AREAS DISCUSSED
Neighborhood/Area #1 Name of Area:  This area is a:   County   Town or City   School District  Don't know
Did the agent make any of the following comments about this area?  a. Noise b. Safety c. Schools  □ quiet □ safe/low crime □ good □ noisy □ dangerous/high crime □ poor □ no comment □ no comment □ no comment
d. Investment  □ rising values/good investment □ flat values/not much appreciation □ declining values/depreciation □ no comment □ no comment □ c. Public Services □ good services/amenities □ poor/unreliable services □ no comment
f. Race or ethnicity?
Neighborhood/Area #2  Name of Area:  □ County □ Town or City □ School District □ Neighborhood □ Don't know
Did the agent make any of the following comments about this area?  a. Noise b. Safety c. Schools  quiet safe/low crime good  noisy dangerous/high crime poor  no comment no comment no comment
d. Investment  □ rising values/good investment □ flat values/not much appreciation □ declining values/depreciation □ no comment □ no comment □ c. Public Services □ good services/amenities □ poor/unreliable services □ no comment
f. Race or ethnicity? ☐ Yes ☐ No If yes, please describe:

id the agent make any of a. Noise □ quiet □ noisy □ no comment	<ul> <li>□ Neighborhoo</li> <li>the following combon</li> <li>b. Safety</li> <li>□ safe/low combon</li> <li>□ dangerous</li> </ul>	od □ Don't kr omments about this	
n. Noise □ quiet □ noisy □ no comment	b. Safety  ☐ safe/low o  ☐ dangerous		
	□ no comme	s/high crime	<ul><li>□ good</li><li>□ poor</li><li>□ no comment</li></ul>
<ul> <li>Investment</li> <li>rising values/good i</li> <li>flat values/not mucl</li> <li>declining values/dep</li> <li>no comment</li> </ul>	h appreciation	•	vices/amenities liable services
. Race or ethnicity? □ `f yes, please describe: _			
eighborhood/Area #4	Name of A	rea:	
	☐ County ☐ Neighborhoo	☐ Town or City od ☐ Don't kr	
id the agent make any of a. Noise □ quiet □ noisy □ no comment	the following co b. Safety □ safe/low c □ dangerous □ no comme	rime s/high crime	c. Schools  good poor no comment
d. Investment ☐ rising values/good i ☐ flat values/not mucl ☐ declining values/dep ☐ no comment	h appreciation	•	vices/amenities liable services
. Race or ethnicity? □ `f yes, please describe: _			

Neighborhood/Area <b>#5</b>	Name of Area:	
This area is a:	☐ County ☐ Town or Ci☐ Neighborhood ☐ Dor	ity
Did the agent make any of a. Noise  ☐ quiet ☐ noisy ☐ no comment	of the following comments about b. Safety □ safe/low crime □ dangerous/high crime □ no comment	t this area? c. Schools □ good □ poor □ no comment
d. Investment  ☐ rising values/good ☐ flat values/not mu ☐ declining values/de ☐ no comment	ch appreciation ☐ poor/u	ervices services/amenities unreliable services emment
f. Race or ethnicity?   If yes, please describe:		

36.	<ul> <li>Were any remarks made by the agent about race or ethnicity (other than those regarding specific neighborhoods)?</li> <li>□ Yes</li> <li>□ No</li> <li>If Yes, please describe:</li> </ul>						
37.	Were any remarks made by the agent about religion, persons with disabilities, or families with children? ☐ Yes ☐ No If Yes, please describe:						
38.	What arrangements were made regarding future contact between you and the agent?  ☐ The agent said that he/she would contact you  ☐ The agent invited you to call him/her  ☐ Future arrangements were not made  ☐ Other (specify):						
39.	Date/Time of Site Visit Report completion:  Date (month/day/year)://  AM  Time: □ PM						
	ASE REMEMBER TO COMPLETE A RECORD OF RECOMMENDED HOMES FOR EACH HOME DIMMENDED.						
<b>S</b> тат	EMENT OF TESTER						
re	prepared this test report form and attest by my signature below that it is, to the best of my ecollection, a true and accurate account of the events that took place during a test in which participated:						
	Signature						

### **RECORD OF RECOMMENDED HOMES**

	(Complete one form for each address recommended or inspected)								
1.	Full Address of Home								
(nı	umber) (street)			(unit)					
	(city or town)	(state)		(zip code)					
2.	Basic Information		First Site Visit	Second Site Visit					
a.	Is this the advertised home?		Yes No	Yes No					
b.	Did you inspect the home?		Yes No	Yes No					
C.	How many bedrooms were in the home?								
d.	What was the current asking price?								
IF	HOME WAS INSPECTED ON EITHER VISIT:								
3.	What type of building is it? Single-family detached Duplex Rowhouse or Townhouse Multi-family structure	bee	this a newly built ho en occupied? Yes No	ome that has never					
5.	How do you rate the physical condition of the home's INTERIOR?  Clean and in excellent repair, move-in condition  Some cleaning and minor maintenance needed, adequate  Very dirty and in need of substantial maintenance, serious problems								
6.	Clean and in excellent repair, move-in co Some cleaning and minor maintenance r	you rate the physical condition of the home's EXTERIOR? an and in excellent repair, move-in condition ne cleaning and minor maintenance needed, adequate by dirty and in need of substantial maintenance, serious problems							
7.	Did the agent make any of the following co	about the surround	ling neighborhood?						
	a. Noise b. Safety		c. Schoo						
	Quiet Safe/low crime Noisy Dangerous/hig								
	No comment No comm	•		comment					
	d. Investment Rising values/good investment Flat values/not much appreciation Declining values/depreciation No comment		Public Services od Services/Amenities or Services/Amenities comment						
	f. Race or ethnicity? Yes No If Yes, please describe:								