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
(COMPLET ONE FORM FOR EACH CALL ATTEMPTED)

Control # ____________________________ Person Making Call: ____________________________

Contact # ____________________________
Date ___/___/____ Time _____:______ □ AM □ PM

Disposition Code: _______________ (see back of this page)

1. Unit Availability Information:

<table>
<thead>
<tr>
<th>Address</th>
<th># of Bedrooms</th>
<th>Price</th>
<th>Date Available</th>
<th>Advertised Unit?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>5.</td>
<td></td>
<td></td>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

2. What are the test site’s office hours? ____________________________________________

3. Is it possible to stop in and speak with an agent about the available housing?
   □ Yes □ No

4. Were you informed that an appointment with an agent is necessary to discuss the available
   housing? □ Yes □ No

5. Was the advertised housing deemed ineligible? □ Yes □ No

6. Verify the Test Site Address: ____________________________________________________

7. With whom did you speak? ______________________________________________________

COMMENTS:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
LOG OF APPOINTMENT CALLS

Control # ______________________  Tester ID # ______________________

Test Site: ____________________________________________________________

Site Address, if known: ________________________________________________

Phone Number (s) (____) ______________________ ; (____) ______________________

Contact # ______________________

Date ___ ___/ ___ ___/ ___ ___  Time _____ : ________  □ AM  □ PM

Disposition Code: ______________________

1. Were you able to make an appointment?  □ Yes  □ No

2. If Yes, when is the appointment?
   Day ______________________
   Date ___ ___/ ___ ___/ ___ ___
   Time _____ : ________  □ AM  □ PM

3. Name of person you have appointment with: ____________________________

4. Name of person you spoke with during this contact: ______________________

5. Location to meet: ____________________________________________________

6. Comments made: ____________________________________________________

Contact # ______________________

Date ___ ___/ ___ ___/ ___ ___  Time _____ : ________  □ AM  □ PM

Disposition Code: ______________________

1. Were you able to make an appointment?  □ Yes  □ No

2. If Yes, when is the appointment?
   Day ______________________
   Date ___ ___/ ___ ___/ ___ ___
   Time _____ : ________  □ AM  □ PM

3. Name of person you have appointment with: ____________________________

4. Name of person you spoke with during this contact: ______________________

5. Location to meet: ____________________________________________________

6. Comments made: ____________________________________________________
1. CONTROL #:  
2. TESTER ID #:  

3. Tester Name:  

4. Location of Test Site:  
   Name of Test Site (if applicable): ________________________________  
   Address: _____________________________________________________________  
   (number) (street)  
   _______________________________________________________________  
   (city) (state) (zip)  

5. Date and Time of Site Visit:  
   Date (month/day/year): ___/___  Time began (arrival): ____:____  
   G AM  
   Appointment Time: ____:____  G PM  
   Time ended (departure): ____:____  G AM  
   G PM  

6. Information on persons with whom you had contact during your visit  
   [check responses where appropriate]:  
   
<table>
<thead>
<tr>
<th>Name/Position</th>
<th>Race/Ethnicity (check one entry)</th>
<th>Gender</th>
<th>Age Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>W=White I=American B=Black H=Hispanic A=Asian O=Other DK=Don't Know</td>
<td>M F 18-30 31-45 46-65 65+</td>
<td></td>
</tr>
<tr>
<td>1. Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Name:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Were you able to meet with an agent to discuss housing options?  
   □ Yes  □ No  

8. Did the agent decline to meet with you today?  
   □ Yes  □ No  

8a. If yes, why? ________________________________________________  

9. Using the numbers from Question 6, enter the number of the person you met with to  
   discuss housing options:  
   □ [enter line #]
<table>
<thead>
<tr>
<th>10.</th>
<th>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)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>_____ minutes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>11.</th>
<th>When you asked about the availability of the advertised housing, what were you told?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Housing is available when I need it</td>
</tr>
<tr>
<td></td>
<td>✅ Housing is not available when I need it</td>
</tr>
<tr>
<td></td>
<td>✅ The status of the housing was not known</td>
</tr>
<tr>
<td></td>
<td>✅ Something else (specify): ______________________________________________________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>12.</th>
<th>Were you told about other housing with the same # of bedrooms, within your price range, and available for rent when you need it?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Yes</td>
</tr>
<tr>
<td></td>
<td>✅ No</td>
</tr>
<tr>
<td></td>
<td>✅ Agent did not know</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>13.</th>
<th>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)?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Yes</td>
</tr>
<tr>
<td></td>
<td>✅ No</td>
</tr>
<tr>
<td></td>
<td>✅ Agent did not know</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>14.</th>
<th>How many rental units did the agent indicate were available to you? (Add available units from Q11-13)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Rental Units</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>15.</th>
<th>Did one agent refer you to another agent who provided service to you?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Yes  ❌ No</td>
</tr>
</tbody>
</table>

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: [enter line #]

<table>
<thead>
<tr>
<th>16.</th>
<th>At any time during your visit, did an agent comment on or make reference to Fair Housing Laws?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✅ Yes</td>
</tr>
<tr>
<td></td>
<td>✅ No</td>
</tr>
</tbody>
</table>
17. Please fill out the following information on any rental units that were recommended to you for up to five units, beginning with those you inspected:

<table>
<thead>
<tr>
<th>Unit #1 Address:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(number)</td>
<td>(street)</td>
</tr>
<tr>
<td>(city)</td>
<td>(state)</td>
</tr>
<tr>
<td>(unit #)</td>
<td>(zip)</td>
</tr>
</tbody>
</table>

Did you inspect this unit?  
☐ Yes  ☐ No

Is this the advertised unit?  
☐ Yes  ☐ No

Rent: $_______/month

Date Available: ___/___/___

# of Bedrooms: ________

# of Bathrooms: _________

How many floors in building? ________

Unit is on what floor? ________

How much of a security deposit is required?  
☐ One month’s rent  ☐ Two month’s rent  ☐ Three month

☐ Three month’s rent  ☐ Six month  ☐ One year

☐ Other (specify):__________  ☐ Agent did not know  ☐ Security deposit not required

Length of lease available?  
☐ Month-to-month  ☐ Three month

☐ Three month  ☐ Six month  ☐ One year

☐ Other (specify):__________

Which utilities or amenities are included in rent? [check one per line]

<table>
<thead>
<tr>
<th>a. Electric</th>
<th>Included</th>
<th>Not Included</th>
<th>Agent did not say</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>b. Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Water/sewage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Heat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Cooling</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Parking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Cable TV</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Laundry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i. Pool/Health Club</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 rate the physical condition of the building’s EXTERIOR?  
☐ 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
Did the agent make any of the following comments about the surrounding neighborhood?

<table>
<thead>
<tr>
<th>a. Noise</th>
<th>b. Safety</th>
<th>c. Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Quiet</td>
<td>□ Safe/low crime</td>
<td>□ Good</td>
</tr>
<tr>
<td>□ Noisy</td>
<td>□ Dangerous/high crime</td>
<td>□ Poor</td>
</tr>
<tr>
<td>□ No comment</td>
<td>□ No comment</td>
<td>□ No comment</td>
</tr>
</tbody>
</table>

d. Maintenance/ Services

- □ Good Services/Amenities
- □ Poor Services/Amenities
- □ No comment

e. Race or Ethnicity? □ Yes □ No

If Yes, please describe: 

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
Unit #2 Address: ____________________________________________

<table>
<thead>
<tr>
<th>(number)</th>
<th>(street)</th>
<th>(unit #)</th>
<th>(city)</th>
<th>(state)</th>
<th>(zip)</th>
</tr>
</thead>
</table>

**Did you inspect this unit?**  
☐ Yes  ☐ No

**Is this the advertised unit?**  
☐ Yes  ☐ No

Rent: $________/month  

**Date Available:** ___/___/___

**# of Bedrooms:** ________  

**# of Bathrooms:** _________

**How many floors in building?** ________  

**Unit is on what floor?** ________

**How much of a security deposit is required?**  
☐ One month’s rent  
☐ Two month’s rent  
☐ Three month’s rent  
☐ Other (specify):__________  
☐ Agent did not know  
☐ Security deposit not required

**Length of lease available?**  
☐ Month-to-month  
☐ Three month  
☐ Six month  
☐ One year  
☐ Other (specify):__________

**Which utilities or amenities are included in rent?** [check one per line]

<table>
<thead>
<tr>
<th>Included</th>
<th>Not Included</th>
<th>Agent did not say</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Electric</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>b. Gas</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>c. Water/sewage</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>d. Heat</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>e. Cooling</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>f. Parking</td>
<td>☐</td>
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<td>☐</td>
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<td>g. Cable TV</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>h. Laundry</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>i. Pool/Health Club</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

**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 rate the physical condition of the building’s EXTERIOR?**  
☐ Clean and in excellent repair, move-in condition  
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Did the agent make any of the following comments about the surrounding neighborhood?

<table>
<thead>
<tr>
<th>a. Noise</th>
<th>b. Safety</th>
<th>c. Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Quiet</td>
<td>□ Safe/low crime</td>
<td>□ Good</td>
</tr>
<tr>
<td>□ Noisy</td>
<td>□ Dangerous/high crime</td>
<td>□ Poor</td>
</tr>
<tr>
<td>□ No comment</td>
<td>□ No comment</td>
<td>□ No comment</td>
</tr>
</tbody>
</table>

d. **Maintenance/ Services**

- □ Good Services/Amenities
- □ Poor Services/Amenities
- □ No comment

e. **Race or Ethnicity?** □ Yes □ No

If Yes, please describe:  

-----------------------------------------------

-----------------------------------------------

-----------------------------------------------
Unit #3 Address: ____________________________________________  

(number) (street) (unit #) 

(city) (state) (zip) 

Did you inspect this unit? □ Yes  □ No 
Is this the advertised unit? □ Yes  □ No 

Rent: $_______/month  
Date Available: ____/____/____  

# of Bedrooms: _______  
# of Bathrooms: _______  

How many floors in building? _______  
Unit is on what floor? _______  

How much of a security deposit is required?  
□ One month’s rent  
□ Two month’s rent  
□ Three month’s rent  
□ Other (specify):_________________  
□ Agent did not know  
□ Security deposit not required  

Length of lease available?  
□ Month-to-month  
□ Three month  
□ Six month  
□ One year  
□ Other (specify):_________________  

Which utilities or amenities are included in rent? [check one per line]  

<table>
<thead>
<tr>
<th>a. Electric</th>
<th>Included</th>
<th>Not Included</th>
<th>Agent did not say</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>b. Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Water/sewage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Heat</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Cooling</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Parking</td>
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<td>i. Pool/Health Club</td>
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<td></td>
</tr>
</tbody>
</table>

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 rate the physical condition of the building’s EXTERIOR?  
□ 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
Did the agent make any of the following comments about the surrounding neighborhood?

<table>
<thead>
<tr>
<th></th>
<th>Noise</th>
<th>Safety</th>
<th>Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Quiet</td>
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<tr>
<td></td>
<td>Noisy</td>
<td>Dangerous/high crime</td>
<td>Poor</td>
</tr>
<tr>
<td></td>
<td>No comment</td>
<td>No comment</td>
<td>No comment</td>
</tr>
</tbody>
</table>

d. Maintenance/ Services

- Good Services/Amenities
- Poor Services/Amenities
- No comment

e. Race or Ethnicity?  □ Yes  □ No

If Yes, please describe: __________________________________________________________

_____________________________________________________________________________

_____________________________________________________________________________
Unit #4 Address: ____________________________________________
(number) (street) (unit #)
_________________________________________________________________
(city) (state) (zip)

Did you inspect this unit? □ Yes □ No

Is this the advertised unit? □ Yes □ No

Rent: $________/month

Date Available: ___/___/___

# of Bedrooms: _______

# of Bathrooms: _______

How many floors in building? _______

Unit is on what floor? _______

How much of a security deposit is required?

- □ One month’s rent
- □ Two month’s rent
- □ Three month’s rent
- □ Other (specify): ____________
- □ Agent did not know
- □ Security deposit not required

Length of lease available?

- □ Month-to-month
- □ Three month
- □ Six month
- □ One year
- □ Other (specify): ____________

Which utilities or amenities are included in rent? [check one per line]

<table>
<thead>
<tr>
<th>Utility</th>
<th>Included</th>
<th>Not Included</th>
<th>Agent did not say</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Electric</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>b. Gas</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>c. Water/sewage</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>d. Heat</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>e. Cooling</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>f. Parking</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>g. Cable TV</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>h. Laundry</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>i. Pool/Health Club</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

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 rate the physical condition of the building’s EXTERIOR?

- □ 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
Did the agent make any of the following comments about the surrounding neighborhood?

a. Noise
   - Quiet
   - Noisy
   - No comment

b. Safety
   - Safe/low crime
   - Dangerous/high crime
   - No comment

c. Schools
   - Good
   - Poor
   - No comment

d. Maintenance/Services
   - Good Services/Amenities
   - Poor Services/Amenities
   - No comment

e. Race or Ethnicity?  □ Yes  □ No

If Yes, please describe: _____________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
Unit #5 Address: ____________________________________________

(number) (street) (unit #)

(city) (state) (zip)

Did you inspect this unit?  □ Yes  □ No

Is this the advertised unit?  □ Yes  □ No

Rent: $ _______ /month  Date Available: ___/___/___

# of Bedrooms: _______  # of Bathrooms: _______

How many floors in building? _______  Unit is on what floor? _______

How much of a security deposit is required?  Length of lease available?

□ One month’s rent  □ Month-to-month

□ Two month’s rent  □ Three month

□ Three month’s rent  □ Six month

□ Other (specify):___________  □ One year

□ Agent did not know  □ Other (specify):___________

□ Security deposit not required

Which utilities or amenities are included in rent? [check one per line]

<table>
<thead>
<tr>
<th></th>
<th>Included</th>
<th>Not Included</th>
<th>Agent did not say</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Electric</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Gas</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>c. Water/sewage</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>d. Heat</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>e. Cooling</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>f. Parking</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>g. Cable TV</td>
<td></td>
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<tr>
<td>h. Laundry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i. Pool/Health Club</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 rate the physical condition of the building’s EXTERIOR?

□ 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
Did the agent make any of the following comments about the surrounding neighborhood?

<table>
<thead>
<tr>
<th>a. Noise</th>
<th>b. Safety</th>
<th>c. Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Quiet</td>
<td>□ Safe/low crime</td>
<td>□ Good</td>
</tr>
<tr>
<td>□ Noisy</td>
<td>□ Dangerous/high crime</td>
<td>□ Poor</td>
</tr>
<tr>
<td>□ No comment</td>
<td>□ No comment</td>
<td>□ No comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>d. Maintenance/ Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Good Services/Amenities</td>
</tr>
<tr>
<td>□ Poor Services/Amenities</td>
</tr>
<tr>
<td>□ No comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>e. Race or Ethnicity?</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Yes</td>
</tr>
<tr>
<td>□ No</td>
</tr>
</tbody>
</table>

If Yes, please describe: 

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
18. Did the agent tell you that there was a waiting list for the advertised unit or similar units?  
   □ Yes    □ No

18a. Did the agent offer to place your name on the waiting list?  □ Yes □ No

18b. How many people did the agent say are currently on the waiting list (if applicable)? ____

19. Check if the agent indicated that any of the following were required to obtain a rental unit:

<table>
<thead>
<tr>
<th></th>
<th>Required</th>
<th>Not Required</th>
<th>Agent did not Indicate</th>
<th>Agent Didn’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Application</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>b. Credit Check</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

20. Specify the name and amount of any fee that the agent indicated was required:

<table>
<thead>
<tr>
<th>Fees that must accompany application (e.g. Application Processing, Credit Check, Cleaning Fee, etc.)</th>
<th>Amount of Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>$</td>
</tr>
<tr>
<td>2.</td>
<td>$</td>
</tr>
<tr>
<td>3.</td>
<td>$</td>
</tr>
<tr>
<td>4.</td>
<td>$</td>
</tr>
<tr>
<td>TOTAL FEES</td>
<td>$</td>
</tr>
</tbody>
</table>

21. Were you told of any rent specials or other incentives that you would receive if you were to rent a particular property?  □ Yes □ No

21a. If yes, describe the incentive to renters: __________________________________________________________

22. Were you invited to complete an application?  □ Yes □ No
23. Complete the grid below regarding any of your qualifications to rent that were requested by the agent. *(check only one per line)*

<table>
<thead>
<tr>
<th>Qualification:</th>
<th>Agent Requested</th>
<th>Agent Did Not Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Your marital status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Your family size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Your income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Your spouse's income</td>
<td></td>
<td></td>
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<tr>
<td>e. Your occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Your spouse's occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Your length of employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Your spouse's length of employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i. Your debts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j. Your credit standing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>k. Personal references</td>
<td></td>
<td></td>
</tr>
<tr>
<td>l. Co-signer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>m. other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

24. Did the agent make any of the following comments regarding your qualifications to rent?  
- ☐ You are qualified  
- ☐ You are NOT qualified  
- ☐ Qualifications not discussed

25. Did the agent suggest that you consider a different rental complex or building than the one in the ad?  
- ☐ Yes  
- ☐ No  
25a. If yes, was the other property also managed by the same agency?  
- ☐ Yes  
- ☐ No  
- ☐ Don't know

26. Were any remarks made by the agent about race or ethnicity (other than neighborhoods surrounding recommended units)?  
- ☐ Yes  
- ☐ No  
If Yes, please describe: __________________________________________
  __________________________________________  
  __________________________________________  

27. Were any remarks made by the agent about religion, persons with disabilities, or families 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

STATEMENT OF TESTER

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
1. Control #:  
2. Tester ID #:  

3. Tester Name:  

4. Location of Office:  
   Firm Name (if applicable): ________________________________  
   Office/Room Number: ______________________________________  
   Address: ___________________________________________________  
   (number) (street) (city) (state) (zip)  

5. Date and Time of Site Visit:  
   Date (month/day/year): __/__/__  
   Time began (office arrival): ____:____  
   Appointment Time: ____:____  
   Time ended (departure): ____:____  
5a. Is this your second site visit?  
   Yes  
   No  

6. Information on persons with whom you had contact during your visit  
   [check responses where appropriate]:  

<table>
<thead>
<tr>
<th>Name/Position</th>
<th>Race/Ethnicity (check one entry)</th>
<th>Gender</th>
<th>Age Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>W=White  I=American</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>B=Black  Indian</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>H=Hispanic  O=Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>A=Asian  DK=Don't Know</td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>W</th>
<th>B</th>
<th>H</th>
<th>A</th>
<th>I</th>
<th>O</th>
<th>DK</th>
<th>M</th>
<th>F</th>
<th>18-30</th>
<th>31-45</th>
<th>46-65</th>
<th>65+</th>
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<tbody>
<tr>
<td>1. Name:</td>
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<td>Position:</td>
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<td>5. Name:</td>
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<td>Position:</td>
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</tr>
</tbody>
</table>

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): ____________________________________________

12. Were there any other homes recommended to you that had the same # of bedrooms as the advertised home?
   □ Yes
   □ No
   □ Agent did not know

13. Were there any other homes recommended to you that had a different # of bedrooms than the advertised home, but would still meet your needs?
   □ Yes
   □ No
   □ Agent did not know

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

15. At any time during your visit, did an agent comment on or make reference to Fair Housing Laws?
   □ Yes
   □ No
16. Based on your observations and the remarks of the agent, indicate below the sources used to select properties for your review:

- Multiple listings book(s)
- Home seeker guides/magazines
- Computer
- Internet website - (specify): _____________________________________
- Other printed sheet
- File cards
- Scraps of paper
- Other (specify): ______________________________________________
- None

17. Did one agent refer you to another agent who provided service to you?  
   - Yes  
   - No

17a. If yes, were you referred to an agent within the same agency?  
   - Yes  
   - No

17b. If you were referred, using the numbers from Question 6, enter the number of the person to whom you were referred:  
   [enter line #]

18. Was the agent’s role described to you as being one of the following:  

   - Buyer’s agent
   - Seller’s agent
   - Dual agent
   - Did not disclose

19. Were you asked to sign any agreements or documents?  
   - Yes  
   - No

19a. If yes, please specify each below:

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Purpose</th>
<th>Did you sign?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>3.</td>
<td></td>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

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
22. Complete the grid below regarding any of your qualifications to purchase a house that were requested by the agent at any point. *(check only one per line)*

<table>
<thead>
<tr>
<th>Qualification:</th>
<th>Agent Requested</th>
<th>Agent Did Not Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Your marital status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Your family size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Your income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Your spouse's income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Your occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Your spouse’s occupation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Your length of employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Your spouse’s length of employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i. Your savings/assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j. Your debts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>k. Credit standing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>l. Amount available for downpayment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>m. Reason for moving</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n. other:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

23. Did the agent make any of the following comments regarding your qualifications to buy a home?
   - [ ] You are qualified
   - [ ] You are NOT qualified
   - [ ] Qualifications not discussed

24. Did the agent volunteer to help you find financing?
   - [ ] Yes    [ ] No

25. Did the agent suggest one or more mortgage companies, lenders, or brokers?
   - [ ] Yes    [ ] No

25a. If yes, please list them below:

<table>
<thead>
<tr>
<th>Mortgage Company/Firm</th>
<th>Lender/Broker Name</th>
<th>City</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3.</td>
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<tr>
<td>4.</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
26. Did the agent discuss the type of financing that might be available to you?
   □ Yes  □ No

26a. If yes, please indicate which types of financing the agent discussed or mentioned by filling out the grid below: [check one per line]

<table>
<thead>
<tr>
<th>Financing Type</th>
<th>Discussed</th>
<th>Not Mentioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Conventional Fixed Rate Financing (non FHA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Conventional Adjustable Rate Financing (ARM)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. FHA or VA Financing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Other government financing (state or local) (specify):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Other (specify):</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 could afford: □ [enter line #]

   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

28. Home Price:
   Did the agent suggest a house price or price range that you should consider?
   □ Yes  □ No

28a. If yes, what was the total home price?
   $ ___________________ (lowest) $ ___________________ (highest)

29. Loan/Mortgage Amount:
   Did the agent suggest a mortgage amount ($ borrowed) or range that you should consider?
   □ Yes  □ No

29a. If yes, what was the total loan amount?
   $ ___________________ (lowest) $ ___________________ (highest)

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)  $ _________ (highest)
   Downpayment Percent:  ________% (lowest)  ________% (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:

   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
34. 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

35. INFORMATION ABOUT NEIGHBORHOODS/AREAS DISCUSSED

<table>
<thead>
<tr>
<th>Neighborhood/Area #1</th>
<th>Name of Area: ____________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>This area is:</td>
<td>☐ County ☐ Town or City ☐ School District</td>
</tr>
<tr>
<td></td>
<td>☐ Neighborhood ☐ Don’t know</td>
</tr>
</tbody>
</table>

Did the agent make any of the following comments about this area?

- Noise
  - ☐ quiet
  - ☐ noisy
  - ☐ no comment

- Safety
  - ☐ safe/low crime
  - ☐ dangerous/high crime
  - ☐ no comment

- Schools
  - ☐ good
  - ☐ poor
  - ☐ no comment

- Investment
  - ☐ rising values/good investment
  - ☐ flat values/not much appreciation
  - ☐ declining values/depreciation
  - ☐ no comment

- Public Services
  - ☐ good services/amenities
  - ☐ poor/unreliable services
  - ☐ no comment

- Race or ethnicity? ☐ Yes ☐ No
  If yes, please describe: ____________________________________________
  ____________________________________________
  ____________________________________________

<table>
<thead>
<tr>
<th>Neighborhood/Area #2</th>
<th>Name of Area: ____________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>This area is:</td>
<td>☐ County ☐ Town or City ☐ School District</td>
</tr>
<tr>
<td></td>
<td>☐ Neighborhood ☐ Don’t know</td>
</tr>
</tbody>
</table>

Did the agent make any of the following comments about this area?

- Noise
  - ☐ quiet
  - ☐ noisy
  - ☐ no comment

- Safety
  - ☐ safe/low crime
  - ☐ dangerous/high crime
  - ☐ no comment

- Schools
  - ☐ good
  - ☐ poor
  - ☐ no comment

- Investment
  - ☐ rising values/good investment
  - ☐ flat values/not much appreciation
  - ☐ declining values/depreciation
  - ☐ no comment

- Public Services
  - ☐ good services/amenities
  - ☐ poor/unreliable services
  - ☐ no comment

- Race or ethnicity? ☐ Yes ☐ No
  If yes, please describe: ____________________________________________
  ____________________________________________
  ____________________________________________
Neighborhood/Area #3

Name of Area: ____________________________________

This area is a:  
- County  
- Town or City 
- School District 
- Neighborhood  
- Don't know

Did the agent make any of the following comments about this area?

a. Noise  
- quiet  
- noisy  
- no comment

b. Safety  
- safe/low crime  
- dangerous/high crime  
- no comment

c. Schools  
- good  
- poor  
- no comment

d. Investment  
- rising values/good investment  
- flat values/not much appreciation  
- declining values/depreciation  
- no comment

e. Public Services  
- good services/amenities  
- poor/unreliable services  
- no comment

f. Race or ethnicity?  
- Yes  
- No

If yes, please describe: ____________________________________

Neighborhood/Area #4

Name of Area: ____________________________________

This area is a:  
- County  
- Town or City 
- School District 
- Neighborhood  
- Don't know

Did the agent make any of the following comments about this area?

a. Noise  
- quiet  
- noisy  
- no comment

b. Safety  
- safe/low crime  
- dangerous/high crime  
- no comment

c. Schools  
- good  
- poor  
- no comment

d. Investment  
- rising values/good investment  
- flat values/not much appreciation  
- declining values/depreciation  
- no comment

e. Public Services  
- good services/amenities  
- poor/unreliable services  
- no comment

f. Race or ethnicity?  
- Yes  
- No

If yes, please describe: ____________________________________

_________________________________________________________________

_________________________________________________________________
<table>
<thead>
<tr>
<th>Neighborhood/Area #5</th>
<th>Name of Area:</th>
</tr>
</thead>
<tbody>
<tr>
<td>This area is a:</td>
<td>□ County</td>
</tr>
<tr>
<td></td>
<td>□ Town or City</td>
</tr>
<tr>
<td></td>
<td>□ School District</td>
</tr>
<tr>
<td></td>
<td>□ Neighborhood</td>
</tr>
<tr>
<td></td>
<td>□ Don't know</td>
</tr>
</tbody>
</table>

Did the agent make any of the following comments about this area?

a. Noise
   - □ quiet
   - □ noisy
   - □ no comment

b. Safety
   - □ safe/low crime
   - □ dangerous/high crime
   - □ no comment

c. Schools
   - □ good
   - □ poor
   - □ no comment

d. Investment
   - □ rising values/good investment
   - □ flat values/not much appreciation
   - □ declining values/depreciation
   - □ no comment

e. Public Services
   - □ good services/amenities
   - □ poor/unreliable services
   - □ no comment

f. Race or ethnicity? □ Yes □ No
If yes, please describe: ________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
36. Were any remarks made by the agent about race or ethnicity (other than those regarding specific neighborhoods)? □ Yes □ No
   If Yes, please describe: ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________
   ____________________________________________________________

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

PLEASE REMEMBER TO COMPLETE A RECORD OF RECOMMENDED HOMES FOR EACH HOME RECOMMENDED.

STATEMENT OF TESTER

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
## RECORD OF RECOMMENDED HOMES
*(Complete one form for each address recommended or inspected)*

### 1. Full Address of Home

<table>
<thead>
<tr>
<th>(number)</th>
<th>(street)</th>
<th>(unit)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(city or town)</td>
<td>(state)</td>
<td>(zip code)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 2. Basic Information

<table>
<thead>
<tr>
<th></th>
<th>First Site Visit</th>
<th>Second Site Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Is this the advertised home?</td>
<td>Yes</td>
</tr>
<tr>
<td>b.</td>
<td>Did you inspect the home?</td>
<td>Yes</td>
</tr>
<tr>
<td>c.</td>
<td>How many bedrooms were in the home?</td>
<td>Yes</td>
</tr>
<tr>
<td>d.</td>
<td>What was the current asking price?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### IF HOME WAS INSPECTED ON EITHER VISIT:

3. **What type of building is it?**
   - Single-family detached
   - Duplex
   - Rowhouse or Townhouse
   - Multi-family structure

4. **Is this a newly built home that has never been occupied?**
   - Yes
   - No

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. **How do you rate the physical condition of the home’s EXTERIOR?**
   - 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

7. **Did the agent make any of the following comments about the surrounding neighborhood?**
   - a. Noise
     - Quiet
     - Noisy
     - No comment
   - b. Safety
     - Safe/low crime
     - Dangerous/high crime
     - No comment
   - c. Schools
     - Good
     - Poor
     - No comment
   - d. Investment
     - Rising values/good investment
     - Flat values/not much appreciation
     - Declining values/depreciation
     - No comment
   - e. Public Services
     - Good Services/Amenities
     - Poor Services/Amenities
     - No comment
   - f. Race or ethnicity?
     - Yes
     - No
     - If Yes, please describe: