



| Category | Task | Task Date | Task | Task Hours | Task | Task Notes |
|------------------------------------|---|-----------|---|------------|---|------------|
| Status Report Introductions | | | | | | |
| | Introductory/intake call and send intro call email recap to assignee cc: DPM/Authorizer | | Introductory/intake call and send intro call email recap to assignee cc: DPM/Authorizer | | Introductory/intake call and send intro call email recap to assignee cc: DPM/Authorizer | |
| | Send introductory email | | Send introductory email | | | |
| | Welcome Package | | Welcome Package | | | |
| Area Tour | | | | | | |
| | Research areas of interest to customize tour: preferred neighborhoods, ethnic grocers, medical facilities, schools, gyms, churches, showcase your city etc. | | Research areas of interest to customize tour: preferred neighborhoods, ethnic grocers, medical facilities, schools, gyms, churches, showcase your city etc. | | Research areas of interest to customize tour: preferred neighborhoods, ethnic grocers, medical facilities, schools, gyms, churches, showcase your city etc. | |
| | Pre-trip area tour: Research sample housing and schedule viewings if possible (max 3) | | Pre-trip area tour: Research sample housing and schedule viewings if possible (max 3) | | Pre-trip area tour: Research sample housing and schedule viewings if possible (max 3) | |
| | Prepare customized agenda of area tour and email Assignee 24-48 hours in advance, cc: DPM/Authorizer | | Prepare customized agenda of area tour and email Assignee 24-48 hours in advance, cc: DPM/Authorizer | | | |
| | Accompanied time spent on area tour | | Accompanied time spent on area tour | | Accompanied time spent on area tour | |

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| Settling In | | | | | | |

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| Agendas sent in advance for Settling In appointments | | Agendas sent in advance for Settling In appointments | | | |
| Provide detailed information about bank account set up | | Provide detailed information about bank account set up | | | |
| Bank appointment - Accompanied | | Bank appointment - Accompanied | | Bank appointment - Accompanied | |
| Provide detailed information about applying for the SSN | | Provide detailed information about applying for the SSN | | | |
| SSN appointment - Accompanied | | SSN appointment - Accompanied | | SSN appoinment - Accompanied | |
| Cell phone support | | Cell phone support | | Cell phone support | |
| Provide information on insurance (renter, auto , etc.) | | Provide information on insurance (renter, auto , etc.) | | Provide information on insurance (renter, auto , etc.) | |
| Share car purchase/lease information | | Share car purchase/lease information | | Share car purchase/lease information | |
| Shopping/hobbies/gym/groceries/other | | Shopping/hobbies/gym/groceries/other | | Shopping/hobbies/gym/groceries/other | |
| Provide detailed information about applying for driver's license | | Provide detailed information about applying for driver's license | | | |
| Driver's license appointment - Accompanied | | Driver's license appointment - Accompanied | | Driver's license appointment - Accompanied | |
| Share Basic Medical system info | | Share Basic Medical system info | | Share Basic Medical system info | |
| Wait for rental furniture delivery (if approved by DPM) | | Wait for rental furniture delivery (if approved by DPM) | | Wait for rental furniture delivery (if approved by DPM) | |

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| Home Finding | | | | | | |
| | Research and email properties for consideration in advance of arrival, cc: DPM/Authorizer | | Research and email properties for consideration in advance of arrival, cc: DPM/Authorizer | | Research and email properties for consideration in advance of arrival, cc: DPM/Authorizer | |
| | Schedule property viewings | | Schedule property viewings | | | |
| | Send Home Finding Agenda to assignee in advance of housing tour, cc: DPM/Authorizer | | Send Home Finding Agenda to assignee in advance of housing tour, cc: DPM/Authorizer | | | |

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| View rental properties - Accompanied | | View rental properties - Accompanied | | View rental properties - Accompanied | |
| Confirm that negotiated terms are accurate and included in the lease. Submit unsigned lease to DPM for Lease Summary | | Confirm that negotiated terms are accurate and included in the lease. Submit unsigned lease to DPM for Lease Summary | | | |
| Complete Lease Summary Checklist (Non-US only) | | Complete Lease Summary Checklist (Non-US only) | | | |
| Email Lease Summary to Assignee cc: DPM & Authorizer. Review summary with assignee | | Email Lease Summary to Assignee cc: DPM & Authorizer. Review summary with assignee | | Email Lease Summary to Assignee cc: DPM & Authorizer. Review summary with assignee | |

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| Home Finding | | | | | | |
| | Email fully executed lease to DPM/Authorizer | | Email fully executed lease to DPM/Authorizer | | | |
| | Departure briefing call summary to assignee cc: DPM & Authorizer as applicable | | Departure briefing call summary to assignee cc: DPM & Authorizer as applicable | | | |
| | Conduct Property Condition Report with photos - Accompanied | | Conduct Property Condition Report with photos - Accompanied | | | |
| | Email signed Property Condition Report photos to Assignee and cc; DPM/Authorizer (if Landlord has own form, include in email) | | Email signed Property Condition Report photos to Assignee and cc; DPM/Authorizer (if Landlord has own form, include in email) | | | |
| | Advise on utility registration process and steps | | Advise on utility registration process and steps | | | |
| | Advise on Explain: wear and tear, maintenance procedures, appliances, furnace, smoke detectors, thermostat, water shut-off, and other house mechanicals | | Advise on Explain: wear and tear, maintenance procedures, appliances, furnace, smoke detectors, thermostat, water shut-off, and other house mechanicals | | Advise on Explain: wear and tear, maintenance procedures, appliances, furnace, smoke detectors, thermostat, water shut-off, and other house mechanicals | |

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| | Point out businesses and activities available of interest in the neighborhood | | Point out businesses and activities available of interest in the neighborhood | | Point out businesses and activities available of interest in the neighborhood | |
| School Support | | | | | | |
| | School research | | School research | | School research | |
| | Schedule school visits (as allowed) | | Schedule school visits (as allowed) | | Schedule school visits (as allowed) | |
| | Send Agenda to assignee in advance of school visits cc: DPM & Authorizer | | Send Agenda to assignee in advance of school visits cc: DPM & Authorizer | | Send Agenda to assignee in advance of school visits cc: DPM & Authorizer | |
| | Assist with school registration/enrollment | | Assist with school registration/enrollment | | Assist with school registration/enrollment | |
| Additional task/Misc | | | | | | |
| | Additional task/Misc | | Additional task/Misc | | Additional task/Misc | |
| Lease Renewal | | | | | | |
| | Lease Renewal | | Lease Renewal | | Lease Renewal | |
| Departure | | | | | | |
| | Send introductory email | | Send introductory email | | | |
| | Ensure written notice to vacate is sent to LL | | Ensure written notice to vacate is sent to LL | | | |
| | Departure briefing call summary to assignee cc: DPM & Authorizer as applicable | | Departure briefing call summary to assignee cc: DPM & Authorizer as applicable | | Departure briefing call summary to assignee cc: DPM & Authorizer as applicable | |
| | Secure copy of move in inventory and photos prior to pre-inspection | | Secure copy of move in inventory and photos prior to pre-inspection | | Secure copy of move in inventory and photos prior to pre-inspection | |
| | Confirm landlord acknowledgement of notice to vacate | | Confirm landlord acknowledgement of notice to vacate | | | |
| | Conduct accompanied pre-move meeting and complete pre-inspection summary report | | Conduct accompanied pre-move meeting and complete pre-inspection summary report | | Conduct accompanied pre-move meeting and complete pre-inspection summary report | |

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| Final inspection recommendations: Cleaning, getting rid of items, maintenance and damages issues etc. | | Final inspection recommendations: Cleaning, getting rid of items, maintenance and damages issues etc. | | Final inspection recommendations: Cleaning, getting rid of items, maintenance and damages issues etc. | |
| Send Pre-Inspection Summary Report | | Send Pre-Inspection Summary Report | | | |
| Set timeline and support with removal of personal items, furniture and cleaning | | Set timeline and support with removal of personal items, furniture and cleaning | | | |
| Set move out inspection date - Landlord/property manager and assignee should be present | | Set move out inspection date - Landlord/property manager and assignee should be present | | | |
| Support with utility account closing | | Support with utility account closing | | Support with utility account closing | |
| Conduct move out inspection - accompanied - Send inspection and photos of damages to all | | Conduct move out inspection - accompanied - Send inspection and photos of damages to all | | Conduct move out inspection - accompanied - Send inspection and photos of damages to all | |
| List any damages that require resolution after inspection | | List any damages that require resolution after inspection | | List any damages that require resolution after inspection | |
| Confirm security deposit return method; track return details (may require follow up) | | Confirm security deposit return method; track return details (may require follow up) | | Confirm security deposit return method; track return details (may require follow up) | |
| Support with mail forwarding | | Support with mail forwarding | | | |
| Support with obtaining school and medical records | | Support with obtaining school and medical records | | Support with obtaining school and medical records | |
| Provide information on car sale and insurance closing | | Provide information on car sale and insurance closing | | Provide information on car sale and insurance closing | |
| Confirm actual vacate date of property | | Confirm actual vacate date of property | | Confirm actual vacate date of property | |