

## New Client Portal Request

[Clients that never had a property on record for utility allowance calculations]

**Purpose:** This form establishes UA Client Portal credentials for accessing tenant release packets and utility allowance reports. Questions: [uadept@zeffert.com](mailto:uadept@zeffert.com) or 800.820.4079, prompt 5.

### Billing

Legal Entity:

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D/B/A:

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Address:

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*(Physical address, city, state, zip)*

Name:

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Phone:

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Email:

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### Contact (if different from Billing)

Name:

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Address:

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*(city, state, zip)*

Phone:

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Email:

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**Utility Allowance:** Actual Use, HUD Models, Baselines **Inspection Services:** Capital Needs Assessments, Accessibility, Design Reviews

**Compliance:** File Reviews, Onsite Reviews **Training:** Public, Private, Online, Speaking Engagements

## New Property Setup Survey

[Used to request a utility allowance calculation for a property not previously on record]

**Purpose:** This form is utilized by new and existing clients for establishing a property record in the Client Portal. Questions: [uadept@zeffert.com](mailto:uadept@zeffert.com) or 800.820.4079, prompt 5.

### Step 1: Project Information

<b>Property Name   Management Company</b>  <i>(Physical address, city, state, zip)</i> <b>Address</b>  <b>Phone</b>  <b>Email</b>	<b>Site Manager</b>  <b>Housing Authority</b>  <i>(If applicable)</i> <b>HUD Contract Anniversary Date</b>  <i>(If applicable)</i> <b>HUD Contract Number</b>
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<b>Funding Sources</b> <small>(Check all that apply):</small>	<input type="checkbox"/> <b>LIHTC</b>	<input type="checkbox"/> <b>RD</b>	<input type="checkbox"/> <b>HOME</b>	<input type="checkbox"/> <b>PBRA / HUD Multifamily</b>	<input type="checkbox"/> <b>Voucher</b>	<input type="checkbox"/> <b>Public Housing</b>
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<b>Unit Counts</b>	_____ +	_____ +	_____ +	_____ +	_____ =	
	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom	<b>Total</b>

### Step 2: Utility Companies

Utility Type	Paid By (Select One Only)		Utility Company Name or "N/A"
	Tenant	Property	
Electric	<input type="checkbox"/>	<input type="checkbox"/>	_____
Gas	<input type="checkbox"/>	<input type="checkbox"/>	_____
Water	<input type="checkbox"/>	<input type="checkbox"/>	_____
Sewer	<input type="checkbox"/>	<input type="checkbox"/>	_____
Trash	<input type="checkbox"/>	<input type="checkbox"/>	_____

### Step 3: Heating Sources

	Paid By (Select One Only)		Heating Source (Select One Only)			
	Tenant	Property	Electric	Natural Gas	Bottled Gas	Other
Heating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Water Heating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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