



Preparing for a Management & Occupancy Review (MOR)

- Notify residents at least 48 hours in advance of the MOR that APHA staff will visit some of the units. *Please do not represent us as HUD staff in your notice.* Fax a copy of the notice to the APHA when it is issued.
- Make copies of all forms on Addendum C marked with a checkmark (✓). Have all ready to submit to APHA staff during the MOR.
- Complete Part A of Addendum B (FHEO), Sections I, II, and III. Originals should be provided to APHA staff at the MOR.
- Complete other forms provided with the MOR confirmation letter. Have all ready to submit to APHA staff during the MOR.
- Review the last MOR report and response. If any issues are continuing, be prepared to discuss with APHA staff.
- Be sure your Fair Housing poster and the APHA contact information (known as Attention Residents Notice) are posted appropriately.
- Be on time.
- The Property Supervisor should be present, especially if the previous MOR rating was a Below Average or Unsatisfactory.
- Please have available all tenant files (including split files), move-out files, and rejected applications. Provide a quiet space for reviewers to work, if possible. We'll be out of your way a lot faster if there are no interruptions.
- You may view or print a copy of the Tenant File Review Worksheet (part of the form HUD-9834) from our website or the HUDClips website. We will use the TFRW to document tenant file contents and TTP/HAP calculations. You may want to use the TFRW to conduct your own file review before the MOR.

You can expect APHA staff to:

- Walk the grounds
- Take photos
- Collect documents
- Review tenant files (we may ask for copies of specific documents)
- Ask questions and obtain information so that we can complete the form HUD-9834
- Talk to residents and staff
- Follow up on EH&S and other REAC items
- Visit a sampling of occupied units and two vacant units
- Conduct a closeout meeting – topics to be covered are at the discretion of the Program Specialist. Generally, continuing problems warrant discussion at the closeout meeting. Regardless of the discussion, please do not assume what the rating will be. The rating is determined after a review of documents and reports in addition to the information obtained as part of the site visit.

If you have any questions, please contact your assigned Program Specialist.