Checklist for Unit Files

Section I - Application for Unit Enrollment
- Application
- Photo ID and SSN cards
- Household Eligibility Verification
- Proof of Income Documentation
  - What Definition of Income is Your Program Using?
  - Verification of the Income
- Confidentiality Releases for 3rd Party Reports
- Grievance Policy Sign Off
- Pre-work/intake surveys
- Demographic information
- Case Notes
- Post-work survey

Section II – Property Information
- Verified Deed
- Tax Receipts
- Insurance Declaration
- Photos
- Environmental Review documentation – SHPO, Flood

Section III – Medical Information
- Consent for Release of Information
- Birth Certificated for all children under 6
- Recent blood lead tests for children under 6 or consent for testing
- Copies of Medical Cards (if necessary)

Section IV - Contracts
- Homeowner Participation Agreement
- Sign Off on General Conditions
- Owner Accepts Scope of Work
- Contracts (homeowner)
- Relocation Information/Agreement

Section V – Financial
- Change Orders
- Partial Payments
- Relocation Cost Analysis
- Project Completion Sign Off
- Project Completion and Authorization for Payment (contractor bill)
- Invoices

- Match documentation

Section VI – Correspondence
- Application approval or denial letter
- Contractor appointment/selection letter
- Contract mailing letters
- Closure letter
- On-going Maintenance Plan with sign off

Section VII – Lead/Healthy Homes
- Lead Pamphlet Sign Off
- Lead Inspection/Risk Assessment Report
- Unit sketch
- Dust Wipe Sample Lab Reports
- Clearance Achievement or Failure Notice
- Any miscellaneous Lead Information

Section VIII – Project Information
- Scope of Work – work specifications
- Cost Estimate
- Bidders List Letter
- Request for Proposal
- All Original Bids
- Bid Opening Chart
- Pre Construction Meeting
- Intent to Award
- Occupant Protection Plan
- Abatement Project Notification
- Notice to Proceed
- Building Permit
- Waste Disposal Receipt
- Worker List
- Contractor Licenses/Worker Certificates
- Job Completion photos

_____   _____
Staff Signature Verifying File is complete: Date