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