

Critical Assistance (CA) Program

Client File Checklist

Client Information

HMIS ID #:		
Entry Date:		Exit Date:

Services Provided (check all that apply)

<input type="checkbox"/> Home Repair	<input type="checkbox"/> Rent Assistance
<input type="checkbox"/> Mortgage Assistance	<input type="checkbox"/> Security Deposit Assistance
<input type="checkbox"/> Property Tax Assistance	<input type="checkbox"/> Utility Assistance

Required Documents

1. _____ **Intake application/initial assessment** identifying the client's most pressing needs.

2. _____ Acknowledgement of the **release of information form** for the Critical Assistance program and the Homeless Information Management System (HMIS).

3. _____ Documentation of program eligibility, including **third-party income documentation, income calculation, and need of assistance**.

4. _____ **Landlord verification form** for security deposit and/or rental assistance, if applicable.

5. _____ Documentation of program **enrollment into HMIS**.
Provide a screenshot of the client's enrollment in the program, with entry and exit dates.

6. _____ **Certification** of a **housing inspection** conducted or **self-certification** by the client ensuring that their housing meets basic health and safety conditions.

7. _____ Demonstration of **correspondence** with the client regarding the need for additional documentation, payment approval, and/or denial of assistance.
(i.e. letters, emails, etc.)

If CA funds were used to provide assistance, the following requirement applies:

8. _____ Documentation of a **one-time payment**, including a copy of the past due billing statement and payment made.
(i.e. mortgage statement, general ledger, and check stubs)