**TBRA Client File Checklist**

**Client Information**

|  |  |  |  |
| --- | --- | --- | --- |
| HMIS ID #: |  | | |
| Entry Date: |  | Exit Date: |  |

**Services Provided** *(check all that apply)*

Security Deposit Assistance

Rental Assistance

Utility Assistance

**Required Documents**

|  |  |
| --- | --- |
| INTAKE AND ASSESSMENT | |
|  | TBRA Application | |
|  | Initial Income Determination | |
|  | 3rd Party Income Documentation | |
|  | Zero-Income Affidavit (if applicable) | |
|  | Verification of Homelessness or At-Risk of Homelessness | |
|  | Self-Certification of Homelessness (if applicable) | |
|  | TBRA Briefing Notification | |
|  | Rental Assistance Coupon | |
|  | Client Program Agreement | |
| LEASING | | |
|  | Request for Unit Approval | |
|  | Rent Payment Standard | |
|  | Rent Reasonableness Assessment Form | |
|  | Comparable Unit Documentation | |
|  | Rent Subsidy Calculation | |
|  | Utility Allowance Schedule | |
|  | Initial HQS Inspection (must be passed) | |
|  | If initially failed, utilize new HQS inspection form | |
|  | Lease and Lease Addendum | |
|  | VAWA Lease Addendum | |
|  | Rental Assistance Contract | |
| OTHER DOCUMENTATION | |
|  | Termination and Grievance Policy | |
|  | VAWA Notifications (HUD-5380 & HUD-5382 forms) | |
|  | Releases of Information for All Household Adults (program & Clarity) | |
|  | Lead-Based Paint Rental Disclosure | |
|  | Case Notes (if applicable) | |
| ANNUAL RECERTIFICATION | | |
|  | Annual Income Recertification and 3rd Party Income Documentation | |
|  | Annual HQS Reinspection (must be passed) | |
|  | If initially failed, utilize new HQS inspection form | |
|  | Contract Renewal Explanation (over 24 months) | |