

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
	3 rd Party Income Documentation
	Zero-Income Affidavit (if applicable)
	Statement of Homelessness or At-Risk of Homelessness
	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
	Rent Assistance Payment Documentation (dates, amounts, expenses, & occupancy)
	Case Notes (if applicable)
ANNUAL RECERTIFICATION	
	Annual Income Recertification and 3 rd Party Income Documentation
	Annual HQS Reinspection (must be passed)
	If initially failed, utilize new HQS inspection form
	Contract Renewal Explanation (over 24 months)