

Required Admin Client File Documents

This is required as part of the Client file

The Admin Client file and WX Site Client Files are usually two different files. Admin stays in the office as it has confidential personal information. The WX Site Client File is a working file, which **MUST** be brought to the client home inspections. After the project is closed out the files may be combined, or at minimum, both be accessible for Program Monitoring and Client File Inspection.

- 1. Application:
 - Application Review* completed by the Grantee's intake person;
 - Verify client's signature is on the following documents:
 - *Application*
 - *Fuel Information Form*
 - Appropriate **Landlord – Tenant Agreement Permission to Enter / Rental Agreement** (if rental).
 - *Permission to provide weatherization assistance to the property (required on application or on another form in the WX Site Client File before WX begins)*
- 2. Income qualification
- 3. Ownership verification
- 4. Year home built verification
- 5. Prior WX review
- 6. Prior HERP review
- 7. State SHPO compliance (and DOE if applicable)
- 8. Project costs (materials, labor, freight) [DOE Subgrantees also must include a break-out of DOE funded measures / materials]