

Program Review & Certification Documentation for Client Records

Goal

The goal of this document is to create a reference for Partners to prepare for the annual Program Review & Certification (PR&C) and achieve compliant client records.

Community Shelter Board acknowledges the dedicated work of all Partners serving those experiencing and at risk of homelessness and hope this document will make it easier to comply with regulations associated with each program type.

This document details both required and best practice program and data requirements. It also lists the documents to be kept in client records for CSB and other funder(s) review.

Helpful Documents

Outreach & Emergency Shelter

[Annual PSH or RRH Provider Assessment of Service Needs and Utilization](#)

HAST screening and prioritization assessment ([singles](#) or [families](#))

[Severity of Service Needs Assessment](#)

[Client Acknowledgement of Data Collection Form](#)

[PR&C Monitoring Guide Exhibit 1](#) (page 14)

Homelessness Prevention

[ODJFS TANF Eligibility form](#)

[Annual PSH or RRH Provider Assessment of Service Needs and Utilization](#)

HAST screening and prioritization assessment ([singles](#) or [families](#)) (if applicable)

[Habitability Form](#) (if applicable)

[Lead-based paint inspection, warning, and pamphlet](#) (only if moving into new unit)

[Client Acknowledgement of Data Collection Form](#)

[PR&C Monitoring Guide Exhibit 1](#) (page 14)

Transitional Housing & Rapid Re-Housing

[Annual PSH or RRH Provider Assessment of Service Needs and Utilization](#)

[Severity of Service Needs Assessment](#)

[RRH Annual Income Certification](#)

[FMR/Rent-Reasonableness calculator 10-1-24](#)

[Client VAWA Notice](#)

[Client VAWA Transfer Request Form](#)

[Habitability Form](#) (ESG)

[HQS Inspection](#) (CoC)

[Lead-based paint inspection, warning, and pamphlet](#)

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[Client Acknowledgement of Data Collection Form](#)

[PR&C Monitoring Guide Exhibit 1](#) (page 14)

Permanent Supportive Housing

[Annual PSH or RRH Provider Assessment of Service Needs and Utilization](#)

[Severity of Service Needs Assessment](#)

[Occupancy-Fee-Calculator 7-1-24](#)

[FMR/Rent-Reasonableness calculator 10-1-24](#)

[Client VAWA Notice](#)

[Client VAWA Transfer Request Form](#)

[HQS Inspection](#) (CoC, HOME)

[Lead-based paint inspection](#), [warning](#), and [pamphlet](#)

[Client Acknowledgement of Data Collection Form](#)

[PR&C Monitoring Guide Exhibit 1](#) (page 14)

<u>Program Type</u>	<u>E Standards</u>	<u>F Standards</u>	<u>G Standards</u>	<u>H Standards</u>	<u>J Standards</u>	<u>M Standards</u>
CARR	E3, E6		G1, G2, G4			M3, M5 , M6
Outreach	E3, E6		G1, G2, G4			M3, M5 , M6
ES	E2, E3		G1, G2, G4			M3, M5 , M6
HP	E3, E6	F4	G1, G2, G4	H2*	J2, J4*	M3, M5 ** , M6
TH	E3, E6	F4	G1, G2, G4	H2, H5, H8	J2, J4	M3, M5 , M6
RRH	E3, E6	F4	G1, G2, G4	H2, H4, H5, H8	J2, J4	M3, M5 ** , M6
PSH	E3, E6	F4	G1, G2	H2, H3, H5, H8	J2, J4	M3, M5 , M6

*If new unit and receiving financial assistance

** For Programs that require specific eligibility, documentation of that eligibility is needed (i.e.

Pregnancy-related programs - Pregnancy confirmation, e.g., a doctor's note; for DV programs, signed HMIS data form with DV data fields, or letter from a Victim Service Provider).