



**Department of Planning, Housing & Community
Development
HOME AGENCY MASTER CHECKLIST**

Applicant					
Current Address:					
Property Address:					
Child Under 6 yrs.		HUD #	Units:	Census Tract	Block Group
Loan Amount	\$		Loan Term		
Account Numbers:					

Loan	Amount	Rate	Terms
HOME			

Total # of Units		Total # HOME Units	
Fixed or Floating Units			
High HOME Rent		Low HOME Rent	

Documentation Checklist	
Application	
Appraisal	
Affirmative Marketing Plan	
Developer Financial Statement Review	
Developer Team Summary Review	
Operating Pro forma review	
Rent Profile Analysis	
Development Cost Analysis	
Operating Cost Analysis	
Subsidy Layering Review	
Appraisal/Market Analysis	
Credit Check	
Underwriting	
Eligibility Analysis Completed	
Loan Review Committee Meeting	
Loan <input type="checkbox"/> Approved <input type="checkbox"/> Denied	
Preliminary Commitment Letter	
Environmental	
Environmental Review Completed	
Historic Review Completed	
Phase I Assessment Review	
Zoning Review	

Lead Based Paint Evaluation	
Distribution of lead hazard information Pamphlet	
Lead paint inspection report [if applicable]	
Visual assessment conducted Results of assessment: <input type="checkbox"/> Pass <input type="checkbox"/> Fail	
Distribution of Notice of Lead Hazard Evaluation [w/in 15 days of assessment]	
Relocation Assessment:	
Relocation needed: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Relocation cost: \$	

Financial & Closing	
Title Examination Received:	
Contractor Notified:	
Requested & received checks for closing:	
Closing Document Letter	
H/O Insurance Naming DPHCD	
Closing Date:	
Final payment for completion:	

Rehabilitation	
Application forwarded to Rehab Specialists	
Rehab Specialist Assigned:	
Initial Section 8 Inspection Comp	
Lead Paint Inspection Completed	
Lead Paint Risk Assessment Completed	
Lead Paint Worksheet Completed	
Comparable Units Form	
Preliminary Project Estimate Completed	
Review of Plans and Specification	
Provided Developer Federal Bid Requirements	
Bid Package Completed	
Photograph of Property Received – Before, During and After	
Pre Closing Site Visit	

	From	To
Bidding Period:		
Extension #1		
Extension #2		
Bids Received:		
[1]		\$
[2]		\$
[3]		\$
Contractor Selected: #		
Did Contractor Meet MBE/WBE Goals:		
If Not – is non availability form Completed:		
Contractor checked on debarred list:	Date:	
Pre-Construction Meeting	Date:	
Contract Executed	Date:	
Copy of Building Permit	Date:	
Signed Acceptance of Bid in File		

Documentation Checklist	
Field Reports in File	
Release of Liens Statement	
Final Pay Requisition/Contingency Closeout	
Certificate of Occupancy	
Lead Paint Dust Wipe Samples/ Clearance	
Lead Paint Certificate of Compliance	
Section 3 Final Report	
MBE/WBE Contract Activity Report - Final	
Final Pictures in File	