

Owner Occupied Housing Rehabilitation Project Checklist

Address: _____

Homeowner: _____

Type of rehabilitation work requested: _____
(Roof, Lead, Heating, etc.)

Owner Intake and Eligibility Determination

- | | |
|--|-------|
| <input type="checkbox"/> Completed Application | _____ |
| <input type="checkbox"/> Low/Mod. Income Determination | _____ |
| <input type="checkbox"/> Verification of Mortgage/Deed | _____ |
| <input type="checkbox"/> Tax Status | _____ |
| <input type="checkbox"/> Homeowner's Insurance | _____ |
| <input type="checkbox"/> Environmental Review Record | _____ |

Date Complete /Initials

Date Complete /Initials

- | | |
|--|-------|
| <input type="checkbox"/> Reviewed and Approved | _____ |
| <input type="checkbox"/> Progress Payments | _____ |

Approved Change Orders w/Homeowner Sign-off

#1 Date _____ Reason _____

#2 Date _____ Reason _____

#3 Date _____ Reason _____

Initial Site Visit

- | | |
|---|-------|
| <input type="checkbox"/> Inspection Report (HQS) | _____ |
| <input type="checkbox"/> Photos | _____ |
| <input type="checkbox"/> Lead Test (If not exempt) | _____ |
| <input type="checkbox"/> Lead Hazard Evaluation Notice
(If applicable, Lead Hazard Presumption Notice) | _____ |
| <input type="checkbox"/> Radon Test (If applicable) | _____ |

- | | |
|---|-------|
| <input type="checkbox"/> Punch-list Meeting | _____ |
|---|-------|

Project Completion and Closeout

- | | |
|--|-------|
| <input type="checkbox"/> Final Inspection Performed/
Homeowner Sign-off | _____ |
| <input type="checkbox"/> Completion Photos Taken | _____ |
| <input type="checkbox"/> Approved Final Payment | _____ |
| <input type="checkbox"/> Warranty(ies) Provided | _____ |
| <input type="checkbox"/> Signed Permit Received | _____ |
| <input type="checkbox"/> Final Reports Received
(lead compliance, etc.) | _____ |
| <input type="checkbox"/> Approved Final Payment | _____ |
| <input type="checkbox"/> Financial Agreement (if loan) | _____ |
| <input type="checkbox"/> Promissory Note | _____ |
| <input type="checkbox"/> Mortgage | _____ |
| <input type="checkbox"/> Recorded Documents | _____ |

Specifications and Bidding

- | | |
|---|-------|
| <input type="checkbox"/> Written Plans and Specifications | _____ |
| <input type="checkbox"/> Cost Estimate | _____ |
| <input type="checkbox"/> Bid Packet Complete | _____ |
| <input type="checkbox"/> Invitation to Bid | _____ |
| <input type="checkbox"/> Walkthrough Notice Sent | _____ |
| <input type="checkbox"/> Walkthrough Completed | _____ |
| <input type="checkbox"/> Bid Results | _____ |
| <input type="checkbox"/> Contractor Licenses | _____ |
| <input type="checkbox"/> Contractor Insurance | _____ |
| <input type="checkbox"/> SAM.gov Debarment Check | _____ |
| <input type="checkbox"/> Rehab Contract | _____ |

Construction Monitoring

- | | |
|--|-------|
| <input type="checkbox"/> Preconstruction Meeting | _____ |
| <input type="checkbox"/> Permit Received | _____ |
| <input type="checkbox"/> Notice to Proceed | _____ |
| <input type="checkbox"/> Site Inspection Reports | _____ |
| - Visit 1 with Photos | _____ |
| - Visit 2 with Photos | _____ |
| - Visit 3 with Photos | _____ |
| - Visit 4 with Photos | _____ |