

eHome Counseling Session Checklist

- Required Data:** Intake (9902 requirements), ID or verification of ID.
- File Number:** Client Management System generated number.
- Financial & Housing Affordability Analysis:** See 3-5 D for a full description of what is needed:
<https://www.hud.gov/sites/dfiles/OCHCO/documents/76101HSGHBK.pdf>.
- Activity Log/Client History Log:** Detailed description of each interaction with the client that tells a story. Make sure dates match other file documents.
- Action Plan:** Needs, problems, and what agency and client will do to address them. Make a note that a copy was given to the client.
- Follow-Up:** Note of this should be recorded on the activity log. It should include two follow-up attempts before termination is issued. Make sure to document why follow-up is not possible. Communication can be done through email.
- Pertinent Documents:** If a credit report is collected, then it should be included as well.
- Agency Disclosure to Clients:** Privacy policy, conflict of interest, [For Your Protection: Get a Home Inspection](#), [10 Important Questions to Ask Your Home Inspector](#), and [Lead-Based Paint Disclosure](#). Any records received by the client should be included here as well.
- Termination:** After two follow-up attempts, a termination letter should be sent at 90 days. Communication can be done through email and a cause should be listed.
- Results:** Results of counseling can be documented in the activity log or action plan. Any success as a result of the work together.
- Fees:** A receipt of any charges from services that were provided with communication about an assessment of sliding scale services.
- HUD Housing Counseling Grant Activity:** List all funding sources used for services and the time spent with the client. Make sure there is no double dipping.
- Discussion of Alternatives:** List any resources provided to the client on the activity log or action plan.
- Client Authorization to Order Credit Reports:** If applicable
- Miscellaneous:** Anything not listed above that was collected.
- THDA Certificate of Completion**
- eHome Survey is recommended**