

Education Session Checklist

- File Number:** Client Management System generated number.
- Required Data:** Intake (9902 requirements), ID or verification of ID.
- 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.
- Course Description:** Course title, course outline or established curriculum, and instructional goals.
- Instructors:** Name of each housing counselor, instructor, or presenter.
- Course Logistics:** The date, place, and duration of each session.
- Participant Information:** List of participating households and the race, ethnicity, income data, Limited English Proficiency status (LEP), and Rural Area Status, for each household.
- 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.
- THDA Certificate of Completion**
- eHome Survey is recommended**