

Port In Check Sheet

Self	Manager	Mandatory Documents- all of these should have a hard tab
		Criminal release for all adult members (does not need a tab)
		214 completed for all household members (one per adult)
		USCIS documentation (if applicable) – immigration cards and Verification Consent form
		SSN verification or verified EIV for all household members
		Debts Owed signed for all adult household members
		Debts Owed/rePORTAL/NSOPW run for all adult household members
		Optional Contact Form completed by the head of household
		Electronic Payment Authorization Form for the U.S. Bank ReliaCard
		HUD 9886-A signed by all adult household members
		Disability verification (if applicable)
		Reasonable Accommodation (if approved)
		Release of information/custody/DPA/etc. (if applicable)
		HOH contact information entered in Tenmast (phone number and email)
X		HA Query if Action type is 1= New <input type="checkbox"/> Not currently assisted Admission: <input type="checkbox"/> Currently assisted- recode to Action 4
Checker Approval: _____		Date: _____
Self	Checker	Portability Move In Section
		Tenmast note written about household when move-in processed
		Action type is 1 = New Admission or 4 = Portability Move In
		If Action type is 1= New Admission, tenant is income eligible (meets VLI)
	X	If Action type is 4= Portability Move In and tenant is at \$0 HAP, see S8 Programs Manager
		Certification dates are correct- after the last HAP paid if info is provided by the HA for Portability Move Ins
		Intake HCV Specialist is assigned
		Special Program has line 2n coded correctly (if applicable) – check 58
		Correct Program Type (HCV) and correct Project issued (V999 unless absorbed (V093))
		Correct voucher size is issued
		HCV Briefing Self-Certification form is signed by all adults
		Voucher is signed by both HOH and HCV Specialist with HOH initials on back
		Family Obligations signed and initialed by HOH
		Application is completed in full and signed by applicant/tenant
		EIV from IHA in file (Action type 4 only)
		Income verifications are highlighted to show what income is being used, have tape to show annualized income, are coded correctly, and match the worksheet
		Employment release is signed by all adult household members (1 per adult)
		County release is signed by all adult household members
		Asset verifications are highlighted to show what is being used, have tape to show interest (if applicable), are coded correctly, and match the worksheet
		Expenses are highlighted to show what is being used, have tape to show annualized expenses, are coded correctly, and match the worksheet
		Correct deductions are given
		Self-Certification is completed
		Privacy statement signed by all adult household members
		Briefing appointment letter/reschedule letters in file
		Billing letter sent to IHA (Initial port bill)
		RFTA completed and signed by both tenant and landlord- received before expiration date
		Passed inspection book in file- date of passed inspection is on or before effective date of certification- and date matches the worksheet
		40% completed and in file (if applicable) – see supervisor if any excluded income
		Rent reasonableness completed correctly and matches the RFTA/Inspection book (utility allowance used is for the actual unit size)
		Contract rent matches the RFTA and Inspection book
		Utilities match the RFTA and inspection book
		Correct payment standard is used
	X	Family moving- checked on the 50058 (line 12b)
	X	Lease is tabbed (before rent roll)
	X	HAP Contract is tabbed (before rent roll)
	X	Port billing needed- 50058 and envelope for IHA in file for billing (before rent roll)
	X	Caseworker changed to HCV Specialist before submitting file to RR (note worksheet)

Checker Signature: _____

PORT INTAKE PROCESS

- ❑ Contact client to notify file received and confirm current mailing address, then send briefing packet (pay attention to RFTA vs. No RFTA versions of briefing letter)
 - If you find out that head of household needs an interpreter or they return Interpreter Request form, contact client to determine if they have someone who can translate for them – if they do, send Waiver of Interpretive Services to be completed by head of household and person assisting and tab as ‘Waiver’ above briefing letter. If they do not have anyone who can assist, set up either a phone or video appointment with Language Line or Arch. Note in Tenmast if interpretation was needed and language needed
 - If you find out that client is looking outside of St Paul for unit, ask them to submit this in writing and give file to HCV Programs Manager to return to IHA
- ❑ Review household composition listed on the application.
 - Make sure that you compare the household composition on the application to the one on the 50058. Ok to add any minors (with correct custody paperwork) but will need to get IHA approval for any additional adults that were not included on the 50058.
- ❑ Review file to see if SSN verifications were sent for all household members. If full SSNs provided on 50058 AND verified EIV for all members sent, no need to obtain further verifications.
- ❑ Check for disability
 - If clients check that they are disabled, make sure to request documentation if it was not sent with port and client is not 62+.
- ❑ Review household income, assets, and expenses listed on the application.
 - Client needs to list all sources of income that they are receiving as of that date and all assets that they have access to.
 - If client discloses additional income, assets, or expenses that are not listed on the initial application, resend application so that they can add to it. **DO NOT WRITE ANYTHING ON THE APPLICATION ON BEHALF OF THE CLIENT.**
 - Clients need to provide documentation of all income, assets and expenses listed on the application. Documentation must be within **120 days of briefing date if a port move-in (current participant) or within 60 days of briefing date if a port new admission. Refer to 52665 and the certification type opened to determine if current participant or new admission.**
 - Send a missing information letter if any briefing forms or verifications not returned. Track missing information as noted in the letter with correct follow up
- ❑ Make sure that all paperwork (application, releases, etc.) are completed in full with signatures and dates.
 - This includes SSNs, DOBs, dollar amounts on income, etc.
 - Appropriate boxes are checked/initialed on verifications/releases as needed.
- ❑ If applicant discloses that a child under 6 has been found to have EBLL (elevated blood lead level), request copy of last blood lead level test result and complete EBLL Checklist and email a copy to Inspections Supervisor within 2 business days.
- ❑ If applicant discloses that a household member will move in/out within next 12 months, follow up on situation to determine if further information/revisions to application needed.
- ❑ If applicant reports that an adult in household is a full-time student, request current term’s school schedule and refer to Student Eligibility Checklist to see if further information about financial aid is needed.
- ❑ If applicant discloses criminal activity on Section 8 Self-Certification, check with HCV Programs manager to determine if criminal background check is needed. **DO NOT SUBMIT CRIM FOR VASH NEW ADMISSIONS.**
- ❑ Once all income and asset verifications are in AND unit has passed inspection, process the move in and add note to Tenmast regarding household (including that household meets VLI if new admission). If voucher should be absorbed , route to HCV Programs Manager to absorb after the unit passes inspection and BEFORE move-in cert is finalized.
 - If expense documentation or anything that is optional is not in, there is no need to hold up the file. However, there must be documentation about the request for the expense or optional documentation.

FILE ORDER

LEFT SIDE
HAP (S8 rent worksheet) sheet
Port billing to IHA
Cover Letter
S8 Lease Addendum
Lease
Lead Based Paint Form
HAP Contract
Passed Inspection Letter
Inspection Request
Rent Reasonableness
40% affordability
RFTA
Initial Port bill to IHA
50058 from IHA
52665 from IHA

RIGHT SIDE
Repayment Agreement/Balance Owing Summary Sheet
Criminal Release for all adult members
214 Status for all household members
USCIS Printout for all applicable members /USCIS release
SSN verifs for all members
Debts Owed Form for all adult members
Debts Owed from EIV for all adult members
rePORTAL for all adult members
NSOPW for VASH new adm.
Optional Contact Form
Electronic Payment Authorization US Bank ReliaCard
HUD-9886 A
ROI/RA/POA
Port Check Sheet
Briefing self-certification
Voucher
Family Obligations
HAP (S8 rent worksheet) Sheet
Application
Income verifications
Employment Verification
Ramsey County release form
Asset verifications
Expense verifications
Statement of Assets
Self-Certification
Privacy Form- 1 per adult member
Missing Information Letters
Interpreter Request/Waiver
Briefing letter
IHA Voucher
IHA Port Processing Form