

Weatherization Client File Checklist

All Applicable Forms Must Be Present in the Client File and Must Be in the Order Specified Below

ODOC State QCI	QCI	Agency	Form #	Description	N/A
			Photos	Pre/During/Post Photo for each item listed on work plan Pre/Post/In-Progress Lead Safe Work Photos	Photos on Jump Drive , CD, or Electronic N/A ☐
			Form 39	Client File Checklist	
			Form 22	Wx Client Application	
			Form 26 or 27	DOE or DHS BWR	
			Printout	NEAT/MHEA Audit	
			Printout	NEAT/MHEA Input Report [for QA visits and H&S Justification]	No H&S Justication or QA visit Required N/A ☐
			Receipts	Receipts and Invoices	
			Form 31	Hazardous Materials Disposal Verification	No Hazardous Materials Disposed N/A ☐
			Form 28 A or B	Energy Audit Data Collection Form - A - Site Built, B - Mobile	
			Form 44	Quality Control Report	
			Form 45	Energy Audit Checklist	
			Form 35	Client Satisfaction Form	
			Form 48	Warranties Verification Signature Page	No Warranties N/A ☐
			Form 23	WX Needs Assessment Priority	
			Income	Client Income Documentation	
			Form 30	Occupant Agreement	
			Form 29	Rental Agreement	Home owned by client N/A ☐
			Form 34	Notarized Certification of Zero Income	All occupants 18yrs+ have income N/A ☐
			Form 36	Radon Consent Form	Used form provided with Form 22 N/A ☐
			Pre-ASHRAE	Pre Wx Printout from Residential Energy Dynamics	
			Post- ASHRAE	Post Wx Printout from Residential Energy Dynamics	
			Form 42	Test Kit Documentation	Home newer than 1978 N/A ☐
			Form 43	Renovation Recordkeeping Checklist	Home newer than 1978 or lead testing negative/not needed N/A ☐
			Form 40	Certified Renovator On The Job Progress Log	Home newer than 1978 or lead testing negative/not needed N/A ☐
			Form 25	Client H&S Education Checklist w/Signature	
			Attachment 35	Renovate Right Client Signature	Home newer than 1978 or lead testing negative/not needed N/A ☐
			Form 32	Mold Disclosure	No Mold suspected or identified N/A ☐
			Form 46	Insulation Summary Sheet w/attached Insulation Brand Chart	Insulation not installed N/A ☐
			Copy	Copy of Certified Renovator Certification	Home newer than 1978 or lead testing negative/not needed N/A ☐
			Printout	Third Party Verification of Year Home was Built	
			Section 106 Review Documentation	SHPO Response indicating that no historic properties are affected. <i>[optional documentation, not required - Form 37, Cover Letter]</i>	Home is less than 45 years or work falls within scope of PA N/A ☐
			Other Agency Forms or Correspondence	Not Required	

Filling Out Client Demographics Below is **OPTIONAL**. This form can be used as a cover sheet as well as a checklist if so desired.

Agency: _____	Cont. #: _____	LIHEAP # _____	Job #: _____
App. Date: _____	Start Date: _____	Compl. Date: _____	
Applicant Name: _____		Income: _____	
Address: _____		City: _____	County: _____
Phone: _____	Own: _____	Rent: _____	PPTs: _____
# Elderly: _____	# Hndcp: _____	# Nt. Am.: _____	# Children: _____ # In Household: _____

_____ Site Built	Yr Built: _____	_____ Natural Gas	_____ Electricity
_____ Mobile Home		_____ Lp Gas (Propane)	_____ Wood