RECERTIFICATION TAB Checklist: PSH HMIS #:

|  |  |  |
| --- | --- | --- |
| Participant Name: | Date Completed | Staff Initials |
| HMIS ROI |  |  |
| Universal Release |  |  |
| Self Sufficiency Action Plan |  |  |
| HMIS Annual Assessment-*must be HMIS print out* |  |  |
| Inspection (must be completed at annual recertification) |  |  |
| Signed Renewed Lease |  |  |
| Rental Calculation |  |  |
| Utility Calculation *(if applicable)* |  |  |
| Budget Worksheet |  |  |
| Self-Declaration of Income (Each Adult) |  |  |
| Third Party Verification of Income *(if applicable)* |  |  |
| Paystubs, Social Security Statement, Print Outs, etc. (12 weeks) |  |  |
| Checking/Savings/IRA/Tax Documents/etc. Print Outs *(if applicable)* |  |  |
| Copies of recent Utilities |  |  |
| Staff Recertification-*must be signed by Homeless Housing Management* |  |  |
| Completed tab uploaded into HMIS |  |  |
| Recertification Denial *(if applicable)* |  |  |

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Self Sufficiency Action Plan

Participant Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Action Component | Current Status for Participant | Case Manager Responsibilities | Participant Responsibilities | Date Achieved |
| Income-Type of income |  | Update file as needed |  |  |
| Employment-Name of Employer-indicate Pt/FT status |  | Update file as needed |  |  |
| Housing Situation | CurrentlyHoused | Provide Housing Resource | Comply with lease and program terms |  |
| Food |  | Provide Community Resource | Utilize Food Pantries &SNAP assistance if available |  |
| Childcare |  | Refer to JFS Childcare if applicable |  |  |
| Children’s Education |  | Refer to Head Start if applicable |  |  |
| Adult Education |  | Provide if requested |  |  |
| Legal |  | Refer to SoutheasternLegal Aid (if applicable) |  |  |
| Health Care |  | Refer to JFS for Medicaid if applicable | Maintain JFS apptsor apply if needed |  |
| Life Skills | Refer to Housing History Assessment | Update as needed |  |  |
| Mental Health |  | Refer to Local Mental Health Agency if applicable |  |  |
| Substance Abuse |  | Refer to Local Recovery Agency if applicable |  |  |
| Support Network-Yes or No |  | Determined by participant | Determined by participant |  |
| Transportation |  | Refer to transportation services if applicable |  |  |

Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

Case Manager Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

Budget Worksheet

PARTICIPANT NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| MONTHLY EXPENSES | ActualAmt |
| Rent |  |
| Utilities: Electric PIPP: Y N  |  |
|  Gas PIPP: Y N  |  |
|  Water |  |
|   |  |
| Cell phone  |  |
| Food expenses covered by SNAP benefit  |  ( ) |
| Food expenses (include *ONLY* if HH need exceeds SNAP benefit) \*Calculates @ $75/person weekly (ex: 2 person HH; 75x2=150wkly. 150 x4= 600 monthly) |  |
| Baby Formula and/or Diapers  |  |
| Transportation: (car payment, gasoline or transportation fare) |  |
| Child Care |  |
| Medical (prescriptions, co-pays, medicine needs) |  |
| Insurance (Automobile, Renters) |  |
| Household Supplies |  |
| Personal Needs (clothing, shoes, haircut, etc.) |  |
| Tobacco Use |  |
| School Expenses (school lunch, fees, tuition, books, etc.) |  |
| Installment loans & other Debt Payments |  |
| Child Support Payments |  |
| Savings (please specify) |  |
| Other (please specify) |  |
|  |  |
|  |  |
| A: *TOTAL MONTHLY COSTS* Exclude Food expenses covered by SNAP benefit |  |
| B: *TOTAL NET MONTLY INCOME*Include: Wages, child support, SSI, OWF (any eligible income) *Do NOT include SNAP benefit*. |  |
| C: ADJUSTED MONTHLY INCOME(Total NET Monthly Income – Total Monthly Costs) |  |
| Participant’s Monthly Rent Contribution |  |

 Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

 Case Manager Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

Self-Declaration of Income

Participant Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This is to certify the income status for the above-named individual. Income includes but is not limited to:

* The full amount of gross income earned before taxes and deductions.
* The net income earned from the operation of a business, i.e., total revenue minus business operating expenses. This also includes any withdrawals of cash from the business or profession for your personal use.
* Monthly interest and dividend income credited to an applicant’s bank account and available for use.
* The monthly payment amount received from Social Security, annuities, retirement funds, pensions, disability and other similar types of periodic payments.
* Any monthly payments in lieu of earnings, such as unemployment, disability compensation, SSI, SSDI and worker's compensation.
* Monthly income from government agencies excluding amounts designated for shelter and utilities, WIC, food stamps, and childcare.
* Alimony, child support and foster care payments received from organizations or from persons not residing in the dwelling.
* All basic pay, special day and allowances of a member of the Armed Forces excluding special pay for exposure to hostile fire.

Check only one box and complete only that section

[ ]  I certify, under penalty of perjury, that I currently receive the following income:

Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_ Frequency: \_\_\_\_\_\_\_\_\_\_\_\_\_
Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_ Frequency: \_\_\_\_\_\_\_\_\_\_\_\_\_
Source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount: \_\_\_\_\_\_\_\_\_\_\_\_\_ Frequency: \_\_\_\_\_\_\_\_\_\_\_\_\_

Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  I certify, under penalty of perjury, that I do not have any income from any source at this time and I do not have any support networks that could help me with my housing.

Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Staff Verification
I understand that third-party verification is the preferred method of certifying income for HCRP assistance. I understand self-declaration is only permitted when I have attempted to but cannot obtain third party verification.
*Documentation of attempt made for third-party verification:*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Staff Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Third Party Verification of Income

Participant Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructions for Employer/Payment Source Representative: This is to certify the income received by the above named individual for purposes of participating in the HCRP program. This information will be used only to determine the eligibility status and level of benefit of the household. Complete only the selected section below that includes an authorization to release information.

Please return this form to:
Name & Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Employment Income
Participant Release: I hereby authorize the release of the following employment information.
Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Employer representative to complete this section:
The person named above is employed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_since \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. He/she is paid $\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on a \_\_\_\_\_\_\_\_\_\_\_\_\_basis and is currently working an average of \_\_\_\_\_\_\_\_\_\_\_\_\_hours per \_\_\_\_\_\_\_\_\_\_\_\_.
Additional compensation please specify (if any):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Probability of continued employment: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized Employer Representative Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name, Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address and Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Payments and/or Benefit Income (complete one form for each distinct source of income for person named above)

CIRCLE ONE: Social Security/SSI Pension /Retirement TANF Public Assistance Unemployment Compensation Workers Compensation Alimony Payments Foster Care Payments Child Support Payments
Armed Forces Income Other (pls. specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Participant Release: I hereby authorize the release of the following payment and/or benefit information.

Participant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Payment source representative to complete this section:
Payments or benefits in the amount of $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ are paid on a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ basis. The expected duration of the payments or benefits is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
Authorized Payment Source Representative Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name, Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Address and Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

STAFF RECERTIFICATION OF ELIGIBILITY

Purpose: This form serves as documentation that: (1) the program participant named below meets all eligibility criteria for continued housing assistance; (2) this eligibility determination is based on true and complete information; (3) neither the staff member making this determination nor his/her supervisor are related to the program participant through family, business or other personal ties; and (4) this eligibility determination has not resulted from, nor will result in, any financial benefit to the staff member making this determination, his/her supervisor, or anyone related to them.

Instructions: This form must be completed for each program participant upon the determination of his/her continued eligibility for housing assistance. This form must be signed and dated by the housing staff person and housing supervisor that determine a household’s eligibility for recertification. This form must be kept in the housing program participant’s case file. This form will remain valid, unless different housing staff re‐determines the household’s eligibility, in which, case a new form will be required.

|  |
| --- |
|  Participant Name:  |
|  Program: |
|  Recertification Date: |
| \*List additional members of household: |
|  |
|  |
|  |
|  |

*\*All members in household that will benefit from housing assistance must be listed.*

Required certifications: Each person signing below certifies to the following: (1) To the best of my knowledge, the program participant named above meets all requirements to receive continued assistance under this program. (2) To the best of my knowledge and ability, all of the information used in making this eligibility recertification is true and complete. (3) I am not related to the program participant through family, business or other personal ties. (4) To the best of my knowledge, neither I, nor anyone related to me, has received or will continue receive any financial benefit for this eligibility recertification. (5) I understand that fraud is investigated by the Department of Housing and Urban Development, Office of Inspector General, and may be punished under Federal laws to include, but not limited to, 18 U.S.C. 1001 and 18 U.S.C. 641. (6) I understand that if any of these certifications is found to be false, I will be subject to criminal, civil and administrative penalties and sanctions.

Staff Signature: Date:

Supervisor Signature: Date:

Recertification Denial

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

RE: Permanent Supportive Housing (PSH) Recertification Determination

Dear: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The PSH recertification you applied for has been *denied*. The funds must be utilized by participants with income below 35% of the Area Median Income (AMI); have barriers to maintaining their housing; and meet other program criteria.

This letter is regarding the recent recertification submitted to the PSH housing program. You are not eligible to continue receiving PSH assistance. This decision is based on the following information:

[ ]  Participant does not meet eligibility requirements:

 [ ]  Income at or above 35% of the Area Median Income (AMI)

 [ ]  Housing barriers were not met,

 [ ]  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Recertification was not completed:

[ ]  Required documentation to complete recertification process was never received

[ ]  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Should you have any questions or concerns, please call \_\_\_\_\_\_\_\_\_\_\_ at (\_\_\_) \_\_\_\_-\_\_\_\_\_.

Respectfully,

CASE MANAGER (signature)