

Quality Assurance – Client Files

Here is the list of forms/documentation that should be in a client file (not all will be applicable, depending on the house):

- Final inspection form - signed and dated
- Owner/rental documentation - Proof of ownership OR signed rental agreement
- Income Eligibility Documentation
- Assessment/audit - including output from NEAT or audit software showing SIR
- Work order - include any change orders
- Invoices related to WAP measures
- Lead paint notification documentation
- LSW documentation
- Certified Renovator documentation
- Mold/Moisture assessment
- Other hazard notifications, as applicable
- State Historic Preservation documentation as applicable
- CAZ/Draft/CO test documentation (pre and post-WAP) - this will typically be included in audit and final inspection, but if you keep it elsewhere, be sure to include.
- HVAC system efficiency testing documentation - (pre and post-WAP) - this will typically be included in audit and final inspection, but if you keep it elsewhere, be sure to include.
- Blower door results - pre and post WAP as available (same as above)
- Client satisfaction form

Notes - Include the signed and dated versions as available. We only need the final/signed/most complete version of each file. Multiple copies aren't necessary.

With one of these files, the reviewer should be able to discern:

- Who audited the home,
- Who weatherized the home,
- What was asked for in the audit and in the work order,
- What WAP paid for, and whether the invoice supports the work order (and vice versa)
- Who the final inspector was