

General Information/Eligibility

Service Provider:	Review Date:		
Household ID:			
Type of Event	<input type="checkbox"/> Audit	<input type="checkbox"/> *Stand-alone	
	If stand-alone: <input type="checkbox"/> Emergency <input type="checkbox"/> Non-Emergency		
Ownership Status	<input type="checkbox"/> Owned	<input type="checkbox"/> Rented	
If Rented:	Type of Rental: <input type="checkbox"/> Single <input type="checkbox"/> 2 – 4 unit <input type="checkbox"/> Multi (5+)		
	Rental Agreement present, signed, and dated:		
	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Proof of ownership present	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
EAP application present	<input type="checkbox"/> Yes	<input type="checkbox"/> No	EAP PY:
If previous PY EAP application used, was audit complete by 10/31 (10/1 – 9/30)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
WAP Eligible (LIHEAP, WAP, or Categorical)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Priority Household	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
State Historic Preservation (SHPO) verification completed prior to work start date	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A (standalone)
	SHPO verification date:		
Further SHPO Review required and present	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A
Previous weatherization verification completed prior to issuing work orders	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A (standalone)
	Pre-WX verification date:		
WA Services agreement Completed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date:
Client Participation form Completed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A SA Date:
Completion Certificate Completed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date:
Site Visit/Audit Date	Date:		
Work start Date	Date:		
Final Inspection Date	Date:		
Locked Date	Date:		

Notes:

Paste screenshot for each Contractor from WA Client Payment Summary here

General Workflow

<input type="checkbox"/> Small Purchase (< \$1,100)	
<input type="checkbox"/> Crew:	
<ul style="list-style-type: none"> Documentation for material and labor expenses present and accurate? <small>(Compare payment summary material expenses with accounting documentation for materials purchased)</small> 	<input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> Fund Codes in WA match fiscal documentation (PO/Voucher) 	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Set Price List (compare work order and invoice to price list):	
<ul style="list-style-type: none"> Number of measures reviewed 	Number of measures:
<ul style="list-style-type: none"> Discrepancies identified or measure(s) not listed on set price list. 	<input type="checkbox"/> Yes Explain: <input type="checkbox"/> No
<ul style="list-style-type: none"> Estimated and actual cost on work order match 	<input type="checkbox"/> Yes <input type="checkbox"/> No If no, change order present <input type="checkbox"/>
<input type="checkbox"/> Bid:	
<ul style="list-style-type: none"> Bid Form including bid specifications in file 	<input type="checkbox"/> Yes <input type="checkbox"/> No Brand name listed: <input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> List of contractors sent bid request present \$5000/> (3 bids); <\$4999 (2 bids) 	<input type="checkbox"/> Yes <input type="checkbox"/> No # sent _____ # responses _____
<ul style="list-style-type: none"> Evaluation of responses present 	<input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> Lowest bid chosen 	<input type="checkbox"/> Yes <input type="checkbox"/> No If Not, Reason:
<ul style="list-style-type: none"> Bid award notification sent to all/date noted 	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fiscal Verification (N/A Crew):	
Material/labor split on invoice	<input type="checkbox"/> Yes <input type="checkbox"/> No
Invoice matches WA work orders and bids or set price list	<input type="checkbox"/> Yes <input type="checkbox"/> No If no, change order present <input type="checkbox"/>
Payment authorization includes date/signatures	<input type="checkbox"/> Yes <input type="checkbox"/> No Authorization Date:
Payment authorization, Payment information in WA, and Invoice Match	<input type="checkbox"/> Yes <input type="checkbox"/> No
Payment date (after inspection)	Date: <input type="checkbox"/> Yes <input type="checkbox"/> No
Lien Waiver is present/complete, is marked full/final payment, and amount matches payment	<input type="checkbox"/> Yes <input type="checkbox"/> No
Fund Codes in WA match fiscal documentation (PO/Voucher)	<input type="checkbox"/> Yes <input type="checkbox"/> No

Notes: