THE HOUSING SPECIALIST™

Housing Application & Submission Readiness Toolkit

Check readiness • Coordinate documents • Control quality • Track submission
without confusing submission with approval

Professional Resource #14 • 6 Pages • 66+ Interactive Fields • Printable • Free
Housing Specialist Hub → From Apartment to Placement

Application Information

Specialist Name: _____ **Date:** _____

Organization: _____ **Client / Case ID:** _____

Property Address:

_____

Program: ■ CityFHEPS ■ FHEPS ■ Section 8 ■ Other: _____

Landlord / Broker: _____ **Phone:** _____

1. Application Readiness

Confirm the correct pathway and responsibilities before gathering documents. Submission is not approval.

- ■ Household has an active / approved housing assistance status (verified through authorized records)
- ■ Apartment has been confirmed as available and within applicable rent / bedroom limits
- ■ Client has agreed to proceed with this specific unit
- ■ Correct program pathway identified (CityFHEPS / FHEPS / Section 8 / other)
- ■ Responsible agency and submission method confirmed (portal, email, paper, etc.)
- ■ Roles clarified: what the client provides, what the landlord provides, what the Housing Specialist coordinates
- ■ Any known deadlines or voucher expiration dates recorded
- ■ Supervisor notified if the case has special circumstances or urgency

Key reminder: Submitting a complete package does not guarantee approval. Agency review, inspection (when required) and final authorization remain separate stages.

2. Document Review

Identify every required item and track what is still missing. Incomplete packages are a leading cause of delay.

Client-Side Documents

- ■ Valid identification for all adult household members
- ■ Social Security cards or equivalent (as required by program)
- ■ Proof of income / benefits (current and complete)
- ■ Current housing assistance / voucher documentation
- ■ Any required household composition forms
- ■ Signed client authorizations / releases (as required)
- ■ Other program-specific client documents: _____

Landlord / Property Documents

- ■ Completed landlord / owner packet or program forms
- ■ Proof of ownership or management authority (if required)
- ■ W-9 or tax identification information (if required)
- ■ Lead disclosure / other mandatory disclosures
- ■ Proposed lease or rental agreement draft
- ■ Utility information or responsibility confirmation
- ■ Other owner-side documents: _____

Missing Items Log

Missing Item	Responsible Party	Requested	Due	Received

3. Property & Landlord Coordination

Verify property details and owner-side requirements before the package is considered ready.

Property Verification

- ■ Full legal address and unit number confirmed
- ■ Monthly rent amount confirmed in writing or reliable source
- ■ Rent is within the applicable program payment standard / limit for this household
- ■ Bedroom count matches the household's approved allocation
- ■ Availability / proposed lease start date confirmed
- ■ Utilities responsibility clarified (who pays what)
- ■ Any known building issues that could affect inspection noted

Landlord Coordination

- ■ Landlord / authorized agent has received the correct program forms
- ■ Landlord understands that an inspection may be required
- ■ Primary contact person for the agency is identified
- ■ Expected timeline for returning completed documents discussed
- ■ Any landlord questions or concerns recorded and addressed (or escalated)
- ■ Landlord has been given a realistic overview of the process without guarantees

Outstanding landlord items / notes:

_____
_____
_____
_____

4. Submission Quality Control

Before sending the package, perform a final quality check. Incomplete or inconsistent packages create avoidable delays.

Completeness Check

- ■ All required client documents present and legible
- ■ All required landlord documents present and legible
- ■ All forms signed where signatures are required
- ■ Dates on forms are current and consistent
- ■ Household composition matches across all documents
- ■ Income / benefit figures are consistent across supporting documents
- ■ Property information matches the listing and landlord forms
- ■ No obvious blank required fields remain

Delivery & Confirmation

- ■ Correct submission method confirmed (portal / email / mail / in-person)
- ■ Correct recipient / portal / email address verified
- ■ Package assembled in the order preferred by the agency (if specified)
- ■ Copy of the complete package retained in the authorized system
- ■ Submission date and time recorded
- ■ Confirmation of receipt obtained (screenshot, email, receipt number)
- ■ Client informed that the package has been submitted
- ■ Case notes updated with submission details and confirmation reference

Submission Reference / Confirmation # : _____

Date & Time Submitted : _____

5. Corrections & Follow-Up

Delays and requests for corrections are common. Manage them systematically rather than reactively.

When a Correction Is Requested

- Read the request carefully and identify exactly what is missing or incorrect
- Confirm the deadline (if any) given by the agency
- Determine who must supply the corrected information (client / landlord / specialist)
- Contact the responsible party promptly and document the request
- Set an internal follow-up date before the agency deadline
- Resubmit only the corrected items unless the agency requests a full package
- Update case notes with the correction request and the action taken
- Inform the client of the status without creating false urgency or false reassurance

Correction Log

Date	What Was Requested	Action Taken	Resubmitted

Escalation Triggers

- No response from agency after a reasonable follow-up period
- Repeated requests for the same document already supplied
- Landlord becomes unresponsive after package submission
- Client circumstances change (income, household composition, emergency)
- Voucher or assistance deadline is approaching

6. Final Review & Lessons Learned

After the application reaches a decision (approved, denied, or withdrawn), capture what worked and what can improve.

Outcome

■ Approved ■ Denied ■ Withdrawn by client ■ Withdrawn – unit unavailable ■ Still pending

Final decision date (if known): _____

If denied or withdrawn – primary reason (if known):

_____

Process Review

- ■ Documents were complete on first submission
- ■ Landlord returned forms within a reasonable time
- ■ Any corrections were handled promptly
- ■ Client was kept informed at each major stage
- ■ Case notes accurately reflected the process
- ■ Follow-up dates were met or adjusted appropriately

What I will do differently next time:

_____

_____

_____

Professional Safeguards

This toolkit is a working resource for Housing Specialists. It does not replace official program instructions, employer policies, or agency requirements.

• Always verify current document lists and submission methods with the responsible agency.
• Submission of a complete package is not the same as approval.
• Protect client confidentiality. Store sensitive documents only in authorized systems.
• Never promise approval timelines or outcomes that have not been confirmed by the administering agency.
• Escalate unresolved barriers through your organization's established channels.