

## Checklist for Determination of Approval

|                                |                                 |                                |                                |                              |                                 |                                |                                |
|--------------------------------|---------------------------------|--------------------------------|--------------------------------|------------------------------|---------------------------------|--------------------------------|--------------------------------|
| Agency:                        |                                 |                                |                                |                              |                                 |                                |                                |
| <input type="checkbox"/> BVCAP | <input type="checkbox"/> CAPLSC | <input type="checkbox"/> CAPMN | <input type="checkbox"/> CNCAP | <input type="checkbox"/> UWM | <input type="checkbox"/> NENCAP | <input type="checkbox"/> NWCAP | <input type="checkbox"/> SENCA |
| Client Name:                   |                                 |                                |                                |                              |                                 | Job Number:                    |                                |
| Address:                       |                                 |                                |                                | City:                        |                                 | Phone Number:                  |                                |

### CHECKLIST FOR WEATHERIZATION DETERMINATION FACTORS FOR APPROVALS

Make sure you have the following forms and documents before beginning a weatherization project.

NA

- ☐ ☐ Signed Weatherization Application Form
- ☐ ☐ Completed and Signed Basic Intake Form
- ☐ ☐ Copy of Proof of Home Ownership (Deed, Taxes, or Mortgage Stub)
- ☐ ☐ Copy of the Mobile Home Title
- ☐ ☐ Home Information Survey (Client Questionnaire Form WX13)
- ☐ ☐ Copy of Assistance Letter from Dept. of Health and Human Services (Energy Assistance or ADCX/TANF)
- ☐ ☐ Completed Landlord Agreement/Permission
- ☐ ☐ Income Verification
  - Most recent Social Security or SSI Letter
  - Last 3 months of pay stubs
  - Unemployment Compensation Letter
  - Copy of Social Security Award Letter (SSA, SSDI, or SSI) (For everyone in the household at the time of request)
  - Copy of Your Federal Tax Return (Self-Employment Verification Only)
  - Verification of Any Other Monthly Benefit Amounts (Example: VA pension, retirement/pensions, rental income, 401k, unemployment benefits etc.)
  - Zero Income Verification Form (WX16)

Note: Households with persons receiving either ADC (Aid to Dependent Children) or Supplemental Security Income (SSI) are automatically eligible for free weatherization.

- ☐ ☐ Completed U.S. Citizen Attestation Form WX15 (Required for all adults in the household)
- ☐ ☐ Copy of Most Recent Utility Bills With Account Numbers (Natural Gas & Electric)
- ☐ ☐ Historical (Section 106) Check
- ☐ Other: \_\_\_\_\_