

The table below identifies what must be retained in the Client file for each phase of the Program and which option to select when reporting in the Homeownership Capacity Data Collection System (DCS). Required data points for reporting are identified in Chapter 5.

	Intake	Annual	Program Completion	Outcome*	Client Stopped Communication*
Coaching Agreement/ Disclosure Form	X				
Combined Privacy Act Notice and Tennesen Warning	X				
Data reported in the DCS must be supported with documentation retained in the Client file.	X	X	X		
Credit Report	X	X	X		
Action Plan	X		X		
Client Survey			X		
Outcome				X	
Case Notes	X	X	X	X	X
Select the following option in the DCS for reporting at each phase	Intake Data	Annual Data	Complete both: <ul style="list-style-type: none"> <li>• Program Completion Data</li> <li>• Client Survey</li> </ul>	Select <u>one</u> of the following: <ul style="list-style-type: none"> <li>• Outcome Data – Client Purchased*</li> <li>• Outcome Data – Client Decided Not to Purchase*</li> <li>• Outcome Data – Client Continues to Pursue Homeownership*</li> </ul>	Client Stopped Communication*

\*No further reporting requirements once completed in the DCS.