

The reporting requirements below are for Intake, Annual Reporting, and Program Completion **only**.

| | Item | Intake | Annual | Program Completion | Additional Information |
|----------------------------|-----------------------------------|--------|--------|---|---|
| Basic Info (Intake) | Client Name (First and Last Name) | X | | | Client Name for Primary and, if applicable, Secondary Client. |
| | Program Year | X | | | Choose the Program Year that corresponds with the Program Year that the Client is being counted towards. |
| | Date | X | X | X | |
| | Coach Name | X | | | |
| | Address (Street, City, Zip) | X | | | |
| | County | X | | | |
| | Banking Status | X | | | DCS drop down options include: <ul style="list-style-type: none"> • Banked • Unbanked |
| | 1st Generation Homebuyer | X | | | DCS drop down options include: <ul style="list-style-type: none"> • Yes • No DCS defaults to No |
| Barriers | X | | | Complete Secondary Barrier section, if applicable. DCS drop down options include: <ul style="list-style-type: none"> • Credit • Savings • Budgeting • Emotional Barriers • Debt • None (only available in Secondary Barrier) | |

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| D e m o g r a p h i c s (I n t a k e) | Race | X | | | If Client identifies with multiple races, up to two races may be identified in the DCS. DCS drop down options include: <ul style="list-style-type: none"> American Indian or Alaska Native African American or Black Asian East African or West African Native Hawaiian or Other Pacific Islander White Multi-Racial None (may only be selected in the second Race question in the DCS) |
| | Hispanic | X | | | DCS drop down options include: <ul style="list-style-type: none"> Yes No DCS defaults to No |
| | Number of Adults | X | | | |
| | Number of Minor Children | X | | | |
| | Client Birth Year | X | | | |
| Fina ncia l (Bu dget) | Rent | X | X | X | Monthly rent amount |
| | Savings | X | X | X | Includes all liquid funds in a bank account, cash at home or on hand, Individual Development Account (IDA) account dollars. |
| | Monthly Household Income | X | X | X | Income reported should include gross monthly household income . Use income of all household members who permanently reside in the residence and who contribute to the budget. While the income you provided is monthly, if the gross annual income is less than \$20,000, provide a brief explanation of how this Client will be able to achieve homeownership. |
| | AMI | X | X | X | |
| Cre dit (Cre dit Rep ort) | Credit Score | X | X | X | If pulling multiple, use the lower score of two scores, or middle score if three scores are pulled. Score must be Experian, Equifax, or Transunion. The credit report may be pulled within 30 days of the Intake date. If the Client does not have a credit score, enter 0. When there is more than one Client: Use the lower of the two scores after the above direction has been followed. |

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| | Collections/ Judgments Balance | X | X | X | All Clients: Collections/Judgment payments balance as reported by credit report. Do not include medical or student loan collection/judgment balances. When there is more than one Client: Report the combined balances |
| | Credit Cards/ Unsecured Balance | X | X | X | All Clients: Credit Cards and unsecured loan balance as reported by credit report. When there is more than one Client: Report the combined balances |
| | Student Loan Balance | X | X | X | All Clients: Student loan balance as reported by credit report. When there is more than one Client: Report the combined balances. |
| | Secured/ Auto Loans | X | X | X | All Clients: Auto and other secured loan balance as reported by credit report. When there is more than one Client: Report the combined balances. |
| Oth er | Referral to other service providers | | | X | DCS drop down options include: <ul style="list-style-type: none"> • Yes • No DCS defaults to No |
| | Referral for? | | | X | Include a list of other services that the Client was referred to while receiving coaching (i.e. job coaching, energy assistance, etc.). |
| | Notes | X | X | X | |
| | Time spent coaching Clients (hours) | X | X | X | Report time spent coaching Client (include all Client interaction and time spent on case management specifically for this Client) in quarter hour increments. |

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|---------------|-------------------------------|--|--|---|--|
| Client Status | Client Pursuing Homeownership | | | X | <p>Client Pursuing Homeownership?</p> <ul style="list-style-type: none"> • Yes • No <p>DCS defaults to No</p> <p>If not, why?</p> <ul style="list-style-type: none"> • Too expensive to buy • Not enough savings • Credit too low • Not ready emotionally • Financial difficulties • Other |
|---------------|-------------------------------|--|--|---|--|

Note: Length of reporting timeline will depend on Client need. This timeline is for the purpose of reporting on Client progress only and not how frequently or for how long you should interact with the Client. Coaches are expected to interact with Clients more frequently than the reporting timeframes.