

ADR - REQUIRED DOCUMENTS CHECKLIST

	1. PROPERTY EVALUATION, CONSTRUCTION DETERMINATION, AND PURCHASE	N/A		Date Complete	Initials	Comments
1	Purchase Agreement (or Option)		Submit			
2	Homebuyer Assistance Program Occupancy/Vacancy Certification					
3	Notification to Seller of Voluntary Sale					
4	Environmental Checklist					
5	Historical Clearance, SHPO					
6	Flood Plain Map					
7	Noise Attenuation					
8	Transitional Screening Analysis or Phase I Env Assessment		Recommended			
9	Assessor's Card		Rehab			
10	Initial Inspection		Rehab			
11	Survey					
12	Soil Borings		Recommended			
13	Work Specifications/Blueprints					
14	HERS Rating of Final Plans/Specs		New Construction			
15	Visitability Certification		New Construction			
16	Cost Estimates					
17	Lead Risk Assessment		Rehab			
18	Revised Work Specifications/Blueprints and Cost Estimate		Submit			
19	Zoning Approval					
20	Commitment for Title Insurance		Submit			
21	Settlement Statement					
22	Deed/Title to Property					
23	Property Insurance Policy					
24	Senior financing					
25	ADR Construction Mortgage & Note		OPAL/Submit			
26	As-completed (post-rehab) Appraisal		Submit			
27	Set-up Proforma		OPAL			

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	2. BIDDING AND CONTRACTOR SELECTION	N/A		Date Complete	Initials	Comments
1	Prepared Bid Package					
2	List of Contractors invited to Bid					
3	Copies of bids received					
4	Bid Comparison Summary					
5	Record of Bid Selection					
6	Verification selected contractor(s) is not debarred					
7	Notice to unsuccessful bidders					

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3. CONSTRUCTION MANAGEMENT		N/A		Date Complete	Initials	Comments
1	Contractor(s) License					
2	Contractor(s) Insurance					
3	Contractor(s) Lead Training/Certification					
4	Contract between Contractor(s) and Grantee, including					
4a	Lead Work Contractor attachment		Rehab			
4b	Equal Opportunity Clause (EO 11246)					
4c	Visitability Contract Rider		New Construction			
5	Contract Proforma		OPAL			
6	Recorded Notice of Commencement					
7	Notice to Proceed					
8	Change Orders					
9	Interim Payment / Authorizations / Inspection Requests					
10	Copy of Inspection Reports by local building inspectors					
11	Pre-Drywall Inspection by HERS Rater		New Construction			
12	Sworn Statements					
13	Partial and Final Unconditional Lien Waivers					
14	Lead Clearance Report		Rehab			
15	Lead Based Paint Inspection / Compliance Certification Form		Rehab			
16	Certificate of Occupancy					
17	Final Inspection Report by grantee					
18	Final Inspection Report/Blower Door Test Results		New Construction			
19	Energy Star Rating Certificate		New Construction			
20	Final Payment Request / Authorization					
21	Itemized summary listing all project costs					

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	4. APPLICANT ELIGIBILITY	N/A		Date Complete	Initials	Comments
1	Application					
2a	Income Computation Worksheet		Potential Submission			
2b	Third Party Verification (TPV) Monitoring		Potential Submission			
2c	Family Composition		Potential Submission			
2d	Authorization for Release of Information and Privacy Act Notice					
2e	Declaration of Section 214 Status		Potential Submission			
2f	Checklist (for each person 18 and over)		Potential Submission			
2g	Verifications (income, asset, school, etc.)		Potential Submission			
3	Prequalification from Lender		Recommended			
4	Credit Report		Recommended			
5	Homeownership Counseling Certificate					
6	First Time Homebuyer Status		Recommended			
7	Lead Based Paint Statement (incl Renovate Right for homes built before 1978)		Rehab			
8	Applicant receipt of "Fair Housing: It's Your Right"		Recommended			
9	Pre-Closing Proforma		OPAL			

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	5. SALE / LIEN DOCUMENTS	N/A		Date Complete	Initials	Comments
1	Purchase Agreement between grantee and homebuyer					
2	Good Faith Estimate from lender		Submit			
3	Request Release of Mortgage from MSHDA					
4	Settlement Statement(s) for both buyer and seller		Submit			
5	HB Subsidy Second Mortgage documents		Submit/OPAL			
6	Copies of all closing documents					
7	Final Proforma		OPAL			

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	6. PROJECT CLOSEOUT AND ONGOING MONITORING	N/A		Date Complete	Initials	Comments
1	Client Satisfaction Survey		Recommended			
2	Pre-Warranty Expiration Follow-up		Recommended			