Internal Wellness Checklist for the BOS CoC
Monitoring Tool 2019 – General Recordkeeping

DATE: _____

Recipient Name:	
Project Name:	

Grant Number:		Grant Amount:	

Executed Grant Agreement	
Documentation of Grant Amendment	
Executed Grant Agreement with Sub-recipients	
Documentation sub-recipients are not debarred	
Documentation of annual monitoring of Sub-recipients	
Executed Memorandum of Understanding with Service Providers	
Project Application should be maintained – ensure costs charged against the grant are consistent with the approved budget items identified in the application	
Documentation that Annual Performance Report was submitted timely	
Written CoC Program Policies and Procedures to include	
Intake/Screening Procedure	

Personnel Policies and Procedures	
Termination Policy	
Grievance Policy	
Policy Privacy/Confidentiality Policy	
Drug-Free Workforce Policy	
Policy identifying the involvement of homeless/formerly homeless individuals	
Domestic Violence Policy	
Housing First Policy	
Documentation of participation of homelessness/formerly homeless individuals in policymaking	
Documentation of compliance with environmental review requirements	
Documentation of compliance with fair housing requirements	
Documentation of other federal requirements (i.e. lead based paint)	
Participant Eligibility – Ensure documentation of a participants homelessness or at risk of homelessness status and disability, if applicable, is obtained at intake	
Leasing and Rental Assistance Requirements - Ensure rents charged for a structure or unit assisted with leasing or rental assistance funds	

meet standard FMR or rent reasonableness	
Examination of Income- Ensure participants income documentation is examined at intake and re-examined at least annually	
Housing Quality Standards – Ensure structures or units assisted with CoC funds meet HQS at lease-up and are re-inspected at least annually thereafter	
Use of a Coordinated Entry System – Ensure participants are assessed and referred using the CoC's CE system	
Use of HMIS – Ensure participants are entered in the CoC's HMIS or a comparable database	
Standard Operating Procedures – Maintain policies and procedures for intake, program operation, recordkeeping and sub recipient oversight/ monitoring to ensure that CoC funds are used appropriately	
Financial Policies and Procedures – Maintain fiscal controls, accounting procedures, and procurement procedures to ensure that CoC funds are used appropriately	

Match Sources and Uses- Ensure grant funds, except leasing funds, are matched with no less than 25 percent of cash or in-kind contributions from other sources	