

Applicant Intake Form

	Applicant Name		
1) Full Name:			Date:
First Middle	/ Surname / Maiden	Last	
	Contact Information		
2) Residency Status: □ U.S. Citizen □ Re	sident 🗌 Non-Resident		
	acility Shelter		
4) Occupancy Status: Guest Occupancy Status:	nt □ Homeless □ Ow	n □Rent □Su	ubsidized
Street	Address	Apartme	ent/Unit #
City	County	State	Zip Code
6) Do you live in a rural area? ☐ Yes	□ No (Rural: lo	cated outside of cities and th	ne center of towns)
7) Contact Info: Mobile Phone	Pers	sonal Email Address	 S
De	emographic Informatio	on	
8) Birthdate: (mm/dd/yyyy)/	<i></i>		
9) Gender:	er		
10) Ethnicity: □ Hispanic or Latino □ No	t Hispanic or Latino 🛮 🗘 U	nknown	
11) Race: ☐ African American ☐ American ☐ Other Race ☐ Multi-		Pacific Islander [□ White
12) Primary Language: ☐ English ☐ Spa	nish 🛘 English & Spanis	sh 🗆 Other	
13) Relationship Status: ☐ Married (Living ☐ Not Married (Living	with Spouse) ☐ Married ving Together) ☐ Separat		•
14) Education Status: Last Grade Complete □ Vocational □ Some College (No De		=	
15) Employment Status: ☐ Full Time ☐ Pa ☐ Fixed Income		□ Homemaker □	l Retired
16) Household Annual Income: \$			
17) US Military Service: Currently Service:	ng Disabled Veteran	□ Veteran □	l None
18) Criminal Background: ☐ Yes ☐	No		
19) Have you received assistance from Cath	olic Charities in the past?	☐ Yes ☐ No	
If yes, please explain			

Supplemental Information

•	nt Benefits	21) What Areas of CCD Are You	22) How Did You Hear About
	That Apply)	Interested In?	Us?(Check All That Apply)
☐ TANF☐ Veterans Adm	d Lunch ol Lunch nce sing / (Disability) / (Retirement) Security Income	(Check All That Apply) Adoption After School Diaper Pantry Disaster Relief Employment Financial Coaching Homeless Housing Counseling Immigration Legal Together We Learn Pregnancy & Parenting Refugee Senior Services Summer Camp Ventanilla	□ 211 □ Collateral (Flyers, Brochures) □ Churches □ Mexican Consulate □ Other Nonprofits □ Shelter □ Social Media □ Website □ Word of Mouth

Household Member Information											
23) Number of Adults in Household: Number of Children in Household:											
24) List your household members below — (see last line for example)											
				Gender	Ethnicity			R	ace		
Relationship to Head of Household – Enter Number Below 1) Spouse 2) Son 3) Daughter 4) Other Adult 5) Other Child				Latino c or Latino	erican	dian		der			
First Name	Last Name	Birthdate (mm/dd/yyyy)		Male Female	Hispanic or Latino Not Hispanic or Latino	African American	 American In	Asian	Pacific Island	Other Race	Multi-Race
Example: Maria	Hernandez	02/25/2005	3	Х	Х						



CLIENT RIGHTS & RESPONSIBILITIES ACKNOWLEDGMENT FORM

Our organization's policy includes the belief that all individuals who seek services from Catholic Charities of Dallas have certain rights that will be protected in all policies and procedures. We reserve the right to determine who we believe we can serve appropriately, within the limits of our mission, capacities, and resources.

You have the right:

- 1. To a copy of the client rights and responsibilities explained to you as part of the intake or admission process, and to have it explained in a language that you understand;
- 2. To be treated with respect, dignity and professionalism and receive services free from physical, mental or sexual abuse;
- 3. To receive service based on need and eligibility and not be denied services based on race, color, gender, gender identity, sexual orientation, national origin, age, marital status, religion or disability;*
- 4. To receive services by a qualified program employee that includes an individualized, written service plan, if appropriate, which is reviewed periodically, updated as necessary, and signed by you and the employee;
- 5. To be informed of the service procedures, anticipated length of service period, and scope of service.
- 6. To review a written fee schedule, if applicable, to receive an explanation of your bill for service upon request regardless of source of payment and consequences of nonpayment;
- 7. To not be deprived of any rights, privileges or benefits which are guaranteed to individuals by the state or federal constitution;
- 8. To make a complaint, grievance or suggest changes in service program policies and procedures to an employee, supervisor, director or the Texas Health and Human Services Commission 1-877- 787-8999 or the Texas Department of State Health Services 1-888-963-7111;
- 9. To be informed of your case termination and any further requirements related to the successful termination of your case;
- 10. To request in writing to review, copy and/or receive a summary of your records in the service program office in the presence of the caseworker or employee assigned to your case; A review may be denied or limited where confidentiality could be compromise, or in accordance with applicable law(s).
- 11. To comment on the accuracy of the record and to insert your own statements; an employee may comment or respond to your statements during review, if applicable.
- 12. To have your records secured against unauthorized access; to have any release of information protected by Catholic Charities of Dallas according to all applicable laws and regulations;
- 13. To know that any release of identifiable information will be with your written consent (except when you are a danger to yourself or society); Such consent will include: the specific information to be given, the time period in which this information remains in effect, to whom the information is to be given, and for what purpose it is to be given
- 14. To receive an explanation of any proposed experiment or research procedures and to refuse participation in the experiment or research without jeopardizing your continuing services; and
- 15. To protect your right to privacy in all public relations activities on behalf of Catholic Charities of Dallas.
- 16. To receive services that afford safety, privacy and a smoke free environment.

Your responsibilities are:

- 1. To attend and fully participate in services involving your service plan;
- 2. To provide accurate and necessary information to Catholic Charities of Dallas and to report all changes of circumstances that affect your case or eligibility;
- 3. To treat the caseworker or other persons who serve you with respect; physical threats or verbal abuse is not tolerated; and,
- 4. To make payment(s) for service as outlined in the fee schedule, if appropriate, in a timely manner.

By my signature, I acknowledge that I have read and understand my rights and responsibilities.

Client Name (print):	Date:
Client Signature:	Date:
Case Worker/Employee Signature	Date:
Interpreter, if applicable:	Date:



Program Disclosure-Financial Stability & Career Services

About Us and Program Purpose: Catholic Charities Dallas (CCD) is a nonprofit, HUD approved comprehensive housing counseling agency. We provide free education workshops and a full spectrum of housing counseling including pre-purchase, foreclosure prevention, non-delinquency post-purchase, and rental counseling. We serve all clients regardless of income, race, color, religion/creed, sex, national origin, age, family status, disability, or sexual orientation/gender identity. We administer our programs in conformity with local, state, and federal anti-discrimination laws, including the federal Fair Housing Act (42 USC 3600, et seq.). As a housing counseling program participant, please affirm your roles and responsibilities along with the following disclosures and initial, sign, and date the form on the following page.

Counselor	's Role	s and I	Responsi	bilities
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- Reviewing your housing goal and your finances; which include your income, debts, assets, and credit history.
- Preparing a Client Action Plan that lists the steps that you and your counselor will take to achieve your housing goal.
- Preparing a household budget that will help you manage your debt, expenses, and savings.
- ✓ Your counselor is not responsible for achieving your housing goal, but will provide guidance and education in support of your goal.
- ✓ Neither your counselor nor CCD employees, agents, or directors may provide legal advice.

Client's Roles and Responsibilities

- ✓ Completing the steps assigned to you in your Client Action Plan.
- Providing accurate information about your income, debts, expenses, credit, and employment.
- ✓ Attending meetings, returning calls, providing requested paperwork in a timely manner.
- ✓ Notifying CCD or your counselor when changing housing goal.
- ✓ Attending educational workshop(s) (i.e. pre-purchase counseling workshop) as recommended.
- Retaining an attorney if seeking legal advice and/or representation in matters such as foreclosure or bankruptcy protection.

___ /__ Initials Termination of Services: Failure to work cooperatively with your housing counselor and/or CCD with result in the discontinuation of counseling services. This includes, but is not limited to, missing three consecutive appointments.

Agency Conduct: No CCD employee, officer, director, contractor, volunteer, or agent shall undertake any action that might result in, or create the appearance of, administering counseling operations for personal or private gain, provide preferential treatment for any person or organization, or engage in conduct that will compromise our agency's compliance with federal regulations and our commitment to serving the best interests of our clients.

<u>Agency Relationships:</u> CCD has financial affiliation with HUD, NeighborWorks America, the City of Dallas, and banks including IBERIABANK, Wells Fargo, BB&T, and JP Morgan Chase. As a housing counseling program participant, you are not obligated to use the products and services of CCD or our industry partners.



Program Disclosure-Financial Stability & Career Services

Alternative Services, Programs, and Products & Client Freedom of Choice: CCD has a first-time homebuyer program developed in various partners, including financial institutions and community Realtors. However, you are not obligated to participate in this or other CCD programs and services while you are receiving housing counseling from our agency. You may consider seeking alternative products and services from entities including the Federal Housing Administration (FHA) for first-time homebuyer loan programs, and Transformance of Dallas or the City of Dallas for other first-time homebuyer programs. You are entitled to choose whatever real estate professionals, lenders, and lending products that best meet your needs.

<u>Referrals and Community Resources:</u> You will be provided a community resource list which outlines the county and regional services available to meet a variety of needs, including utilities assistance, emergency shelter, transitional housing, food banks, and legal aid assistance. This list also identifies alternative agencies that provide services, programs, or products identical to those offered by CCD and its exclusive partners and affiliates.

Errors and Omissions and Disclaimer of Liability: I/we agree CCD, its employees, agents, and directors are not liable for any claims and causes of action arising from errors or omissions by such parties, or related to my participation in CCD counseling; and I hereby release and waive all claims of action against CCD and its affiliates. I have read this document, understand that I have given up substantial rights by signing it, and have signed it freely and without any inducement or assurance of any nature and intend it to be a complete and unconditional release of all liability to the greatest extent allowed by law. If any provision of this document is unenforceable, it shall be modified to the extent necessary to make the provision valid and binding, and the remainder of this document shall remain enforceable to the full extent allowed by law.

Quality Assurance: In order to assess client satisfaction and in compliance with grant funding requirements, CCD, or one of its partners, may contact you during or after the completion of your housing counseling service. You may be requested to complete a survey asking you to evaluate your client experience. Your survey data may be confidentially shared with CCD grantors such as HUD.

I/we acknowledge that I/we received, reviewed, and agree to CCD's Program Disclosures.

Client 1	Signature	Date
Client 2 (if applicable)	Signature	Date
Counselor/Coach Name	Signature	 Date



Authorization to Release Information-Financial Stability & Career Services

THE PURPOSE OF THIS IS FOR SERVICE OR CONSULATION.

Catholic Charities Dallas (CCD) and its HUD Counselors/Financial Coaches are committed to ensuring the privacy of individuals and/or families who have contacted us for assistance. We realize that the concerns you bring to us are highly personal in nature. We assure you that all personal information shared orally and/or written will be managed with ethical and legal consideration. Additionally, we want you to understand how we use the personal information we collect about you. Please carefully review this notice as it describes our policy regarding the collection and disclosure of your nonpublic, personal information.

WHAT IS NONPUBLIC, PERSONAL INFORMATION?

It is information that identifies an individual personally and is not otherwise publically available.

INCOME EMPLOYMENT HISTORY RACE OR ETHNICITY
CREDIT HISTORY FINANCIAL DEBT FINANCIAL HISTORY

WHAT PERSONAL INFORMATION DOES CCD COLLECT ABOUT YOU?

We collect personal information about you from the following sources:

Applications, forms, email, or verbally that you provide

EMPLOYER

- Your transactions with us, our affiliates, or others
- Information we receive from your creditors or employment references provided by you
- Credit Reports

NAME

WHAT INFORMATION DO WE DISCUSS AND WITH WHOM?

Federal, State, and nonprofit partners for program review, monitoring, auditing, research, and/or oversight purposes, and/or any other pre-authorized individual and/or organization. Additionally, if you request us to speak on your behalf, we will discuss your information with financial service providers (such as companies providing home mortgages.)

EXPENSES

OCCUPATION

ACCOUNT NUMBERS	ASSETS	INCOME	CREDIT SCORES
CREDIT BUREAU REPORT	S CREDIT HISTORY	CREDIT WORTHINE	SS
manner as to perso future programs.		ay. It is done to evaluat	will not be disclosed in any te our programs and design
we mamtam physic	ai, electronic and procedu	rai safeguarus to protec	ct cheft information.
Client Name	Signature	Date	
 Counselor Name	 Signature	 Date	

HUD > Program Offices > Housing > Single Family > Inspectors > Ten Important Questions to Ask Your Home Inspector

Ten Important Questions to Ask Your Home Inspector

1. What does your inspection cover?

The inspector should ensure that their inspection and inspection report will meet all applicable requirements in your state if applicable and will comply with a well-recognized standard of practice and code of ethics. You should be able to request and see a copy of these items ahead of time and ask any questions you may have. If there are any areas you want to make sure are inspected, be sure to identify them upfront.

2. How long have you been practicing in the home inspection profession and how many inspections have you completed?

The inspector should be able to provide his or her history in the profession and perhaps even a few names as referrals. Newer inspectors can be very qualified, and many work with a partner or have access to more experienced inspectors to assist them in the inspection.

3. Are you specifically experienced in residential inspection?

Related experience in construction or engineering is helpful, but is no substitute for training and experience in the unique discipline of home inspection. If the inspection is for a commercial property, then this should be asked about as well.

4. Do you offer to do repairs or improvements based on the inspection?

Some inspector associations and state regulations allow the inspector to perform repair work on problems uncovered in the inspection. Other associations and regulations strictly forbid this as a conflict of interest.

5. How long will the inspection take?

The average on-site inspection time for a single inspector is two to three hours for a typical single-family house; anything significantly less may not be enough time to perform a thorough inspection. Additional

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inspectors may be brought in for very large properties and buildings.

6. How much will it cost?

Costs vary dramatically, depending on the region, size and age of the house, scope of services and other factors. A typical range might be \$300-\$500, but consider the value of the home inspection in terms of the investment being made. Cost does not necessarily reflect quality. HUD Does not regulate home inspection fees.

7. What type of inspection report do you provide and how long will it take to receive the report?

Ask to see samples and determine whether or not you can understand the inspector's reporting style and if the time parameters fulfill your needs. Most inspectors provide their full report within 24 hours of the inspection.

8. Will I be able to attend the inspection?

This is a valuable educational opportunity, and an inspector's refusal to allow this should raise a red flag. Never pass up this opportunity to see your prospective home through the eyes of an expert.

9. Do you maintain membership in a professional home inspector association?

There are many state and national associations for home inspectors. Request to see their membership ID, and perform whatever due diligence you deem appropriate.

10. Do you participate in continuing education programs to keep your expertise up to date?

One can never know it all, and the inspector's commitment to continuing education is a good measure of his or her professionalism and service to the consumer. This is especially important in cases where the home is much older or includes unique elements requiring additional or updated training.

Return to inspectors home

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OMB Approval No: 2502-0538 (exp. 04/30/2018)

U.S. Department of Housing and Urban Federal Housing Administration (FHA)



For Your Protection: Get a Home Inspection

Why a Buyer Needs a Home Inspection

A home inspection gives the buyer more detailed information about the overall condition of the home prior to purchase. In a home inspection, a qualified inspector takes an in-depth, unbiased look at your potential new home to:

Evaluate the physical condition: structure, construction, and mechanical systems; Identify items that need to be repaired or replaced; and Estimate the remaining useful life of the major systems, equipment, structure, and finishes.

You Must Ask for a Home Inspection

A home inspection will only occur if you arrange for one. FHA does not perform a home inspection.

Decide early. You may be able to make your contract contingent on the results of the inspection.

Appraisals are Different from Home Inspections

An appraisal is different from a home inspection and does not replace a home inspection. Appraisals estimate the value of the property for lenders. An appraisal is required to ensure the property is marketable. Home inspections evaluate the condition of the home for buyers.

FHA Does Not Guarantee the Value or Condition of your Potential New Home

If you find problems with your new home after closing, FHA cannot give or lend you money for repairs, and FHA cannot buy the home back from you. Ask a qualified home inspector to inspect your potential new home and give you the information you need to make a wise decision.

Radon Gas Testing and other safety/health issues

The United States Environmental Protection Agency and the Surgeon General of the United States have recommended that all houses should be tested for radon. For more information on radon testing, call the toll-free National Radon Information Line at 1-800-SOS-Radon or 1-800-767-7236.

Ask your home inspector about additional health and safety tests that may be relevant for your home.

Be an Informed Buyer

It is your responsibility to be an informed buyer. You have the right to carefully examine your potential new home with a qualified home inspector. To find a qualified home inspector ask for references from friends, realtors, local licensing authorities and organizations that qualify and test home inspectors.



HUD-92564-CN (6/14)

