

INVOICE DOCUMENTATION REQUIRED

(Payment Request Policy)

Individual Financial Counseling

Include the following documentation with submissions:

1. Request for Payment Form
 2. Individual Financial Counseling Client List
 3. Must be agency-shared if HCO (*if not agency-shared with CHFA, invoice will be returned*)
 4. If using CMAX, please provide a copy of the case notes for each client.
 5. CHFA's approval email with invoice, if approved for additional sessions.
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Additional Reminders:

- ✓ Follow the Sample Case Notes for clients receiving the Individual Financial Counseling sessions to ensure notes are entered accordingly and acceptable to CHFA for payment. The Case Notes must include that the housing counselor identify and discussed with client at *least three (3) alternatives or options* available to the client.