



FY26 CSB Monitoring Training Q&A (Session 2)

A Considered Response to Partner Agencies' Annual Monitoring Questions

Partner Agency Whitepaper

June 2026 (Q&A Session)

Questions by Participant:

Meredith Leider

1. How often are case notes supposed to be uploaded into Clarity, and where should they go?

Answer:

Case notes do not need to be continuously uploaded throughout the year solely for monitoring purposes. Client documentation is uploaded when files are selected for review. For FY26, documentation should be organized according to the monitoring tools. Case notes belong in the Client File Documentation portion of the upload. Client-level documentation is maintained in Clarity, not SharePoint.

2. Will uploaded case notes be visible to everyone?

Answer:

No. Clarity permissions can be configured so that documents are visible only to the originating agency. Broader access would require a larger system discussion. This was confirmed during the session by Jennifer McCloskey-Haas.

3. Do all files need to be uploaded, or only those selected for monitoring?

Answer:

Only files selected for monitoring are required to be uploaded unless the agency routinely uploads documents for all clients. Jennifer McCloskey-Haas confirmed this during the session.

Jenny Crabtree

1. Will charts be reviewed before the scheduled monitoring dates?

Answer:

No. Reviews occur during the scheduled monitoring period. This provides agencies with time to ensure documentation is complete before the review begins. Jennifer McCloskey-Haas confirmed this during the session.

Jayde

1. Do we have to upload the entire client file into the File tab in Clarity?

Answer:

No. CSB materials emphasize uploading documentation required for monitoring, not necessarily every document contained in a paper chart. Client documentation should be organized according to the monitoring tool and limited to supporting documentation relevant to the review.

2. Can we simply scan all case notes into the File tab?

Answer:

Yes, provided the documentation is organized and supports the monitoring requirements. However, HUD and CSB focus on meaningful documentation rather than volume. Agencies should upload only documentation necessary to support compliance.

Cara Cox

1. Is there a required naming convention for uploads?

Answer:

Yes. Jennifer McCloskey-Haas indicated that an existing naming convention already exists and that updated guidance would be incorporated into the CSB UFA Monitoring Handbook Appendix L and distributed to agencies.

For each client, upload **only two PFD files**:

1. **Client Case File Documentation.pdf**
 2. **Client HMIS Data Supporting Documentation.pdf**
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Amanda Brennan & Katie Elsass

1. What documentation supports the requirement that staff attend training?

Answer:

Acceptable documentation would generally include:

- Training logs.
- Attendance sheets.
- Certificates of completion.
- Sign-in sheets.
- Agendas and calendars.
- Learning management system reports.

HUD and 2 CFR Part 200 emphasize maintaining documentation sufficient to demonstrate compliance and internal controls. Meeting minutes or supervisory records may also serve as supporting evidence.

2. Should supplemental documentation be uploaded to support narrative responses in the Monitoring Handbook?

Answer:

Yes. The Handbook identifies green-highlighted sections that require narratives and provides "Suggested Documentation to Demonstrate Compliance." These suggested documents are intended to support the narrative responses and demonstrate implementation of the processes described.

3. Where should supporting documentation for narratives be uploaded?

Answer:

Supporting documentation should be uploaded to the structured SharePoint folders established for organizational, fiscal, and procedural documentation. Client files should not be uploaded to SharePoint.

4. There is a SharePoint folder labeled "Handbooks." Are agencies expected to upload documents there?

Answer:

Yes, for supporting documentation requested in the CSB UFA Monitoring Handbook.

5. Requirement 576.401 asks for a description of intake and assessment processes and references ESG definitions. Does this narrative apply only to ESG programs?

Answer:

Yes. Section 576.401 is an ESG regulation governing evaluation of participant eligibility and needs. Therefore, narratives written specifically under §576.401 should apply to ESG-funded programs. CoC-funded projects are governed by 24 CFR Part 578 and corresponding written standards. The definitions of “At Risk” and “Homeless” at the beginning of the ESG section also apply for the CoC or 24 CFR 24 Part 578.

Katherine Weathers

1. Does CMHA provide copies of recertifications?

Answer:

1. Verification Sent to Current Landlords

Your active landlord is automatically notified by CMHA as part of the Housing Choice Voucher (HCV) administrative process:

- The Lease Addendum Notice: Once CMHA fully processes and approves your remote annual reexamination packet, they officially notify both you and your

landlord. This notice details your updated household portion of the rent and how much CMHA will pay in housing assistance.

- The CMHA Landlord Portal: Your current landlord can check upcoming payment schedules, lease contract details, and finalized changes directly by logging into the secure [CMHA Landlord Portal](#).

2. Verification Sent to External Housing Programs & Prospective Landlords

If you are applying to an outside agency (such as a different affordable housing development, a separate state assistance program, or a prospective property owner), CMHA operates under strict confidentiality protocols:

- **Signed Consent is Mandatory:** CMHA will not share your data without a signed release form. You must complete and sign the HUD-9886 Authorization for the Release of Information or an official CMHA consent waiver.
- **Official Written Requests:** Prospective landlords or external program administrators must submit a formal written request to CMHA. CMHA reserves the strict right to verify that the person or organization requesting the information is an actual authorized agent before releasing any files.
- **Voucher Portability (Port-Outs):** If you are transitioning to an entirely different housing authority outside of Columbus, CMHA handles this automatically via the Portability department. They will securely package and transfer your full, verified recertification files directly to the incoming housing agency.