



My “Must Have” Papers

Community of Practice, Northeast Massachusetts 2011

There are some papers that everybody must have. Here are some tips about keeping and protecting your important personal records and information.


Get a Binder or Folder to Keep Important Documents – an “accordion folder” works really well

What to Keep in Your Wallet or Purse

- State ID or Driver’s License
- SNAP Card
- Health Insurance Card
- Important numbers
- Appointment Book / Calendar
- ATM Card (only if needed)
- Who to call in case of emergency
- List of medications & what doctor prescribes them.

What to keep in your Binder

- Education documents
- Medical information
- Housing / Utilities information
- Work information
- Financial information
- Learn more about these on the other side of this paper



Essential Documents to Have

These documents can help you get the other information you may need. You only need 2 of these to get a job and fill out the necessary paperwork.

Birth Certificate **Social Security Card** **State ID or Drivers License**

Passport: This document can replace all of the essential documents listed above

If you need to get your birth certificate: Go to the Town Clerk or City Hall in the town/city you were born in and request it. If you were born further away you can contact the Town Clerk/City Hall (via internet or phone) and ask how to get it. Most often there is a fee (up to about \$25). You may also ask a DCF/DMH/DYS worker if they either have a copy or can assist you.

If you need to get a License/ID/Permit: Go to the Registry of Motor Vehicles (RMV). You will need the required ID. Sometimes if you don’t have enough forms of ID (such as a birth certificate and social security card) a letter from DMH or DCF may be helpful explaining your situation. MASS.gov/RMV has more info about this.

To get a social security card: You, or your representative payee, will need to present your ID to the Social Security office and request a new card. (there is a limit to the number of cards you can request in your lifetime so it is important you keep it safe). Don’t keep your social security card in your wallet unless you are using it that day to apply for a job- store it somewhere safe. Try to memorize the number.

To get a passport: Go to your local post office or check with your state’s Passport Agency for details.

If you keep information such as a social security number or bank information in your phone be sure to password protect it in case you get a new phone, or your phone is lost or stolen.

What to Keep in your Binder

Education Documents (these are important for school, college, vocational programs, etc.)

- A copy of transcript from all schools attended or GED Certificate
- Most recent IEP or 504 Plan
- Any other certifications (CPR/First Aide), Vocational, CNA, Etc.
- College information: Financial aid information (including passwords), & transcript
- Print copies of any email confirmations you get & keep them too

Medical Information

- Copy of most recent physical & immunizations (important for school & jobs)
- List of doctors names & numbers (keep a copy in your binder & your wallet)
- List of medications, times, dosages, & who prescribes them (keep a copy in your binder & your wallet)

Work Information

- List of references – first & last names, their position, the company name, phone number, & dates worked
- Copy of letters of recommendations if you have them (don't give your last one away)
- Dates of places you have worked or volunteered & what your responsibilities were
- Work Permit – if you need it (you must get this through your school or city hall)

Housing / Utilities Information

- Phone billing contracts & the most recent 2 bills
- Copy of your Lease
- Keep a list with your previous & current landlord's name, contact info, & the dates you lived there
- Most recent 2 gas, electric, cable bills & contracts
- Any housing list / subsidy information, copies of places you have applied
- Start & end dates to where you previously lived, the landlord name, phone number & a written reference is even better

Financial Information

- A bank book or most recent statement
- Most recent Social Security award letter
- Keep all pay stubs
- Anything Social Security sends you
- All credit/debit card information
- Tax documents: Yearly W-2's, tax documents

You can also make folder on your computer or email and keep a lot of this information there – like important emails or confirmations.

What information You Should NOT Give Out?

- Do not give out passwords (computer, PIN for Bank, Financial Aide, etc.)
- Keep passwords and logins in a safe place for your own personal use
- Social Security numbers (but sometimes it's OK, like on a job or housing application or for a bank application)
- Bank account information (unless for direct deposit of paychecks requested by employer)



Download at: http://labs.umassmed.edu/transitionsRTC/Resources/publications/Tipsheets_and_Briefs.html

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