CHOICES IN COMMUNITY LIVING

Checklist for New and Exiting Clients

- Social Security Card (Original)
- Medicaid Card (Current)
- Birth Certificate (Original)
- Award Letter for SSA, SSI and/or VA
- Copy of last pay stub
- Irrevocable Funeral Policies for funeral or cemetery
- Life insurance polices
- Guardianship Docs including current address/number of guardian
- Recent bank statement(s) for any accounts that are used by client
- Irrevocable trusts
- Food stamp card and amount

The above documents must be obtained prior to move-in for our records and/or given to new provider/payee upon move out/transfer. Please sign/date below and attach w/ packet.

Name of person transferring docs: _____ Date_____

Name of person receiving docs:_____Date_____