



## My “Must Have” Papers [English and Spanish versions]

Item Type	Transitions ACR
DOI	<a href="https://doi.org/10.7191/pib.1062">10.7191/pib.1062</a>
Rights	Copyright © University of Massachusetts Medical School.
Download date	27/03/2023 19:54:00
Item License	<a href="http://creativecommons.org/licenses/by-nc-sa/3.0/">http://creativecommons.org/licenses/by-nc-sa/3.0/</a>
Link to Item	<a href="http://hdl.handle.net/20.500.14038/44349">http://hdl.handle.net/20.500.14038/44349</a>



# My “Must Have” Papers Managing the Paperwork of Adulthood

Tip Sheet

Transitions to Adulthood Center for Research

Revised March 2023

There are some personal papers that everybody must have, such as a birth certificate, license if you drive a car (or State ID if you don't), or a student ID if you are a college student. Here are some tips about keeping and protecting your important personal records and information. If this feels like a lot of information, sometimes an older family member or friend with experience can help you acquire and organize these documents.



## Essential Documents to Have

You should bring two of these with you to complete work-related paperwork.



Birth Certificate\*



Social Security Card\*



State ID or Driver's License or REAL ID  
(keep on you when out)



Passport\*

\*These items should be kept very secure. We suggest a fire-proof box, safe in your home or a safety deposit box at your bank.

Your license (or ID) is the only one of these essential documents which you should carry on you at all times. You won't need to access the others very often so you (perhaps with your guardians) can decide who should store them. Note that a birth certificate and social security card can be replaced but they require some effort. Also a passport needs to be renewed every 10 years. For things like confirming your identity, often a passport can be used instead of the other essential documents listed here. Also be careful as to who has your social security number.

## Items to Keep on You When You Are Away from Home (Either Physically or on Your Phone)

- ☐ Driver's License, School or Work ID
- ☐ Green Card or Visa, if applicable
- ☐ Bus or Subway Pass if you use one
- ☐ SNAP Card (if you qualify for food benefits/ food assistance through a state program)
- ☐ Health Insurance Cards (medical, dental, vision, prescription, etc.)
- ☐ Roadside Assistance Info (like AAA card)
- ☐ Important phone numbers
- ☐ Appointment Book / Calendar (if you keep this on your phone, remember to keep your phone charged and backed up)
- ☐ ATM Card (only if needed)
- ☐ Who to call in case of emergency (most cell phones offer a place to add emergency contacts that anyone can access in an emergency)
- ☐ List of allergies, medications & the doctor who prescribes them

## Items to Have in Binder or Electronically (Organized by Type of Info)

### *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 Aid), Vocational, CNA, Etc.
- ☐ College information: Financial aid information (including passwords), & transcript
- ☐ Copies of any email confirmations you get

### *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 or phone)
- ☐ List of medications, times, dosages, & who prescribes them (keep a copy in your binder & your wallet or phone)
- ☐ Health insurance policy information
- ☐ COVID vaccination card(s)

### *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)
- ☐ Current resume or 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)
- ☐ Unemployment records

### *Housing / Utilities Information*

- ☐ Phone billing contracts & the two most recent bills (shred or get rid of old bills)
- ☐ Copy of your Lease
- ☐ Keep a list with your current landlord's name, contact info, & prior landlords, the dates you lived there, & any references they've given you.
- ☐ Two most recent gas, electric, cable bills & contracts (shred or get rid of old bills)
- ☐ Any housing list / subsidy information, copies of places you have applied

### *Financial Information*

- ☐ The most recent statements from any bank accounts
- ☐ 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 (need to keep for many years)

It's also important to keep a secure list of your online passwords somewhere. You can do this by printing out a list and storing it safely or by using a password manager app. (Note that using multi-factor authentication (MFA) with any apps that include personal or financial information about you is important.)

**You can also make folder on your computer, phone, or email and keep a lot of this information there — like important emails or confirmations. Know how to access it to print it if needed.**

## What If I Don't Have...

### *To get your birth certificate:*

The Town Clerk or City Hall in the town/city you were born will have this. Visit in person, call, or check their website for details on how to get it. Often there is a fee. You may also ask a DCF/DMH/DYS worker if they either have a copy or can assist you. Visit <https://www.usa.gov/replace-vital-documents> for information on how to replace your vital records.



### *To get a License/ID/Permit:*

Go to the Department/Division of Motor Vehicles (DMV) in your state in person or online. 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 the Department of Mental Health (DMH) or Department of Children & Families (DCF) may be helpful explaining your situation.



### *To get a social security card:*

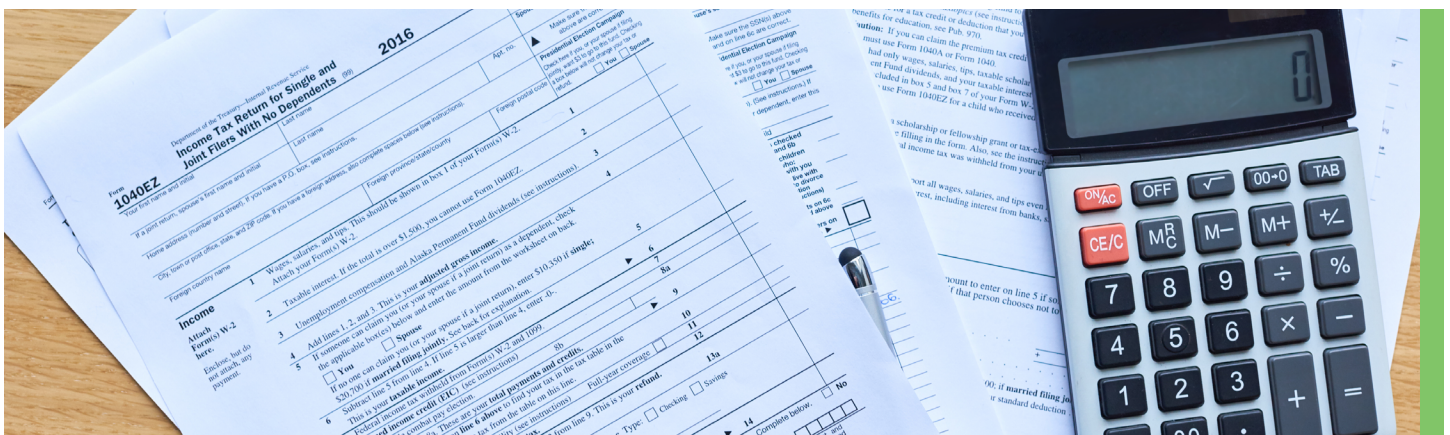
You, or your representative payee, will need to present your ID to the Social Security office and request a new card. (There is a limit to the number of cards you can request in your lifetime, so it is important you keep it safe). Don't keep your social security card in your wallet unless you are using 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 visit <https://travel.state.gov/content/travel/en/passports.html> for information. Always make sure you are on the actual government website before entering your information. Be aware of fake sites to avoid being scammed. You will need a photo to apply for a passport. You may have to bring one or the post office may take it for you.

### **Remember!**

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 information Should You NOT Give Out?

- Do not give out passwords (computer, PIN for Bank, Financial Aid, etc.)
- Keep passwords and logins in a safe place for your own personal use
- Social Security numbers (times it's okay to share: new employment paperwork, housing application, or for a bank account application)
- Bank account information (unless for direct deposit of paychecks requested by employer)

## Acknowledgement

The Transitions to Adulthood Center for Research would like to send a very special thanks to our Family Advisory Board and Young Adult Advisory Board! Without your work the updates to this tip sheet would not have been possible!

Visit the Transitions ACR online at [umassmed.edu/TransitionsACR](http://umassmed.edu/TransitionsACR)

Recommended citation: Northeast Massachusetts Community of Practice. (2011; Rev. 2022). My Must Have Papers. Worcester, MA: UMass Chan Medical School, Department of Psychiatry, Implementation Science and Practice Advances Research Center (iSPARC), Transitions to Adulthood Center for Research.

This publication can be made available in alternative formats upon request through [TransitionsACR@umassmed.edu](mailto:TransitionsACR@umassmed.edu)

The contents of this tip sheet were developed with funding from the US Department of Education, National Institute on Disability and Rehabilitation Research, and the Center for Mental Health Services, Substance Abuse and Mental Health Services Administration (NIDRR grant H133B090018). Additional funding provided by UMass Chan Medical School's Commonwealth Medicine division.

The 2022 revisions of this tip sheet were developed under a grant with funding from the National Institute on Disability, Independent Living, and Rehabilitation Research, (NIDILRR), United States Departments of Health and Human Services (NIDILRR grant number 90RTEM0005). NIDILRR is a Center within the Administration for Community Living (ACL), Department of Health and Human Services (HHS). The contents of this tip sheet do not necessarily represent the policy of NIDILRR, ACL, HHS, or SAMHSA and you should not assume endorsement by the Federal Government.

The Transitions to Adulthood Center for Research is part of the Implementation Science and Practice Advances Research Center (iSPARC) A Massachusetts Department of Mental Health Research Center of Excellence.



UMass Chan  
MEDICAL SCHOOL



© 2023 UMass Chan Medical School.  
All Rights Reserved.