



Get Organized for LIFE



Presented by mylifeplan.guide

No matter your son/daughter’s age, chances are, you will need to apply for services, benefits or enrollment in a program throughout many stages of life. Save yourself some time and start giving all your important documents a good home so that you’ll be able to find what you need when you need it.

- Most stores have lots of fun organizing supplies. Buy an accordion file or portable box with file hangers in a color that stands out from the crowd, something that’s easy to spot.
- Many programs have online applications. Scanning and dropping files onto a thumb drive is an easy way to keep those files handy and also have a back up to your paper copies.

Commonly Requested Documents

ID

Birth Certificate, Social Security card, picture ID and proof of Washington State residency (e.g., utility bill, voter registration).

Approvals

Many services use eligibility for another program as criteria for their own, so be sure to keep all approval letters, but especially those from SSI, DDA, Apple Health, and any housing assistance program.

Assessment(s)

Medical, psychological, and educational assessments/evaluations that identify disability and/or a disability-related need for services/treatment.

Diagnosis

Proof of disability is required when applying for disability-related benefits and services in all areas of life: education, medical, housing, employment, home & community supports, special needs trusts, and programs you might not even know exist until your son/daughter needs it.

Education

Psych eval and test results from the school psychologist, notes from school, as well as a log of any school-related incidents or behaviors. Keep copies of all IEPs, and ask your child’s school for a copy of the full school file at the end of the year (or anytime, really).

Financial

Most benefits and services have a financial eligibility component to them. If your child is under 18, keep copies of your previous year’s tax return, as well as a list of resources and assets. If your child is 18 or older, only his/her income and resources are counted; keep monthly pay stubs for reporting to SSI.

Legal

Guardianship papers, Representative Payee, Power of Attorney for Medical and/or Financial, as well as a Letter of Intent stating what your wishes are for your son/daughter.

Medical

Health insurance; test results; medication; therapies, immunizations; most recent dental/doctor visit; and contact information for all health care professionals.

Plans

Whether it’s a person-centered plan for life and/or services, planning documents are an important part of ensuring that everyone is working toward goals driven by the individual and family. In some cases, such as guardianship duties, having a documented plan of care is required.

Trust(s)

Special needs trust account information, records and accounting.