

Moving From High School to Adulthood: Record Keeping Tracker Resources

This tracker is intended as a guide to create files and record where you will keep each document. You may not need every document listed here so choose those that apply to you. Feel free to make your organizational system as fun and colorful as you like!

Here are some categories to consider including in your online or hard-copy record keeping:

PERSONAL AND LEGAL DOCUMENTS

- State ID or driver's license
- Social Security card
- Birth certificate
- Passport
- Voter registration card
- Student access card copy
- Work access card copy
- Auto insurance policy
- Home or apartment insurance policy
- Life and disability insurance policy
- Supported decision-making agreement
- Health care directive

Additional Resources

- Transition planning overview:
[PACER.org/transition/video/player.asp?video=54](https://www.pacer.org/transition/video/player.asp?video=54)
- Organizing paperwork:
[PACER.org/publications/possibilities/organizing-your-paperwork/keep-your-records-in-one-place.asp](https://www.pacer.org/publications/possibilities/organizing-your-paperwork/keep-your-records-in-one-place.asp)

HEALTH

- Health and dental insurance cards
- Online health record websites and access codes
- Health records (for the past three years) including diagnoses, medications and dosages; immunization records, allergies or sensitivities, adaptive medical equipment
- Medical Assistance (MA) and waivers documentation
- Gym or fitness membership card copies

Additional Resources

- Health privacy:
[PACER.org/health/pdfs/HIAC-h8.pdf](https://www.pacer.org/health/pdfs/HIAC-h8.pdf)
- Organizing health records:
[PACER.org/health/pdfs/hiac-h17.pdf](https://www.pacer.org/health/pdfs/hiac-h17.pdf)
- Health records:
[PACER.org/health/](https://www.pacer.org/health/)

FINANCIAL

- Bank statements
- Bank account routing numbers and account numbers
- Document copies related to trusts, ABLE account, Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI)
- **Important phone/email contacts:** Bank, financial conservator, college or educational program financial office, Social Security office

Additional Resources

- Financial management:
[PACER.org/publications/possibilities/chapter-ii-managing-your-finances.asp](https://www.pacer.org/publications/possibilities/chapter-ii-managing-your-finances.asp)
- Financial aid:
[PACER.org/transition/learning-center/postsecondary/financial-aid.asp](https://www.pacer.org/transition/learning-center/postsecondary/financial-aid.asp)

EMPLOYMENT

- Record of paid jobs and volunteer work including dates and contact information
- Resumes
- Letters of reference
- Awards, certifications, and other honors
- Vocational assessments
- List of accommodations and assistive technology that support your success at work
- Individual Plan for Employment if utilizing Vocational Rehabilitation Services

Additional Resources

- Employment supports:
[PACER.org/transition/learning-center/employment/employment-supports.asp](https://www.pacer.org/transition/learning-center/employment/employment-supports.asp)
- Employment stories:
[PACER.org/students/transition-to-life/employment-stories.asp](https://www.pacer.org/students/transition-to-life/employment-stories.asp)

EDUCATION RECORDS

- High school transcript
- High school diploma
- High school IEP and evaluation documents
- Report cards and progress reports
- ACT, SAT, or Accuplacer Scores
- Examples of academic or art/design work
- Letters of recommendation from teachers, coaches, counselors, or other adults that know you well
- Awards, certifications, and other honors
- List of effective accommodations and assistive technology

Additional Resources

- Planning for success:
[PACER.org/transition/resource-library/publications/NPC-36.pdf](https://www.pacer.org/transition/resource-library/publications/NPC-36.pdf)
- FERPA:
[PACER.org/transition/video/player.asp?video=122](https://www.pacer.org/transition/video/player.asp?video=122)

COLLEGE OR OTHER TRAINING PROGRAM

- Colleges or training programs of interest to you, including brochures, phone numbers, websites, and how to apply for disability services for each program

Additional Resources

- Training and college:
[PACER.org/students/transition-to-life/training-and-college-opps.asp](https://www.pacer.org/students/transition-to-life/training-and-college-opps.asp)
- College planning:
[PACER.org/transition/learning-center/planning/college-planning.asp](https://www.pacer.org/transition/learning-center/planning/college-planning.asp)
- College visits:
[PACER.org/parent/php/PHP-c233.pdf](https://www.pacer.org/parent/php/PHP-c233.pdf)
- Inclusive postsecondary opportunities:
[PACER.org/transition/learning-center/postsecondary/college-options.asp](https://www.pacer.org/transition/learning-center/postsecondary/college-options.asp)

HOUSING

- List of housing options of interest to you
- Housing assistance agencies (brochures, websites, contact information)
- Websites or brochures and contact information for agencies that help you apply for housing assistance

- Websites or brochures and contact information for agencies that help you apply for services and supports that may be available to you in your home
- Housing applications
- Housing-related services without eligibility requirements, such as Centers for Independent Living and Disability Hub
- Apartment or home insurance documents

Additional Resources

- Housing:
[PACER.org/housing/](https://www.pacer.org/housing/)
- Starting the journey:
[PACER.org/transition/learning-center/independent-community-living/housing.asp](https://www.pacer.org/transition/learning-center/independent-community-living/housing.asp)
- Navigating housing services:
[PACER.org/parent/php/PHP-a52.pdf](https://www.pacer.org/parent/php/PHP-a52.pdf)

TRANSPORTATION

- Metro Mobility
- Bus or light rail transit
- Uber, Lyft, or taxi services
- Friends who can provide rides

Additional Resources

- Transportation video:
[PACER.org/transition/video/topic.asp?se=Transportation](https://www.pacer.org/transition/video/topic.asp?se=Transportation)

COMMUNITY LIVING

- Recreation (fitness center, community parks and recreation programs, Special Olympics)
- Social groups
- Support groups
- Hobby or learning groups, such as community education programs
- Specific disability organization websites or social media groups

Additional Resources

- Independent living:
[PACER.org/transition/learning-center/independent-community-living/](https://www.pacer.org/transition/learning-center/independent-community-living/)

SELF-ADVOCACY RECORDS

- Personal “Snapshot”: An introduction to YOU that highlights your strengths, interests, plans for the future, needs (things that are hard for you), skills you’d like to learn, and ways others

- can support you that work best for you
- List of supports, accommodations, and modifications that empower you to succeed in school, at work, and at home
- List of assistive technology supports that are helpful to you
- Summary of Performance (SOP) from your IEP case manager (helpful for communicating strengths and needs to college/training programs, service providers, employment services, and independent living services)

Additional Resources

- Self-advocacy:
[PACER.org/students/transition-to-life/advocating-for-myself.asp](https://pacer.org/students/transition-to-life/advocating-for-myself.asp)
- Self-determination:
[PACER.org/transition/learning-center/independent-community-living/self-determination.asp](https://pacer.org/transition/learning-center/independent-community-living/self-determination.asp)
- Advocacy and self-care skills:
[PACER.org/transition/learning-center/health/building-self-advocacy.asp](https://pacer.org/transition/learning-center/health/building-self-advocacy.asp)
- Sample self-advocacy plan:
[PACER.org/parent/php/PHP-c149b.pdf](https://pacer.org/parent/php/PHP-c149b.pdf)
- Snapshot:
[PACER.org/parent/php/PHP-a56.pdf](https://pacer.org/parent/php/PHP-a56.pdf)

DISABILITY SERVICES AND BENEFITS

- Disability Hub MN
- Disability-specific advocacy organizations
- Centers for Independent Living

Additional Resources

- Disability services list:
[PACER.org/parent/php/PHP-c36.pdf](https://pacer.org/parent/php/PHP-c36.pdf)
- FAQ:
[PACER.org/webinars/knowingyouroptions/FAQ-DisabilityServicesoncampus.pdf](https://pacer.org/webinars/knowingyouroptions/FAQ-DisabilityServicesoncampus.pdf)

IMPORTANT CONTACT INFORMATION

It's a good idea to keep both online and paper copies of contact information for people and services you use often or may need in an emergency. These may include:

- **Personal support:** Parent, legal guardian, supportive decision-maker
- **Health:** Doctors, dentists, pharmacy, therapists, hospital emergency room, mental health crisis line
- **Financial:** Bank, financial conservator

- **Work:** Boss, job coach, vocational rehabilitation counselor, co-workers
- **College or training program:** Academic advisor, tutoring center, health services, disability services counselor, resident assistant, financial aid office, campus transportation, campus security
- **Housing:** Landlord or house manager, roommates, neighbor, local Center for Independent Living
- **Transportation:** Metro Mobility, bus or light rail transit, Uber, Lyft, or taxi services, friends that can help with rides
- **Disability services:** County case manager, Disability Hub, disability support groups

ACCOMPLISHMENTS

- List of goals you've achieved
- Awards and certificates of accomplishments
- Letters of reference
- Positive job reviews
- School assignments with good grades
- Notes of encouragement from those who care about you