**Supported Employment Client Folder Organization**

**Section 1: Billing**

* Purchase Authorizations
* Invoices
* Status Sheets

**Section 2: Client Information**

* Face Sheet
* LRS Application Copy of SSA Award Letter
* Client Photo
* Copy of IDs
* Intake Forms
* Agency Flyer & Business Card
* Intake Form
	+ Employment History Form
	+ Legal Status
	+ Privacy Practice
	+ Confidential Agreement
	+ Waiver of Confidentiality
	+ Hold Harmless Agreement
	+ Media Consent & Revocation
	+ Grievance & Signature Page
	+ Rights of Individual
	+ I-9 – employment Eligibility Verification
	+ W-4 Employee’s Withholding Allowance Certification
	+ 8850 – Work Opportunity Tax Credit Certification Request
	+ 9061 WOTC Individual Characteristics Form

**Section 3: Correspondence**

* Copy of Letters to Client
* LRS Application Form / Packet
* Individualized Plan Employment (IPE)

**Section 4: LRS Forms Submitted**

* Community Based Assessment
* LRS Milestone Forms
* Pay Stubs
* Invoices
* LRS Purchase Authorization

**Section 5: Other / Miscellaneous**

* Social Security
* Benefits Planning
* Pass Plan
* IRWE
* BWE
* Job Application Cheat Sheet
* Job Applications /Responses
* Reference Letters
* Transcripts
* Resume
* Cover Letter

**Section 6: Case Notes**