



COMMUNITY CONNECT RI

Benefits and Documents Organizer

A practical workbook for organizing records, applications, renewals, notices, and next steps.

Use this organizer safely

Do not write full Social Security numbers, bank account numbers, passwords, PINs, immigration numbers, or complete benefit ID numbers in this workbook. Use the last four digits only when needed.

PLAN YOUR WORK. WORK YOUR PLAN.

Prepared September 2026

Use this organizer in four steps

The goal is not to collect every paper at once. Start with the document or deadline that affects your next application, appointment, or renewal.

1

Take inventory

Mark what you have, what is missing, and what may be expired.

2

Build one safe system

Use a folder, envelope, or secure digital folder for copies and notices.

3

Track every action

Write the date, agency, method, confirmation, and next follow-up date.

4

Review each month

Check mail, portal messages, renewals, deadlines, and changes to report.

A simple four-folder system

1 Identity and household 2 Income and expenses 3 Benefits and healthcare 4 Notices and deadlines

MY FIRST PRIORITY

Next action

What do I have right now

Mark each item. Keep originals in a secure place and use copies when an agency accepts them.

Identity and legal

Photo ID or driver license

☐

Have

☐

Missing

☐

Update

Birth certificate

☐

Have

☐

Missing

☐

Update

Social Security card

☐

Have

☐

Missing

☐

Update

Passport or immigration document

☐

Have

☐

Missing

☐

Update

Court, custody, or guardianship order

☐

Have

☐

Missing

☐

Update

Household and address

Lease or housing letter

☐

Have

☐

Missing

☐

Update

Utility bill or official mail

☐

Have

☐

Missing

☐

Update

Household member information

☐

Have

☐

Missing

☐

Update

School or childcare record

☐

Have

☐

Missing

☐

Update

Income and expenses

Recent pay stubs

☐

Have

☐

Missing

☐

Update

Employer letter or schedule

☐

Have

☐

Missing

☐

Update

Benefit or pension statement

☐

Have

☐

Missing

☐

Update

Bank statement when requested

☐

Have

☐

Missing

☐

Update

Rent, utility, childcare, or medical expense proof

☐
☐
☐

Health and benefits

Insurance or benefit card

☐

Have

☐

Missing

☐

Update

Current eligibility notice

☐

Have

☐

Missing

☐

Update

Renewal notice

☐

Have

☐

Missing

☐

Update

Application confirmation or case reference

☐

Have

☐

Missing

☐

Update

Reminder: an agency may ask for documents not listed here. Always follow the current checklist or notice from that agency.

Documents I need to request or update

Before paying a fee or sending personal information, confirm the website, address, and requirements directly with the issuing agency.

Document	Agency or office	Requested	Expected	Follow-up

Questions to ask before submitting a request

- ☐ What identification or supporting records are accepted?
- ☐ What is the current fee and processing time?
- ☐ Can I apply online, by mail, or in person?
- ☐ How will I receive the record, and how can I check status?

Where to begin replacing common records

Requirements and fees can change. Use the official source below and confirm the current checklist before you apply.

Rhode Island vital records

Birth, death, marriage, and adoption records. Rhode Island lists city or town hall, online, and State Vital Records request options.

health.ri.gov/vital-records

Rhode Island state ID and REAL ID

Review the current State ID or REAL ID checklist and make a DMV reservation before visiting.

dmv.ri.gov

Replacement Social Security card

Start with the Social Security Administration. Some people may be able to request a replacement online; others may need to provide documents.

ssa.gov/number-card/replace-card

Federal tax transcript

The IRS provides online and mail options for requesting tax transcripts. A transcript is often accepted when proof of prior income or filing is requested.

irs.gov/individuals/get-transcript

My programs and current status

Use a short reference such as the last four digits of a case number. Never record full account, benefit, or Social Security numbers here.

SNAP food assistance

Status

Renewal or review date

Next action

Housing or utility assistance

Status

Renewal or review date

Next action

RI Works cash assistance

Status

Renewal or review date

Next action

Social Security or SSI

Status

Renewal or review date

Next action

Medicaid or health coverage

Status

Renewal or review date

Next action

Unemployment or disability

Status

Renewal or review date

Next action

Child Care Assistance Program

Status

Renewal or review date

Next action

Other

Status

Renewal or review date

Next action

Official places to start

Community Connect RI does not decide eligibility. The administering agency determines required documents, eligibility, benefit amount, and deadlines.

HealthyRhode customer portal

Apply for or manage health and human service benefits, upload requested documents, and review account information.

healthyrhode.ri.gov

Rhode Island Department of Human Services

Program information for SNAP, RI Works, childcare assistance, general public assistance, and other supports. DHS call center: 1-855-697-4347.

dhs.ri.gov

HealthSource RI

Rhode Island health coverage marketplace and support. Health coverage line: 1-855-840-4774.

healthsourceri.com

Stay Covered Rhode Island

Current Medicaid notices, renewal guidance, document submission information, and coverage updates.

staycovered.ri.gov

United Way Rhode Island 211

Call 211 for statewide resource navigation and help identifying community programs.

unitedwayri.org/get-help/2-1-1

Benefit rules change. Read every notice, keep your contact information current, and respond by the date printed on the notice.

Before during and after I apply

Complete only the steps that match your program. Ask the agency when you are unsure.

Before I apply

- ☐ Confirm the official application channel
- ☐ Review the current document checklist
- ☐ Gather copies and keep originals safe
- ☐ Write questions I need answered
- ☐ Choose a reliable mailing and email address

When I submit

- ☐ Review names, dates, and household details
- ☐ Sign and date every required section
- ☐ Save a copy of the completed application
- ☐ Record the submission method and date
- ☐ Save the confirmation number or receipt

After I submit

- ☐ Check mail and portal messages
- ☐ Complete interviews or appointments
- ☐ Send additional documents by the deadline
- ☐ Record each call and upload
- ☐ Read the decision notice and appeal instructions

Record what was sent and how

Keep receipts, screenshots, fax confirmations, certified-mail tracking, or portal confirmation pages with the matching application.

Date	Program or agency	Action	Method	Confirmation	Follow-up

Turn every notice into an action

Open benefit mail promptly. The deadline printed on your notice is the date that matters for your case.

When a notice arrives
1 Read the full notice 2 Circle the deadline 3 Identify what is requested 4 Save the notice 5 Act or ask for help

Received	Agency	Notice type	What is needed	Due date	Done

If I disagree or cannot meet the deadline

Read the appeal or hearing instructions in the notice. Contact the agency quickly, ask what options exist, and record the date, name, and guidance you receive. Community Connect RI does not provide legal advice.

Plan reviews before benefits are interrupted

Renewal schedules vary. Enter the month printed by the agency and set a reminder at least 30 days earlier when possible.

JAN

Program _____

Due date _____

Reminder _____

FEB

Program _____

Due date _____

Reminder _____

MAR

Program _____

Due date _____

Reminder _____

APR

Program _____

Due date _____

Reminder _____

MAY

Program _____

Due date _____

Reminder _____

JUN

Program _____

Due date _____

Reminder _____

JUL

Program _____

Due date _____

Reminder _____

AUG

Program _____

Due date _____

Reminder _____

SEP

Program _____

Due date _____

Reminder _____

OCT

Program _____

Due date _____

Reminder _____

NOV

Program _____

Due date _____

Reminder _____

DEC

Program _____

Due date _____

Reminder _____

Protect your information and keep the plan moving

A useful organizer should help you act without creating a new privacy risk.

SAFE HANDLING

- ☐ Keep original identity documents in a secure place.
- ☐ Carry copies only when needed for a specific appointment.
- ☐ Use strong passwords and multi-factor authentication for portals.
- ☐ Do not send personal documents to an unverified email or text number.
- ☐ Black out unnecessary numbers before sharing a copy when permitted.
- ☐ Shred outdated copies that contain sensitive information.

MY NEXT THREE ACTIONS

1

2

3

OFFICIAL SOURCES CHECKED SEPTEMBER 2026

[RI Department of Human Services](#)

[HealthyRhode customer portal](#)

[Stay Covered Rhode Island](#)

[RI Department of Health Vital Records](#)

[RI Division of Motor Vehicles](#)

[Social Security Administration](#)

[Internal Revenue Service](#)