

**WHEN PHONING TO SET INTAKE INTERVIEW,
ASK CLIENTS TO BRING WITH THEM:**

- ☛ **Income verification (Social Security print out, paystubs, tax forms, bank statements that show direct deposits, etc.)**
- ☛ **Insurance information (copy of insurance card with policy number, Medicaid card, Medicare card)**
- ☛ **Social security card (if available)**
- ☛ **Photo I.D. (if available)**
- ☛ **List of current medications and pill bottles (or bring all pill bottles in a bag)**
- ☛ **Most current lab reports**
- ☛ **Date of last doctor's visit**
- ☛ **Name, address and phone numbers of all doctors they see**