

**NAME/GENDER CHANGE CLINIC:
CHECKLIST FOR MAY 12, 2015 VOLUNTEERS**

Client's Preferred Name & DOB: _____

Volunteer Names: _____

1

Save Electronic Files...

- ☐ Save **all** work product electronically! Create a folder for your client titled with their preferred name [LAST NAME, FIRST NAME] within the folder "01_SAVE ALL Work Product here" located in the "Name and Gender Change Clinic" folder
- ☐ Name each document in your client's folder as follows:
→ **2015-May 12_[ClientPreferredLastName]_[Doc name].doc** ←
*Make sure your completed attorney case notes are saved there too!

2

Create a Paper File....

- ☐ Create a legal-size manila file
 - Label the file **IN LARGE/CLEAR PRINT LETTERS** with the client's **preferred** name on the tab: "LAST NAME, FIRST NAME"
- ☐ Make copies of all documents created and put them into the manila client file
 - Add **post-it notes** to documents requiring a provider signature in the manila client file
 - SHRED any materials containing client information which you do not need (Shred Box is located in the main hallway just inside the Mail Room door)
 - Confirm file contains: ☐ **Signed Medical Release** ☐ **Copy of client's ID**
☐ **Copy of Client Take Away form**, and ☐ **Affidavit of income** (Maryland only)

3

The client leaves with...

- ☐ The 1-page **Take Away Form** listing next steps
- ☐ The **Name and Gender Change Guide** for their state
- ☐ Any **letter/form** for their non-WWH doctor/therapist to sign
- ☐ The original **name change petition** signed and ready to file at the courthouse (and the completed and signed Fee Waiver, if applicable)
- ☐ Information about **how to contact TransLAW** for financial aid

4

Summary of Work...

The client and attorney drafted:

- ☐ Name Change Application for _____ county/state
- ☐ Fee waiver application
- ☐ Social Security Administration gender change letter
- ☐ DMV gender designation form (DC/VA) or letters for MD MVA gender designation
- ☐ Passport gender change letter
- ☐ Other _____

MENTOR APPROVAL: _____ **[to be signed before Client leaves volunteers]**