

New Client Checklist

Joinder scanned _____

Sub-folder created _____

Enrollment Docs uploaded _____

Add to Fundly _____

Add to True Link _____

Add to Client List _____

Medi-Cal/SS Notification _____

Other _____

New Client Checklist

Joinder scanned _____

Sub-folder created _____

Enrollment Docs uploaded _____

Add to Fundly _____

Add to True Link _____

Add to Client List _____

Medi-Cal/SS Notification _____

Other _____

New Client Checklist

Joinder scanned _____

Sub-folder created _____

Enrollment Docs uploaded _____

Add to Fundly _____

Add to True Link _____

Add to Client List _____

Medi-Cal/SS Notification _____

Other _____

New Client Checklist

Joinder scanned _____

Sub-folder created _____

Enrollment Docs uploaded _____

Add to Fundly _____

Add to True Link _____

Add to Client List _____

Medi-Cal/SS Notification _____

Other _____