

Transition Planning Process Checklist

ABLE (Achieving a Better Life Experience) Accounts:

- The Stephen Beck Jr. Achieving a Better Life Experience (ABLE) Act (Public Law 113-295) was signed into law on December 19, 2014. The ABLE Act amends the Internal Revenue Service Code of 1986 to create tax-free savings accounts for individuals with disabilities. The funds in the ABLE account do not count toward the \$2,000 cap on assets that is required to remain eligible for critical government supports.
- An ABLE account may fund a variety of essential expenses for individuals with disabilities including medical and dental care, education, community-based supports, employment training, assistive technology, housing, and transportation. The federal ABLE Act authorizes the states to develop their own ABLE programs, and many states have moved quickly to pass ABLE laws and are in various stages of developing their ABLE programs.
- <https://www.ndss.org/advocate/national-advocacy-public-policy/achieving-a-better-life-act-experienceable-act/>

Age 13/Going on 14 – Postsecondary Transition Plan is written. This will likely be the first time transition planning will be discussed.

- The student **MUST** be invited to the Individualized Education Program (IEP) team meeting.
- A Postsecondary Transition Plan (PTP) will be created for the student based on strengths, interests, preferences, and needs. This is a long-term plan for what the student will do after high school. It includes Measurable Postsecondary Goals (MPGs), Transition Services, Course of Study, and Involvement of outside Agencies.
- PTP Demo Site: <https://apps4.dpi.wi.gov/PTPDemo/Pages/DistrictMenu.aspx>
- Prepare for the IEP meeting by visiting the Wisconsin Transition App and completing the questionnaire. <http://www.witransition.com/>. Send your report to your IEP case manager.

Age 14 to Graduation – Review and Revise the PTP annually.

- Meet each year to review and revise the PTP.
- Prepare for the IEP meeting by visiting the Wisconsin Transition App and completing the questionnaire. <http://www.witransition.com/>. Send your report to your IEP case manager.
- Has the student's interests or preferences changed? Review and revise the MPGs, Transition Services, Course of Study, and Involvement of outside Agencies.
- Make sure the activities and services built into the PTP will help the student make progress toward the MPGs.
- Make sure the courses and experiences listed in the Course of Study will help the student reach their high school graduation requirements and progress toward the MPGs.

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_____ **Age 16 or at least two years prior to graduation – Division of Vocational Rehabilitation (DVR) is invited to the IEP meeting to discuss employment.**

- Student (and their family) should complete an application to DVR and have eligibility determination done. Online Referral/Application: https://dwd.wisconsin.gov/dvr/referral_request.htm
- If the student is determined to be eligible for DVR services, write an Individualized Plan for Employment (IPE). Make sure that the employment goal matches or is very similar to the employment goal in the student's IEP.
- Division of Vocational Rehabilitation: <https://dwd.wisconsin.gov/dvr/jobseek.htm>

_____ **Age 16 – 17 (at least one year prior to leaving school) – Investigate postsecondary education options: Colleges, Universities, Technical Schools, and Training Programs.**

- Learn what their admission requirements are, costs, disability services, living arrangements, etc.
- What entrance exams need to be taken?
- When does one apply?
- Are there special characteristics about the school that make it attractive or better for students with disabilities?

_____ **Age 17 years & 6 months – Contact the Aging & Disability Resource Center (ADRC).**

- Find out what services are available through Long Term Supports.
- Complete application for Long Term Supports and proceed with the eligibility process.
- If eligible, write an Individualized Support Plan (ISP). Make sure your ISP goals match your employment and independent living goals in your PTP.
- Wisconsin ADRC Website: <https://www.dhs.wisconsin.gov/adrc/index.htm>
 - Milwaukee County: <https://county.milwaukee.gov/EN/DHHS/DSD>
 - Waukesha County: <https://www.waukeshacounty.gov/adrc/>
 - Ozaukee County: <http://www.co.ozaukee.wi.us/244/Aging-Disability-Resource-Center-ADRC>
 - Washington County: <http://www.co.washington.wi.us/departments.iml?mdl=departments.mdl&D=AGE>
 - Racine County: <https://www.adrc.racinecounty.com/>
 - Kenosha County: <http://www.kenoshacounty.org/155/Aging-Disability-Resource-Center>

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Age 17 years & 6 months – Consider need for Guardianship or Power of Attorney Options.

- If Supported Decision-Making is appropriate, begin the process of making it happen.
 - Board for People with Developmental Disabilities (BPDD) - https://wi-bpdd.org/wp-content/uploads/2018/06/Supported_decision_making_booklet_final.pdf
- If Guardianship (full or limited) is appropriate, begin paperwork with county.
 - Secure a lawyer to handle it, if you prefer.
 - Milwaukee Area – refer to resource guide: <https://www.asew.org/resource-guide/>
 - Marquette University Law Clinic - <https://law.marquette.edu/mvlc/services-hours-locations>
 - Wisconsin Guardianship Support Center – <https://gwaar.org/guardianship-resources>
 - Basics of Guardianship: <http://gwaar.org/images/stories/GSC/BasicsofGship12262014.pdf>

Age 17 – 18 – Transition to adult healthcare providers

- Talk to other families and get recommendations
- Talk to your pediatrician or family doctor about recommendations
- Children’s Hospital of Wisconsin Website: <http://www.chw.org/medical-care/transition-to-adult-care/>

Age 18 years (month after birthday) – Apply for Supplemental Security Income (SSI).

- Based on a desire to work, disability, and assets less than \$2000.
- Will the individual handle their own SSI payment or do they need a Representative Payee? Who will the Representative Payee be? Set up a bank account if one is not currently available.
- Begin to gather all health care information, educational information to include names, address, phone numbers, etc. before filling out the application.
- Contact your local SSA office and make an appointment OR complete the SSI application online.
- SSA Website: <https://www.ssa.gov/benefits/disability/>

After age 18 – Estate Planning and Will – make sure everything is in order.

- Special needs trust set up to protect individual with a disability
- Who will be the “go to person” for your loved one?