



A training activity of the Massachusetts Consortium for Children with Special Health Care Needs to support successful transition to adulthood

APPENDIX B: Transition Checklist¹

Checklist instructions: The timeline provided here can be modified as developmentally appropriate for your family member/adolescent client. Use your judgment as to which items apply. Assessment and planning in the following areas can be used to anticipate needs, build on strengths, and link youth to appropriate supports and services. For Care Coordinators and Case Managers: ***This timeline will be most helpful when attached to the outside of a client's chart and referred to frequently.***

Note: The emphasis in this checklist and timeline is on preparation for adulthood. While some of these areas may be addressed within the secondary education setting, care coordinators/case managers can be most helpful in focusing on the adult years.

	Ages 11-13	Ages 14-16	Ages 17-19	Ages 20-22
I. ACTIVITIES OF DAILY LIVING (ADL)				
Assess the youth's skills and needs in the following areas: <ul style="list-style-type: none"> • Self-care (personal, hygiene, dressing) • Housekeeping (meal planning, shopping and cooking; maintaining and cleaning living space; cleaning and maintaining clothing; dealing with emergencies) • Consider need for personal care/home care provider • Assess youth's interest and skills in self-advocacy • Discuss importance and role of self-determination 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify new skills that can be learned and develop training plan		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Research resources/supports available for youth to develop these skills and increase independence in ADLs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate mobility needs <ul style="list-style-type: none"> • Ability of youth to be independent in walking within and between all buildings used for daily activities • Consider youth's employment, education and recreation plans in context of mobility skills 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify needed and reasonable equipment/adaptations		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develop plan for acquiring equipment/adaptations identified above		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review youth's travel/transportation needs and skills: <ul style="list-style-type: none"> • Need for and ability to access transportation, special transportation services, or other transportation option in the community • Ability to access and complete driver's education, identify adaptive driving programs, equipment, and vendors 			<input type="checkbox"/>	<input type="checkbox"/>
Develop plan for acquiring skills, resources, equipment identified above		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss and support youth's interests and skill development and link with relevant programs and services		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess youth's interest and skills in self-advocacy relating to planning and receiving training relating to their ADL skills		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination in making decisions about their ADL skills and training		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ This list is based on three excellent resources: 1) Blomquist, KB, Brown, G, Peerson, A, & Presler, EP. (1998) Transitioning to Independence: Challenges for Young People with Disabilities and Their Caregivers. Orthopaedic Nursing, 17(3), 27-35; 2) Provider Transition Checklist and Timeline, in Transition Planning for Adolescents with Special Health Care Needs and Disabilities: A Guide for Health Care Providers (2000), Institute for Community Inclusion at Children's Hospital, Boston., pp 17-19; 3) Directions: Resources for Your Child's Care (2004), MA Department of Public Health.

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II. SECONDARY EDUCATION				
Ask the youth and family how you can participate in the Individualized Education Program planning process	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Determine how youth and family would like you involved in achieving IEP goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss areas to include in IEP: <ul style="list-style-type: none"> • Health-related topics • ADL training • Services such as OT, PT, counseling • Vocational goals 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consider/discuss implications of passing MCAS on student's future planning and continuing services in secondary school	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure the youth and family know that federal law requires that transition planning must be included in the IEP in effect when the student turns 16. This means planning usually must begin by age 15, focusing on the student's course of study as it relates to the youth's long-term plans <ul style="list-style-type: none"> • Connect with school staff to ensure that transition planning is being done • Assist youth and family in developing and revising the Vision Statement • Explore vocational program vs. traditional education options 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise youth and family that starting at age 16, needed transition services must be included in the student's IEP. They should focus on the goals, objectives, activities and services related to transition. <ul style="list-style-type: none"> • Connect with school staff to reinforce need for statement of needed transition services. • Reinforce need to include health-care topics in service needs, as appropriate • Ensure that life skills development is addressed in IEP's service plan • Discuss including Occupational Therapist input/guidance in process 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise families that at age 18, a student has the right to make all decisions in relation to special education programs unless the family has petitioned the court for guardianship or the student has chosen to share or delegate decision-making to a parent <ul style="list-style-type: none"> • Assist in arranging any needed evaluation 			<input type="checkbox"/>	<input type="checkbox"/>
Ensure that the adolescent and family understand that the entitlement to special education services ends when the youth graduates, withdraws from high school or reaches age 22 <ul style="list-style-type: none"> • Ensure youth and family understand that passing MCAS can be a sufficient requirement for "graduating" 			<input type="checkbox"/>	<input type="checkbox"/>
Remind the youth and family that 2 years before leaving school, Chapter 688 referrals for those on IEPs must be made to adult service agencies <ul style="list-style-type: none"> • Assist family with these connections through the secondary school 			<input type="checkbox"/>	<input type="checkbox"/>
Assess youth's interest and skills in self-advocacy regarding his/her education goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination regarding his/her education and IEP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
III. AFTER HIGH SCHOOL: POST-SECONDARY EDUCATION/EMPLOYMENT				
Initiate discussion of employment visions and goals <ul style="list-style-type: none"> • Explore options for assessing skills and interests 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss work ethics, professional behaviors, employer expectations <ul style="list-style-type: none"> • Help youth and family identify the steps needed to address these issues and incorporate in student's IEP if appropriate 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Help youth and family to understand the importance of “creative” ways to acquire job-related experiences as a young person: volunteer work, internships, camp employment, other community experiences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Initiate discussion of different routes to employment such as higher education, technical training or supported employment <ul style="list-style-type: none"> Help youth and families to understand the different kinds of job supports and resources 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reinforce the importance of networking for employment and to build necessary skills (job interviewing, resume preparation) <ul style="list-style-type: none"> Help youth explore and identify ways in which they can network 			<input type="checkbox"/>	<input type="checkbox"/>
Remind the youth and family that at age 14, individualized transition planning should focus on developing a vision for employment and education <ul style="list-style-type: none"> Connect with school staff to ensure transition planning is underway Help youth and families in including employment/vocational goals and action steps in student’s IEP 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise families that at age 18, a student has the right to make all decisions in relation to special education programs, including employment planning, unless the family has chosen otherwise or has petitioned the court for guardianship			<input type="checkbox"/>	<input type="checkbox"/>
Make sure family understands that public benefits such as SSI provide incentives for employment			<input type="checkbox"/>	<input type="checkbox"/>
Discuss post-secondary options and resources, including colleges, community college, vocational programs <ul style="list-style-type: none"> Help youth to understand how post-secondary programs differ from secondary with respect to supports provided Discuss needed accommodations and how they might be accessed Direct youth to financial aid information 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss the role of the American Disabilities Act, and Section 504 in employment and post-secondary education		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess youth’s interest and skills in self-advocacy in pursuing employment and post-secondary education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination in making employment and post-secondary decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IV. HEALTH CARE AND HEALTHY LIVING				
Assess youth’s needs for a health advocate/agent/proxy to provide for and communicate about health-related needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review need to include health related topics in the IEP	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourage the youth to meet privately with his/her provider for part of the office visit		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess youth’s ability to assume increasing responsibility for his/her health care management, including: <ul style="list-style-type: none"> Understanding health care condition and medications Handling prescription needs Scheduling medical appointments and related transportation Requesting, reviewing copies of medical reports, letters, test results Playing active role in appointments with providers 		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess how dental needs are being addressed			<input type="checkbox"/>	<input type="checkbox"/>
Discuss youth’s readiness for transfer to an adult health care provider <ul style="list-style-type: none"> Encourage youth/family to discuss transferring with his/her pediatric provider(s) Assist with identification of possible providers Encourage youth to meet and interview adult providers 			<input type="checkbox"/>	<input type="checkbox"/>
Remind family that when youth becomes a legal adult at age 18, decisions about health care, finances and other adult concerns become the youth’s decision unless legal steps for guardianship/conservatorship have been taken			<input type="checkbox"/>	<input type="checkbox"/>

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Review health insurance situation: continuing coverage through family; Medicaid/Medicare; educational or employment benefits			<input type="checkbox"/>	<input type="checkbox"/>
Remind the primary medical provider to enter into such discussions with the youth about risk behaviors and abuse.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess youth's interest and skills in self-advocacy in managing their health care and in supporting their health choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination in managing their health care and creating a healthy lifestyle <ul style="list-style-type: none"> • Discuss how to avoid secondary conditions relating to lifestyle and health choices 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
V. BENEFITS, HOUSING, LEGAL & FINANCIAL CONCERNS				
Highlight and assess youth's need for assistance with managing personal finances; help with information related to financial supports and accommodations <ul style="list-style-type: none"> • Paying bills • Checking/savings accounts • Debit/credit cards 			<input type="checkbox"/>	<input type="checkbox"/>
Contact the school to ensure coordination with its life skills development program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss public benefit work incentive programs, such as Social Security and MassHealth, and how youth can utilize them		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help family identify any need, and resources, for assistance related to financial planning, document preparation (e.g., special needs trusts), estate management		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help family review needs, and resources, for legal assistance related to guardianship, conservatorship		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identify supports that will be needed to facilitate housing vision (e.g., personal care supports), adaptations, skill development training <ul style="list-style-type: none"> • Consider physical, emotional, and equipment supports 			<input type="checkbox"/>	<input type="checkbox"/>
Assess youth's interest and skills in self-advocacy in managing their finances and benefits and making housing choices			<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination in making decisions about housing and managing their personal finances			<input type="checkbox"/>	<input type="checkbox"/>
VI. RECREATION/LEISURE, SOCIALIZATION, COMPANIONSHIP				
Assess youth's current level of involvement in the community, including school activities, clubs, organizations, cultural activities, religious groups, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss in-home and community recreation options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss youth's interests in activities for fun, physical and mental fitness <ul style="list-style-type: none"> • Help identify resources • Help identify new skills or activities in which youth has interest 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help families develop strategies to foster friendships and avoid social isolation <ul style="list-style-type: none"> • Consider activities that can be done in/around home, neighborhood and school as well as in the community 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess what information about health care needs should be available to increase access to recreational activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Consider/assess youth's personal behaviors, strengths, and needs which will contribute to personal fulfillment. Help identify resources, supports as necessary: <ul style="list-style-type: none"> • Anger management • Ability to solve problems, make decisions • Self-awareness and self-confidence • Organizational skills • Self-advocacy skills • Perception of self 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consider/discuss youth's interpersonal relationships <ul style="list-style-type: none"> • Connection with positive role models • Ability to make and keep friends • Dating; sexual activity 	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Explore the role that youth's culture and religion may play in long-term planning <ul style="list-style-type: none"> • Independence • Socialization • Health 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assess youth's interest and skills in self-advocacy in building social relationships, and participating in recreational/leisure/personal activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss importance and role of self-determination in their relationships and recreation and social activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Link youth to programs and resources that will help them develop social relationships and find/participate in recreational/leisure activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>