**Action Plans for the Transition to Adulthood**

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Find action plans and resources for key areas of the transition to adulthood. All action plans are customizable based on the individual’s needs and goals. Whether you are a person with an intellectual or developmental disability (IDD), a family member, an IEP team member, or anadult service provider, we hope these action plans will help you work togetherto turn ***possibility into opportunity***.

Disclaimer: These action plans are for informational purposes only. It is not intended to be comprehensive, and should not be taken as legal advice. Services and programs mentioned may vary by county. Please consult with professionals with expertise in this topic area for guidance specific to you, your family or student/client's situation. The “approximate age” listed with each item is a general recommendation for when to get started on an action item; however, everyone has a different timeline and for many of the items, it’s never too late to take action! Have a suggested correction or addition to this checklist? Email worktogethern@med.unc.edu.

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# Employment Action Plan

Individuals with disabilities are employable. NC's Division of Employment and Independence for People with Disabilities is an important partner in the process of helping youth with career exploration, employment readiness skills, and job placement.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: IEP=Individualized Education Program. Pre ETS= Pre Employment Transition Services , EIPD= Division of Employment and Independence for People with Disabilities

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| **✅** | Developing skills for the workplace | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Learn to use time management strategies at home and in school (i.e., checklists, calendar, planner). | As early as possible & ongoing | Individual, family | [Time management supports](https://worktogethernc.com/resource/time-management-supports/)  [Time management tips](https://worktogethernc.com/resource/time-management-tips/) |
|  | Take on more chores at home. | As early as possible & ongoing | Individual, family | [The ultimate list of age appropriate chores](https://worktogethernc.com/resource/the-ultimate-list-of-age-appropriate-chores/)  [How to create an autism friendly chore chart](https://worktogethernc.com/resource/11695/) |
|  | Review work readiness skill checklists and target skills in need of further development. | As early as possible & ongoing | Individual, family, School/IEP Team | [Work ready checklist](https://worktogethernc.com/resource/workplace-essential-skills-work-ready-checklist/)  [Workplace soft skills checklist](https://worktogethernc.com/resource/workplace-soft-skills-checklist/) |
|  | Consider taking community based classes to expand hard and soft skills and explore interests (i.e., Adult Basic Ed programs at community colleges, programs at Parks & Rec or local library, toastmasters, webinars). | As early as possible & ongoing | Individual, family | [Soft skills to pay the bills](https://worktogethernc.com/resource/soft-skills-to-pay-the-bills-mastering-soft-skills-for-workplace-success/)  [Apprenticeships NC](https://worktogethernc.com/resource/apprenticeship-nc/)  [Adult basic education](https://www.careeronestop.org/FindTraining/Types/adult-basic-education.aspx) |
|  | Consider higher education options (i.e., community college, University, trade school, certificate programs). | Start at 14 and ongoing (i.e., community college, University, trade school, adult basic education programs) | Individual, family, School/IEP Team | [What’s Next: College!? Guide](https://worktogethernc.com/resource/whats-next-college-a-guided-exploration-of-nc-inclusive-postsecondary-options-for-students-with-disabilities/)  [NC postsecondary opportunities](https://worktogethernc.com/wp-content/uploads/2022-23-PSE-Opportunities.pdf)  [Postsecondary Education Action Plan](https://worktogethernc.com/action-plans/what-opportunities-are-available-after-high-school/what-opportunities-are-available-after-high-school-postsecondary-education/) |
|  | Learn about workplace rights under the Americans with Disabilities Act . Refer to the Self Advocacy action plan to further develop self advocacy skills. | Start at 14 and ongoing | Individual, School/IEP Team, EIPD | [Self Determination/Self Advocacy action](https://worktogethernc.com/action-plans/making-choices-is-hard/self-determination-self-advocacy-action-plan/)  [Learn about my rights](https://worktogethernc.com/resources-for-all/self-advocates/learn-about-my-rights/) |
| **✅** | Gaining volunteer or work experience | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Begin exploration of personal learning styles and necessary accommodations/supports to be successful in a work setting. | As early as possible & ongoing | Individual, school/IEP Team | [Job Accommodation Network](https://worktogethernc.com/resource/job-accommodation-network-jan/) |
|  | Review how course of study pathways can support the student’s employment options (i.e., certificate versus, occupational course of study and future ready diploma pathway). | 13 (Middle School) and ongoing | School Personnel/IEP Team | [NC high school graduation requirements](https://www.dpi.nc.gov/districts-schools/high-school-graduation-requirements#Future-ReadyCourseofStudy22creditsStudentsenteringGrade9in2021-2022-1951) |
|  | Identify career interests and skills, complete interest and career inventories, and identify education or training requirements for careers. | Starting in middle school and ongoing | Individual, school/IEP Team | [NC Careers](https://nccareers.org/) |
|  | Learn about different types of work and determine the best fit: self employment, customized employment, or traditional employment. | Starting in middle school and ongoing | Individual, school/IEP Team, EIPD | [What is customized employment?](https://worktogethernc.com/resource/what-is-customized-employment/)  [Solutions for youth with disabilities](https://www.youtube.com/watch?v=obHjfkO8cWQ)  [A guide to self employment for people with disabilities](https://worktogethernc.com/resource/a-guide-to-self-employment-for-people-with-disabilities/) |
|  | Explore assistive technology & communication tools that can increase employment opportunities. | Starting at age 14 & ongoing | Individual, family, school/IEP Team | [Assistive technology resources](https://worktogethernc.com/resources/?_keyword_search=assistive%20technology) |
|  | Explore apprenticeship and/or internship options. | Starting at age 14 & ongoing | Individual, school/IEP Team, EIPD | [Apprenticeship NC](https://www.apprenticeshipnc.com/)  [Project SEARCH](https://nccdd.org/project-search.html) |
|  | Consider job shadowing or informational interviewing. | Starting at age 14 & ongoing | Pre Employment Transition Service Programs | [Informational interviewing](https://worktogethernc.com/resource/informational-interviewing/)  [Do’s and don’ts of job shadowing](https://worktogethernc.com/resource/21-dos-and-donts-of-job-shadowing-plus-its-importance/) |
|  | Consider summer employment or volunteer experience. | High school | Individual and family | [VolunteerMatch](https://www.volunteermatch.org/search?l=North%20Carolina,%20USA)  [NC Careers](https://nccareers.org/) |
| **✅** | Accessing Resources | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore Pre Employment Transition Service (Pre-ETS) Programs offered locally. | Age 14-21 | Individual, family, school/IEP Team, EIPD | [Pre Employment Transition Service FAQ](https://worktogethernc.com/resource/pre-employment-transition-services-faq-2/) |
|  | Learn about social security programs such as the Ticket to Work and Benefits Counseling and policies such as Work Incentives (i.e., Student Earned Income Exclusion). | Benefits counseling services are available starting at age 14 | Individual and family, EIPD | [Work incentives](https://worktogethernc.com/resource/work-incentives/)  [Student earned income exclusion](https://www.ssa.gov/ssi/spotlights/spot-student-earned-income.htm) |
|  | Set up a meeting with a benefits counselor. | Benefits counseling services are available starting at age 14 | Individual and family, Community Agency (i.e., EIPD, Service Source) | [NC benefits counseling services](https://www.servicesource.org/north-carolina-benefits-counseling-services/)  [Benefits counseling](https://worktogethernc.com/resource/benefits-counseling-a-tool-to-promote-employment/) |
|  | Explore transportation options for getting to work. | Age 15 | Individual, School/IEP Team, and Family | [Transportation resources](https://worktogethernc.com/resources/?_keyword_search=transportation)  [Transportation action plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-transportation-action-plan/) |
|  | Seek out an evaluation for services by NC EIPD \*Note: Evaluation for EIPD adult services could risk in school EIPD services if student is deemed ineligible for "competitive integrated employment". | Age 16 | Individual and family | [Local office listing](https://www.ncdhhs.gov/divisions/eipd/local-office-listing) |
|  | Request meeting with an EIPD Counselor, including inviting them to IEP meetings. | Age 16 | Individual, school/IEP Team, EIPD | [NC EIPD](https://worktogethernc.com/service/984/) |
|  | Explore Work Together NC's employment service library and contact service agencies of interest. | Starting at age 16 & ongoing | Individual, family, school/IEP Team, EIPD | [Employment services](https://worktogethernc.com/services/?_services_type=employment-services) |
|  | Determine eligibility for SSI, and apply, if desired. Learn about asset limits (the impact of work income on benefits). See the adult services action plan for more details. | Start the application at 17.5 | Individual, school/IEP Team, EIPD or other benefits counseling agency (i.e., Service Source) | [Supplemental security income](https://www.ssa.gov/ssi?utm_medium=cpc&utm_source=bing&utm_content=ssi-disability-ad4&utm_campaign=cm-ssi-english)  [Adult services action plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |

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| **✅** | Finding a job | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Set short and long term employment goals based on student's strengths and interests. | Starting at age 14 & ongoing | Individual, School/IEP Team, EIPD | [Setting and pursuing goals](https://worktogethernc.com/resource/setting-and-pursuing-self-determined-goals/) |
|  | Participate in mock interviews and job fairs. | Starting at age 14 & ongoing | Individual, Pre Employment Transition Service Programs, School/IEP Team, EIPD | [NC Works job fair calendar](https://worktogethernc.com/resource/nc-works-job-fair-calendar/)  [Disability solutions: job seeker events](https://worktogethernc.com/resource/disability-solutions-partner-jobseeker-events/) |
|  | Begin a resume and update it as needed. | Starting at age 16 & ongoing | Individual, school/IEP Team, EIPD | [Resume resources](https://worktogethernc.com/resources/?_keyword_search=resume) |
|  | Match career interests/skills with vocational course work as well as school and community-based work experiences (called "work-based learning"). | High school | Individual, School transition facilitator/IEP Team | [Internships, apprenticeships, and other work based learning](https://nccareers.org/internships-apprenticeships-other-work-based-learning) |
|  | Apply for jobs. Check out Work Together NC's Alliance of IDD Inclusive Employers! | High school | Individual/Family, Pre Employment Transition Service Programs, EIPD | [IDD Inclusive Employment Alliance](https://worktogethernc.com/employer-training/) |

# Postsecondary Education Action Plan

Learning is lifelong and doesn’t end with high school. Postsecondary education settings include universities and colleges, as well as trade, continuing education, and vocational schools.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: IDEA=Individuals with Disabilities Education Act ADA=Americans with Disabilities Act. CTP=Comprehensive Transition Program. IEP=Individualized Education Program. FERPA=Family Educational Rights and Privacy Act, EIPD= Division of Employment and Independence for People with Disabilities, MCO= Managed Care Organization

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| **✅** | Continuing education after high school | **Approximate Age** | **Who can help?** | **Resources** |
|  | Work on study skills and organizational habits (i.e., using time management tools). | As early as possible & ongoing | Individual, Family, School/IEP Team | [Foundational skills for college success](https://thinkcollege.net/think-college-news/foundational-skills-for-college-and-career-success) |
|  | Explore options for postsecondary education, training, or continuing education. As a starting point, check out Work Together NC’s postsecondary education program library and Exploration Guide. | Start in middle school and ongoing | Individual, Family, School/IEP Team | [What’s Next: College!? Guide](https://worktogethernc.com/resource/whats-next-college-a-guided-exploration-of-nc-inclusive-postsecondary-options-for-students-with-disabilities/)  [NC Postsecondary Services](https://worktogethernc.com/services/?_services_type=post-secondary-education) |
|  | Review how high school course of study could impact the student’s postsecondary options (i.e., certificate versus diploma pathway). | 13 (Middle School) and ongoing | School/IEP Team | [NC high school graduation requirements](https://www.dpi.nc.gov/districts-schools/high-school-graduation-requirements#Future-ReadyCourseofStudy22creditsStudentsenteringGrade9in2021-2022-1951) |
|  | Become familiar with the key differences between high school and college (I.e., IDEA vs ADA, accommodations vs modifications, IEP vs person centered planning, changes in expectations). | 14 | Individual, School/IEP Team | [The transition from high school to college](https://www.vmi.edu/media/content-assets/documents/disabilities-services/Assisting-Students-Making-the-Transition-to-College.pdf) |
|  | Attend open houses, college fairs, virtual or in-person tours of postsecondary options. | Start at 14 and ongoing | Individual, Family, School/IEP Team | [NC virtual college fair](https://www.youtube.com/watch?v=ZU7CXmuT8dc&list=PLMQcjNK-aUMTgp-Xbzbf7D9tmssAs2Ou8) |
|  | Become familiar with parental rights regarding the young person’s educational records, as outlined in the Family Educational Rights and Privacy Act (FERPA). | Year before entry to Post-secondary | Family | [NC Parental Rights and Responsibilities](https://www.dpi.nc.gov/parent-rights-handbook/download) |
|  | Identify a representative from chosen postsecondary option to attend IEP meetings, if possible. | Year before entry to Post-secondary | Individual, Family, School/IEP Team |  |
| **✅** | Determining which postsecondary programs to apply to | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Refer to the employment action plan to clarify career interests and goals, which will inform postsecondary goals. | As early as possible | Individual, Family, and School/IEP Team, EIPD | [Employment action plan](https://worktogethernc.com/action-plans/what-opportunities-are-available-after-high-school/what-opportunities-are-available-after-high-school-employment/) |
|  | Compare program admissions criteria, location, cost, residential options, # years, and other factors that may influence decision making. Consider which options are most aligned with the individual’s goals. | Start at 14 and ongoing | Individual, Family, and School/IEP Team, EIPD | [NC postsecondary programs](https://www.cidd.unc.edu/docs/psea/2022-23%20PSE%20Opportunities.pdf)  [Think College search tool](https://worktogethernc.com/resource/think-college-search-tool-find-a-college-program-thats-right-for-you/)  [Self advocate guide to choosing a PSE program](https://worktogethernc.com/resource/self-advocates-guide-to-choosing-a-postsecondary-program/) |
|  | Identify the postsecondary option(s) of interest, based on career and life goals. Work with support team to ensure admissions criteria are met. | 14-16 | Individual, Family, and School/IEP Team, EIPD | [Think College search tool](https://worktogethernc.com/resource/think-college-search-tool-find-a-college-program-thats-right-for-you/) |
|  | Create a College Foundation of North Carolina account and explore the resources on this site. | 16 | Individual, Family, and School/IEP Team, EIPD | [College Foundation of NC](https://www.cfnc.org/) |
|  | Attend open houses, college fairs, virtual or in-person tours of postsecondary options--consider accessibility of the physical environment. | 1-3 years before entry to postsecondary program | Individual, Family, and School/IEP Team | [Self advocate guide to choosing a PSE program](https://worktogethernc.com/resource/self-advocates-guide-to-choosing-a-postsecondary-program/)  [Self examination: how inclusive is your campus?](https://worktogethernc.com/resource/self-examination-how-inclusive-is-your-campus/) |
|  | Research financial aid options, such as FAFSA (if program is a CTP), Vocational Rehabilitation, NC Legislative Scholarships, NC Promise, Ruby's Rainbow, and other individualized scholarship programs. | 1-2 years before entry to Postsecondary | Individual and family, School/IEP Team/School financial aid officer or guidance counselor |  |
| **✅** | Finding resources in postsecondary education | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore how adult services can be used in a postsecondary setting (i.e., vocational rehabilitation services, NC Medicaid Waiver or 1915(i) services). See Adult Services action plan for more details. | Year before entry to Post-secondary | Individual, Family, and School/IEP Team, Managed Care Organization, EIPD | [Adult services action plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |
|  | Gather more information on support services offered at programs of interest (i.e., disability services, peer support groups). Connect with the accessibility and disability support services office when visiting college campuses or vocational programs. | 16-18 | Individual, Family, School/IEP Team, Postsecondary Program | [Help your young adult learn about accessing accommodations](https://worktogethernc.com/resource/help-your-young-adult-learn-about-accessing-accommodations-after-high-school/) |
|  | Research student wellness programs at identified programs of interest (i.e., for mental health, study/organizational skills). | Year before entry to Post-secondary | Individual, Family, School/IEP Team, Postsecondary Program |  |
| **✅** | Completing applications | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | If applicable, make arrangements for accommodations to take college entrance exams. | 16-17 | School/IEP Team | [Accommodations for college entrance testing](https://worktogethernc.com/resource/accommodations-for-college-entrance-testing/) |
|  | Collect/request final copies of all necessary financial and disability documents for applications/ accommodations after high school (I.e, Most recently updated IEP, Medical documentation of disability , Power of attorney & other guardianship documentation). | During the last year before graduation | School/IEP Team | [Self advocacy action plan](https://worktogethernc.com/action-plans/making-choices-is-hard/supported-decision-making-action-plan/) |
|  | Complete applications and await admissions decisions. Consider applying to multiple programs in case the student does not get into their top choice. | Depends on admissions window (see website for program of choice) and desired year of entry | Individual, Family, School/IEP Team |  |
|  | Develop “back up” plans in case the student is not admitted to their desired PSE program or any programs. Consider ways a “gap year” could be used to further prepare for PSE. | When applying to PSE programs | Individual, Family, School/IEP Team |  |

# Housing/Community Living Action Plan

Addressing the community living and housing needs for individuals with disabilities is greater than just finding places for them to live. It's also involves developing daily living skills, setting up adult services for daily living needs, and finding "belonging" in the community.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: MCO= Managed Care organization, Pre-ETS= Pre Employment Transition Services, IDD=Intellectual and Developmental Disability

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| **✅** | Preparing for Community Living | **Approximate age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore natural support resources to help develop an individual's social network. | 13 and ongoing | Individual, Family/Guardian, and Transition Facilitator/IEP Team | [Natural support network development](https://nccdd.org/initiatives/currentinitiatives/43-initiatives/649-natural-support-network-development.html) |
|  | Utilize resource mapping tools to gain awareness of local resources. | 13 and ongoing | Individual, Family/Guardian, and Transition Facilitator/IEP Team | [Community resource mapping](https://dol.ny.gov/system/files/documents/2021/11/resource-resource-mapping-ncset.pdf)  [Community resource mapping toolkit](http://project10.info/files/CommunityResourceMapToolkit5.08.14.pdf) |
|  | Contact your local MCO to assess the child's eligibility for services. If eligible, ensure the child is added to the Registry of Unmet Needs (also known as the "waitlist") for the NC Innovations Waiver. | As early as possible– infancy is not too young. It can take 15+ years to get off the waitlist! | Individual and family | [NC DHHS: IDD](https://www.ncdhhs.gov/divisions/mental-health-developmental-disabilities-and-substance-use-services/intellectual-and-developmental-disabilities)  [LME/MCO Directory](https://www.ncdhhs.gov/providers/lme-mco-directory)  [NC Innovations Waiver](https://medicaid.ncdhhs.gov/providers/programs-and-services/behavioral-health-idd/nc-innovations-waiver) |
|  | Contact your local MCO to ask about eligibility for home and community services. Even if an individual is still on the Registry of Unmet Needs, they may qualify for other services. [see Adult Services action plan for information]. | Contact MCO at least once a year, starting at 14 (there are oftentimes updates in policies/services available) | Individual and family | [Accessing IDD services](https://www.ncdhhs.gov/20230816accessing-idd-resourcescolor/download?attachment)  [Adult services action plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |
|  | Learn about housing rights for people with disabilities. | 14 | Individual, Family/Guardian, and School/IEP Team | [Your housing rights](https://worktogethernc.com/resource/your-housing-rights/)  [Fair housing equal opportunity information](https://worktogethernc.com/resource/fair-housing-equal-opportunity-information/) |
|  | Contact your MCO or other IDD services provider organizations to help identify housing programs of interest and navigate to applications. | Middle school or as early as possible | Individual, Family/Guardian | [Work Together NC service search](https://worktogethernc.com/resources/?_resource_tags_2=community-living-housing) |
|  | Explore other Work Together NC action plans that are relevant to community living: transportation, adult services, financial well-being, self determination, and more! | As early as possible and ongoing | Individual, Family/Guardian, and Transition Facilitator/IEP Team, Adult Service Providers | [Work Together NC action plans](https://worktogethernc.com/action-plans/) |
| **✅** | Developing daily living skills | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Review life skills checklists and resources throughout the transition process. | As early as possible & ongoing | Individual, School/IEP Team | [Life skills checklist](https://peatc.org/wp-content/uploads/2021/07/Independent-Living-Life-Skills-Checklist-Booklet-ENGLISH-Interactive.pdf) [(en español)](https://peatc.org/wp-content/uploads/2021/07/Independent-Living-Life-Skills-Checklist-Booklet-Spanish.pdf)  [Lista de Verificacion de Habilidades para la Vida](https://peatc.org/wp-content/uploads/2021/07/Independent-Living-Life-Skills-Checklist-Booklet-Spanish.pdf) |
|  | Learn daily living skills (budgeting, shopping, cooking) from classroom and community-based instruction or life experiences. | As early as possible & ongoing | Individual and School/IEP Team, Pre-ETS programs | [Life skills checklists](https://media.focusonthefamily.com/fotf/pdf/magazine/checklist-4-lifeskills.pdf)  [Pre employment transition services](https://worktogethernc.com/resource/pre-employment-transition-services-faq-3/) |
|  | Increase responsibilities at home (i.e., chores, using a schedule or planner) and explore support needs (i.e., assistive technology, visual checklists). | As early as possible & ongoing | Individual and Family | [Using technology to increase independence](https://worktogethernc.com/resource/using-technology-to-increase-independence/) |
|  | Identify preferred leisure activities for home and the community. If necessary, develop a choice board or other structure needed for leisure time. | As early as possible & ongoing | Individual and family | Parks and recreation, churches, YMCA, community billboards & kiosks |
|  | Learn and practice coping skills. | As early as possible & ongoing | Individual, Family, School/IEP Team, Therapist | [Coping and calming skills](https://afirm.fpg.unc.edu/prioritize-coping-and-calming-skills) |
| **✅** | Achieving safety and social belonging in the community | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Learn and practice communication and self-advocacy skills for different settings (employment, school, recreation). | As early as possible & ongoing | Individual, Family, School/IEP Team | [Advocacy toolkit](https://worktogethernc.com/resource/advocacy-toolkit/)  [Building self advocacy and self care skills](https://www.pacer.org/transition/learning-center/health/building-self-advocacy.asp)  [Self advocacy action plan](https://worktogethernc.com/action-plans/making-choices-is-hard/self-determination-self-advocacy-action-plan/) |
|  | Learn and practice community safety skills. | As early as possible & ongoing | Individual and family, School/IEP Team | [Safetypowers program](https://learn.kidpower.org/course/safety-powers-project)  [Safety in the community](https://www.autismspeaks.org/safety-community)  [Bridging to adulthood tips](https://hollandbloorview.ca/sites/default/files/Transitions%20Tipsheets/Bridging%20to%20Adulthood%20Tips%20-%20Safety%20Resources.pdf) |
|  | Become familiar with safety strategies for social media i.e., how to recognize scams, avoid predators, protect personal information. | As early as possible & ongoing | Individual and family, School/IEP Team | [How to stay safe online](https://www.anncrafttrust.org/how-to-stay-safe-online-guidance-for-adults-and-young-people-with-learning-disabilities/) |
|  | Broaden experiences and skills through community activities. Check out Work Together’s social/recreational program library. | As early as possible & ongoing | Individual and family | [Work Together NC service search](https://worktogethernc.com/services/?_services_type=social-recreation) |
|  | If applicable, prepare for living with roommates (i.e., practice relevant social skills like setting boundaries, communicating preferences). | High School | Individual and family | [Guide to living with a roommate](https://roomiapp.com/blog/us/co-living/living-with-a-roommate/#2-helping-hand-in-home-maintenance-)  [Common guides to living with a roommate](https://www.vistaresidences.com.ph/blog/roommate-relationship-common-guides-to-living-with-roommates) |
|  | Learn how to understand and respond to emergencies in the home and community. | High School | Individual and family, School/IEP Team | [Types of emergencies](https://www.redcross.org/get-help/how-to-prepare-for-emergencies/types-of-emergencies.html) |
| **✅** | Exploring options for housing | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Identify the types of future living arrangements that fit your preferences and support needs. Tip: many adults with ID and family members can find useful information from resources about housing types for Autistic people. | Start in middle school and ongoing | Individual, Family/Guardian, School/IEP Team, Managed Care Organization | [Finding the right housing toolkit](https://worktogethernc.com/resource/finding-the-right-housing-toolkit-autism-grown-up-2/)  [Housing checklist](https://worktogethernc.com/resource/its-my-choice-housing-checklist/)  [Deciding where to live: getting started](https://worktogethernc.com/resource/deciding-where-to-live-getting-started-the-arc/) |
|  | Explore Work Together NC’s online libraries where you can find information to use with your family and trusted adults to learn more about the types of living arrangements that might be right for you. Tip: some of these resources focus on autism, but they have useful information for adults with ID. | Start in middle school and ongoing | Individual, Family/Guardian, School/IEP Team, Managed Care Organization | [Work Together NC resource library](https://worktogethernc.com/resources/?_resource_tags_2=community-living-housing&_paged=2)  [A place in the world report](https://worktogethernc.com/resource/a-place-in-the-world-report-ahn/)  [Supporting people with IDD to identify appropriate housing](https://worktogethernc.com/resource/supporting-people-with-i-dd-to-identify-appropriate-housing/) |
|  | Learn about the NC Medicaid Supported Living Definitions and understand what they mean for your family. If the individual is receiving the NC Innovations Waiver, talk to your MCO Care Coordinator. If the individual is not receiving the NC Innovations Waiver, ask a Care Coordinator from your MCO about supported living services that may be available through the State of NC. | Individuals are re-assessed for their "level" every 3 years by the MCO | Individual, Family/Guardian, Managed Care Organization | [Supported living services](https://worktogethernc.com/resource/supported-living-services-nc-medicaid-innovations-waiver/)  [Supported living guidebook](https://worktogethernc.com/resource/nccdd-supported-living-guidebook/)  [LME/MCO Directory](https://www.ncdhhs.gov/providers/lme-mco-directory) |
|  | Contact housing services providers to understand the availability of residential housing options and your eligibility. Use the WorkTogetherNC.com Find Services page to search by county, region, and for agencies that serve people in all areas of the state. | High school | Individual, Family/Guardian, Managed Care Organization | [Housing services search](https://worktogethernc.com/services/?_services_type=housing)  [Residential options toolkit](https://worktogethernc.com/resource/autism-society-nc-residential-options-toolkit/)  [Housing choices](https://worktogethernc.com/resource/housing-choices-the-arc-of-nc/) |
|  | If you are interested in living in an apartment or another type of rented space, research affordable housing programs that assist people to pay for rent. | High school | Individual, Family/Guardian, Managed Care Organization | [NC affordable housing authorities](https://worktogethernc.com/resource/nc-affordable-housing-local-housing-authorities-website/)  [Housing choice voucher](https://worktogethernc.com/resource/housing-choice-voucher-fact-sheet/) |

# Healthcare Action Plan

Youth with disabilities are encouraged to take an active role in their healthcare, as early as possible. It is important to understand how to navigate Medicaid or other insurance options, how to find doctors and specialists that meet your needs, and how to access assessments/evaluations when needed.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym key: MCO=Managed Care Organization

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| **✅** | Physical Health | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Consider applying for Medicaid. See the adult services action plan for more information on how to navigate Medicaid’s IDD services. | As early as possible | Individual and Family/Guardian | [Medicaid.gov](http://medicaid.gov)  [Adult services action plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |
|  | Explore Work Together NC's library of healthcare services. | As early as possible & ongoing | Individual and Family/Guardian | [Healthcare services](https://worktogethernc.com/services/?_services_type=healthcare-mental-health) |
|  | Consider acquiring a medical information ID card for emergencies. | As early as possible | Individual and Family/Guardian, Doctor | [Medical identification for emergencies](https://worktogethernc.com/resource/medical-identification-for-emergencies/) |
|  | Ask doctor if and at what age they no longer care for young adults. | 12-13 | Individual and Family/Guardian | [Getting ready for the age of majority](https://www.parentcenterhub.org/aom-series-healthcare/)  [A healthcare guide for youth and families](https://worktogethernc.com/resource/transition-to-adulthood-a-health-care-guide-for-youth-and-families/) |
|  | Identify adult health care providers and become informed about sexuality and family planning options. | 13 | Individual, family/guardian, and MCO | [Finding adult healthcare](https://worktogethernc.com/resource/finding-adult-health-care/)  [Find a family planning clinic](https://worktogethernc.com/resource/find-a-family-planning-clinic/) |
|  | Learn what your teen knows about their health, health care, and family medical history. The individual and parent/caregiver can take Got Transition’s Transition Readiness Assessments\* and discuss this together and with a doctor. | 14-15 | Individual, Family/Guardian, Doctor | [A family toolkit: pediatric to adult healthcare transition](https://worktogethernc.com/resource/a-family-toolkit-pediatric-to-adult-health-care-transition/) |
|  | Learn what your teen knows about potential healthcare accommodations for them, assist them in creating a personalized accommodations report. | 14-15 | Individual, Family/Guardian, Doctor | [Autism healthcare accommodations tool](https://worktogethernc.com/resource/autism-healthcare-accommodations-tool/) |
|  | Provide the individual with their own health insurance card. | 14-15 | Individual and Family/Guardian |  |
|  | Prepare the individual for what to do in case of a health emergency. | 14-15 | Individual and Family/Guardian | [What to do in a medical emergency](https://worktogethernc.com/resource/what-to-do-in-a-medical-emergency-transition-skills-tops-and-tools/) |
|  | Practice making a doctor’s appointment and ordering prescription refills (either by phone, online, or through an app). | 14-15 and ongoing | Individual and Family/Guardian | [How can I teach telephone skills at home?](https://asatonline.org/research-treatment/clinical-corner/telephone-skills/) |
|  | Work with your teen and the doctor to make and share a medical summary. | 16-17 | Individual and Family/Guardian, Doctor | [Creating a medical health summary](https://worktogethernc.com/resource/creating-a-medical-health-summary/) |
|  | Before your teen turns 18 and becomes a legal adult, figure out if they will need help making health care decisions. See the "Supported Decision Making & Guardianship" section for more information. \*Unless other arrangements have been made (ie., healthcare power of attorney), at age 18, the individual is a legal adult and legally responsible for their care. You cannot access their medical information or be in the doctor’s visit unless your young adult agrees or certain legal forms have been completed. | 16-17 | Individual and Family/Guardian, Doctor | [Supported decision making action plan](https://worktogethernc.com/action-plans/making-choices-is-hard/supported-decision-making-action-plan/) |
|  | Talk with your teen about the age they want to transfer to a new doctor for adult care. | 16-17 | Individual and Family/Guardian | [Got Transition](https://www.gottransition.org/) |
|  | Review health insurance coverage: inform insurance company of child's disability and investigate rider of continued eligibility. | 17 | Individual and Family/Guardian | [How do child riders on life insurance work?](https://www.policygenius.com/life-insurance/how-do-child-riders-on-life-insurance-work/) |
|  | If appropriate, assume additional responsibility for health care needs (making appointments, etc). | 18 | Individual | [5 important daily living skills](https://www.integrityinc.org/5-important-daily-living-skills-to-have-adults-with-disabilities/)  [Basic life skills for adults with disabilities](https://udservices.org/basic-life-skills-adults-disabilities/) |
|  | Request/advocate for an updated educational psych eval from the school, which may be useful when entering adult services or postsecondary programs. | Within last 2 years of leaving high school | Individual and Family/Guardian, School/IEP Team | [Advocacy assistance](https://www.ecac-parentcenter.org/) |
|  | Mental/Behavioral Health | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore Work Together NC's library of mental health services. | As early as possible & ongoing | Individual and family | [Healthcare action plan](https://worktogethernc.com/services/?_services_type=healthcare-mental-health) |
|  | Explore options for peer support and other community-based resources. | As early as possible & ongoing | Individual, school, adult service providers | [Nami](http://nami.org/) |
|  | If appropriate, assume additional responsibility for mental health care needs (making appointments, etc). | 16 | Individual with help of others | [5 important daily living skills](https://www.integrityinc.org/5-important-daily-living-skills-to-have-adults-with-disabilities/)  [Basic life skills for adults with disabilities](https://udservices.org/basic-life-skills-adults-disabilities/) |
|  | Complete a needs assessment with your managed care organization. | 17 | Individual, family, and MCO | [NC Snap](https://www.ncdhhs.gov/providers/provider-information/mental-health-development-disabilities-and-substance-abuse-services/nc-snap-nc-support-needs-assessment-profile#:~:text=The%20NC%2DSNAP%20is%20a,of%20need%20for%20DD%20services.)  [LME/MCO Directory](https://www.ncdhhs.gov/providers/lme-mco-directory) |
|  | Review insurance coverage for mental health services: inform insurance company of child's disability and investigate rider of continued eligibility. | 17 | Individual and family | [How do child riders on life insurance work?](https://www.policygenius.com/life-insurance/how-do-child-riders-on-life-insurance-work/) |

# Adult Services Action Plan (Navigating SSI/Medicaid)

Service systems become more complicated as youth enter adulthood. It is important to learn how to use these systems so that the exit from high school doesn't feel like a "drop off" in support!

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: MCO= Managed Care Organization. DMV= Department of Local vehicles. CAP=Community Alternatives Program. SSI=Supplemental Security Income. SSDI= Social Security Disability Insurance. IDD=Intellectual and Developmental Disabilities. TBI=Traumatic Brain Injury

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| **✅** | Getting documents in order | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Acquire a state identification card at the DMV. | 16 | Individual and/or guardian | [NC DMV](https://www.ncdot.gov/dmv/license-id/identification/Pages/default.aspx) |
|  | Start a folder of your child's important documents (Social Security Card, Birth Certificate, Diagnosis paperwork). | 16 | Family/Guardian |  |
|  | Register to vote and register for selective service (if male). | 18 | Individual and/or guardian | [How to register to vote](https://disabilityrightsnc.org/resources/how-to-register-to-vote/)  [Selective service](https://www.sss.gov/register/) |
|  | Obtain an updated psychological evaluation and adaptive behavior assessment. Documentation of IDD or TBI is required to access adult IDD services. | Within 2 years of applying to access adult services | Family/Guardian, Licensed Clinical Psychologist |  |
| **✅** | Navigating NC Medicaid | **Approximate Age** | **Who can help?** |  |
|  | Establish residency in NC. | N/A | Individual and guardian/family | [What information do I need to apply for Medicaid](https://www.nhcgov.com/Faq.aspx?QID=788) |
|  | Apply for Medicaid. Consider submitting an appeal if denied. | As early as possible | Individual and guardian/family, NC Department of Health and Human Services | [NC Medicaid](https://ncgov.servicenowservices.com/sp_beneficiary?id=bnf_index) |
|  | Contact your local managed care organization (MCO) to assess the child's eligibility for services. If eligible, ensure the child is added to the Registry of Unmet Needs (also known as the "waitlist") for the NC Medicaid Waiver. | If eligible for the waiver, get on the registry of unmet needs as early as possible– infancy is not too young! | Individual and guardian/family, MCO | [DHHS IDD Resources](https://www.ncdhhs.gov/divisions/mental-health-developmental-disabilities-and-substance-use-services/intellectual-and-developmental-disabilities)  [LME MCO Directory](https://www.ncdhhs.gov/providers/lme-mco-directory)  [NC Innovations Waiver](https://medicaid.ncdhhs.gov/providers/programs-and-services/behavioral-health-idd/nc-innovations-waiver) |
|  | Contact your local MCO to ask about eligibility for home and community services. Even if an individual is still on the registry of unmet needs, they may qualify for other services. | Contact MCO at least once a year, starting at 14 (there are oftentimes updates in policies/services available) | Individual and family, MCO | [Accessing IDD Resources](https://www.ncdhhs.gov/20230816accessing-idd-resourcescolor/download?attachment) |
|  | If medically fragile/physically disabled, contact your local MCO to assess the child or adult's eligibility for the Community Alternatives Program (CAP). | As early as possible– children and adults may be eligible | Individual and guardian/family, MCO | [CAP/DA](https://medicaid.ncdhhs.gov/providers/programs-and-services/long-term-care/community-alternatives-program-disabled-adults-capda) |
|  | Care coordinators are assigned to help MCO clients and their families. If you do not know how to contact your assigned care coordinator, contact your MCO's help line. | As early as possible | Individual and guardian/family, MCO | [LME MCO Directory](https://www.ncdhhs.gov/providers/lme-mco-directory) |
|  | Re-contact your care coordinator/MCO to check your child's status on the waitlist (If applicable) and share any updated medical or behavioral changes. | Annually | Individual and guardian/family, MCO |  |
|  | Become familiar with the difference between a Medicaid standard plan versus tailored plan, and in collaboration with your MCO, determine which option is most appropriate for your child. Most people with IDD will qualify for the tailored plan. | Once enrolled in Medicaid | Individual, Family/Guardian, MCO | [Comparison of NC Medicaid Plans](https://www.alliancehealthplan.org/document-library/74413/)  [NC Medicaid Managed Care](https://ncmedicaidplans.gov/en)  [What is care management?](https://www.arcnc.org/what-is-care-management?fbclid=IwAR2ALin1M6-i1z3IdbWs1GY5DTYI1lrOmBF1nWduRVSYjde3HeOt8GUyEuQ) |
|  | If your child is (a) medicaid-eligible and (b) between the ages of 0-21, become familiar with the "Early Periodic Screening, Diagnostic and Treatment Medicaid Services for Children" (EPSDT) and ask your child's case manager about it. | As early as possible | Individual, Family/Guardian, MCO | [Wellness visits](https://medicaid.ncdhhs.gov/epsdt) |
|  | Ask your care coordinator about whether your child is eligible for 1915(i) services, which includes supported employment, respite, and community living supports. Having the waiver is NOT required to receive these services! | As early as possible | Individual, Family/Guardian, MCO | [1915(i) State Plan](https://medicaid.ncdhhs.gov/blog/2023/06/30/nc-medicaid-obtains-approval-1915i-state-plan-amendment)  [1915(i) services](https://disabilityrightsnc.org/news/1915i-services/#:~:text=Attention%20all%20people%20in%20NC,i)%20services%20start%20July%201.) |
|  | If your child does not have medicaid, ask your managed care organization what services they may qualify for. | As early as possible | Individual, Family/Guardian, MCO | [NC DHHS service definitions](https://www.ncdhhs.gov/providers/provider-information/mental-health-development-disabilities-and-substance-use-services/service-definitions) |
|  | If the person is eligible for SSDI as a child (so, parent is retired, deceased, or disabled), the person will be eligible for Medicare and should learn how to navigate it. Medicare will be their primary healthcare funding, whereas Medicaid would be secondary. | Circumstantial | Individual, Family/Guardian, Medicare help line | [SSDI & Medicare Coverage](https://www.healthcare.gov/people-with-disabilities/ssdi-and-medicare/) |
| **✅** | Navigating Social Security | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Become familiar with SSI and the application process. | 16 | Individual, Family/Guardian, Social Security Administration, Benefits Counseling Services | [Social security income](https://www.ssa.gov/ssi?utm_medium=cpc&utm_source=bing&utm_content=ssi-disability-ad4&utm_campaign=cm-ssi-english) |
|  | Become familiar with the benefits reductions that could happen if you get legally married OR live with a long term partner, due to income/resource limits. | 16 | Individual, Family/Guardian, Social Security Administration, Benefits Counseling Services | [Treatment of married couples in the SSI program](https://www.ssa.gov/policy/docs/issuepapers/ip2003-01.html#:~:text=In%20the%20Supplemental%20Security%20Income,not%20as%20husband%20and%20wife.) |
|  | Find your Social Security Administration office by searching your zip code (linked in resource column). | 17.5 | Individual, Family/Guardian | [SSA office locator](https://secure.ssa.gov/ICON/main.jsp) |
|  | Upon turning 18, SSI is based on the disabled individual's income rather than the family income. So, apply or seek out a re-evaluation. \*Be aware, an individual with more than 2000 in assets will be penalized (car and home are not counted). | 18 | Individual, Family/Guardian, Social Security Administration, Benefits Counseling Services | [Social security income](https://www.ssa.gov/ssi?utm_medium=cpc&utm_source=bing&utm_content=ssi-disability-ad4&utm_campaign=cm-ssi-english)  [SSA office locator](https://secure.ssa.gov/ICON/main.jsp) |
|  | Learn about resource/asset limits and consider opening an ABLE account. Seek out benefits counseling through Service Source or Vocational Rehabilitation. | For the ABLE account, have to be diagnosed with a disability before the age of 26. An ABLE account or Special Needs Trust can be opened at any age. | Family/Guardian, Benefits Counseling Services | [What are ABLE accounts?](https://www.ablenrc.org/what-is-able/what-are-able-acounts/)  [Cuentas ABLE](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2022/06/ABLE-Account-SPANISH.pdf) |
|  | If the parent becomes deceased, disabled, or retired, it will impact the adult child's benefits. "Disabled adult child" benefits will be triggered. Seek out benefits counseling to learn about what this will mean for your family. Additionally, notify your MCO care coordinator. | When applicable | Family/Guardian, Benefits Counseling Services | [NC benefits counseling services](https://www.servicesource.org/north-carolina-benefits-counseling-services/)  [Work incentives and benefits counseling](https://www.ncdhhs.gov/divisions/vocational-rehabilitation-services/work-incentives-and-benefits-counseling)  [SSDI Benefits: how to qualify](https://www.ssa.gov/benefits/disability/qualify.html) |
|  | Learn about social security programs such as the Ticket to Work and Benefits Counseling and policies such as Work Incentives (i.e., Student Earned Income Exclusion). | Age Limit to access Student Earned Income Income Exclusion is 22 | Family/Guardian, Benefits Counseling Services | [NC benefits counseling services](https://www.servicesource.org/north-carolina-benefits-counseling-services/)  [Work incentives and benefits counseling](https://www.ncdhhs.gov/divisions/vocational-rehabilitation-services/work-incentives-and-benefits-counseling) |
|  | If receiving multiple benefits from multiple funding streams (i.e., Medicaid AND SSI, SSI and Section 8), seek out benefits counseling and counseling from your SSI case manager to learn how these interact with each other and prevent losing your benefits. | When applicable | Family/Guardian, Benefits Counseling Services | [NC benefits counseling services](https://www.servicesource.org/north-carolina-benefits-counseling-services/)  [Work incentives and benefits counseling](https://www.ncdhhs.gov/divisions/vocational-rehabilitation-services/work-incentives-and-benefits-counseling) |

# Financial Well-being Action Plan

Teaching individuals skills that further their economic self-sufficiency and ability to control personal finances is vital to their success as adults. Learning with practice needs to start as early as possible. Families play an important role in financial planning for the future.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

*action, one step at a time!*

Acronym Key: PASS=Plan for Achieving Self Support , ABLE= Achieving a Better Life Experience

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| **✅** | Managing money | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Learn about money: why is it important, how does it work?, What do typical items cost?, How do you get money?, How do you pay for items? | As early as possible & ongoing | Individual, Family/guardian, School/IEP Team | [Financial Wellness Tools](https://www.nationaldisabilityinstitute.org/downloads/#financial-toolkit)  [Money Management for Young People on the Spectrum](https://worktogethernc.com/resource/money-management-for-young-people-on-the-spectrum/) |
|  | Consider strategies for practicing earning and using money, for example: an allowance for doing chores or a simple neighborhood "job" such as walking a neighbor's dog or helping to clean in a neighbor's yard. | As early as possible & ongoing | Individual, Family/guardian | [How to Teach Money Management for Independent Living with Autism - Autism Awareness](https://autismawarenesscentre.com/how-to-teach-money-management-for-independant-living-with-autism/) |
|  | Learn about budgeting and "needs versus wants" as this fits for different ages. Learn how goals work with budgeting. | As early as possible & ongoing | Individual, Family/guardian, School/IEP Team | [New money management lessons for adults with disabilities - MI Money Health](https://www.canr.msu.edu/news/new-money-management-lessons-for-adults-with-disabilities)  [Financial Wellness Tools](https://www.nationaldisabilityinstitute.org/downloads/#financial-toolkit) |
|  | Explore options with your bank (e.g., joint bank account) to learn about money and management. | As early as possible & ongoing | Individual, Family/guardian | [Your Money, Your Goals Focus on People with Disabilities](https://files.consumerfinance.gov/f/documents/cfpb_ymyg_focus-on-people-with-disabilities.pdf)  [Lessons Materials on Money Management for Caregivers and People with Disabilities](https://worktogethernc.com/resource/11736/) |
|  | Learn about money safety, how to say spot scams and how to say "no" to requests for money. | As early as possible & ongoing | Individual, Family/guardian | [Identity Theft and Scams](https://www.nationaldisabilityinstitute.org/financial-resilience-center/identity-theft/)  [Beware of Scams - MI Money Health](https://www.canr.msu.edu/mimoneyhealth/beware_of) |
|  | Consider opening an ABLE account, which allows people with disabilities to save money for certain categories of expenses without affecting their benefits. | As early as possible & ongoing | Individual, Family/guardian, NC ABLE staff | [ABLE - Connecting People with Disabilities](https://www.ablenrc.org/)  [ABLE Accounts](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2021/07/ABLE-Account-Updated-Jan-2022-1.pdf)  Spanish: [Cuentas ABLE](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2022/06/ABLE-Account-SPANISH.pdf) |
|  | Consider estate planning, living trust and special needs trust. Seek out a lawyer that specializes in special needs trusts. | As early as possible & ongoing | Family/guardian, Lawyer | [ABLE- Special Needs Trust](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2021/07/Special-Needs-Trust-Updated-Jan-2022.pdf)  Spanish: [Fideicomiso para necesidades especiales](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2022/06/Special-Needs-Trust-SPANISH.pdf)  [ABLE- Living Trust](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2021/07/Living-Trust-Updated-Jan-2022.pdf)  Spanish: [ABLE- Fideicomiso en vida](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2022/06/Living-Trust-SPANISH.pdf) |
|  | Write a letter of intent for your special needs trust. | As early as possible | Family/guardian, Lawyer | [Letter of Intent Planning Guide](https://worktogethernc.com/resource/letter-of-intent-planning-guide/)  [Letter of Intent- SNA](https://www.specialneedsalliance.org/the-voice/letter-of-intent-4/) |
|  | Revisit your will. | Every 8 years | Family/guardian, Lawyer |  |
|  | Learn about Financial Wellness. What does this mean?, What does it look like for individuals with disabilities? | Middle School & ongoing | Individual, Family/guardian, School/IEP Team | [Meet the Faces of Financial Wellness - National Disability Institute](https://www.nationaldisabilityinstitute.org/blog/meet-the-faces-of-financial-wellness/) |
|  | Consider obtaining a debit card and/or credit card, with safeguarding strategies and monitoring as needed (i.e., prepaid cards, spending limits). | Middle to High school | Individual, Family/guardian | [Green Light Debit Card](https://greenlight.com/main/learn-more?g_acctid=923-791-4284&g_adgroupid=127254767416&g_adid=617223147820&g_adtype=search&g_campaign=Prospecting_Lead_Brand_Google_US_Search_Branded_canary&g_campaignid=14551814286&g_keyword=green%20light%20debit%20card&g_keywordid=kwd-406333315090&g_network=g&utm_source=adwords&utm_medium=cpc&utm_campaign=14551814286&utm_term=green%20light%20debit%20card_e&utm_device=c&utm_content=brand&gad_source=1&gclid=CjwKCAjw7oeqBhBwEiwALyHLM-exonRyTi9oa_4xc2wBZrrRFbN6qAEQLQmepCuCRZJVmGbAwNMwbxoCsogQAvD_BwE)  [Comparison Chart of Types of Cards to Use for Purchases](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2022/11/ndi-comparison-guide-debit-credit-prepaid-2022.pdf) |
|  | Learn about paying taxes. | High school | Individual, Family/guardian | [National Disability Institute: Taxes and Tax Preparation](https://worktogethernc.com/resource/national-disability-institute-taxes-and-tax-preparation/) |
|  | Ask about including financial well being goals planning in transition plan portion of IEP. | High school | Individual, Family/guardian, School/IEP Team | [STAR Goal Setting Worksheet](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2021/04/star-goal-setting-worksheet-ndi-tool.pdf) |
|  | Explore online money management tools. | High school | Individual, Family/guardian | [Online Money Management Tools](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2018/11/top-picks-for-online-money-management-tools.pdf)  [10 Questions to Ask When Selecting an Online Money Management Tool](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2018/11/ten-questions-to-ask-when-selecting-an-online-money-management-tool.pdf) |
| **✅** | Accessing Financial Support | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Seek out benefits counseling services. | As early as possible | Individual and family/guardian, Benefits Counseling Services | [Work Incentives and Benefits Counseling](https://www.ncdhhs.gov/divisions/vocational-rehabilitation-services/work-incentives-and-benefits-counseling)  [North Carolina Benefits Counseling Services](https://www.servicesource.org/north-carolina-benefits-counseling-services/#:~:text=English%20and%20Spanish.-,VR%20Benefits%20Counseling%20Services%20for%20SSI%2FSSDI%20beneficiaries,western%20part%20of%20the%20State). |
|  | Learn about financial rights for individuals with disabilities. | Middle school | Benefits counseling services, Attorneys, Local Banks | [Blog: Financial Inclusion 101 - National Disability Institute](https://www.nationaldisabilityinstitute.org/illinois/financial-inclusion-101/) |
|  | Figure out the areas in which support is needed by taking a financial well-being assessment. | 16 | Individual and family/guardian | [Financial Well-Being Assessment](https://worktogethernc.com/resource/financial-well-being-assessment/) |
|  | Determine the need for government-based financial support (Supplemental Security Income, Social Security Disability Insurance, Medicaid, Medicare). See Adult Services action plan for more details. | 16 | Individual and family/guardian | [Adult Services Action Plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |
|  | Consider establishing a Representative Payee for Social Security Benefits/Medicaid/Medicare, if appropriate. | 18 | Individual | [Frequently Asked Questions (FAQs) for Representative Payees](https://www.ssa.gov/payee/faqrep.htm) |
|  | Consider other sources of Income and Savings: Savings Accounts, PASS Accounts, Individual Development Accounts. | High school | Individual and family/guardian, Social Security Administration, Benefits Counseling Services | [Frequently Asked Questions (FAQs) for Representative Payees](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2022/11/ndi-comparison-guide-checking-savings-able-2022.pdf)  [Examples of types of accounts to keep your money safe](https://www.nationaldisabilityinstitute.org/wp-content/uploads/2022/11/ndi-decision-tree-checking-accounts-2022.pdf)  [Plan to Achieve Self-Support (PASS)](https://www.ssa.gov/disabilityresearch/wi/pass.htm) |
|  | Contact NC financial assistance programs such as First in Families, Temporary Assistance for Needy Families, Community colleges, Religious organizations. | When needed | Individual and family/guardian | [Assistance programs in North Carolina.](https://www.needhelppayingbills.com/html/north_carolina_assistance_prog.html)  [First In Families of North Carolina](https://fifnc.org/) |

# Transportation Action Plan

Transportation is a key barrier to employment and community participation for many individuals with disabilities. Accessible transportation options, like paratransit and public transit, can help break down these barriers and offer a gateway to opportunity and adventure in adulthood.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: EIPD= Division of Employment and Independence for People with Disabilities

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| **✅** | Finding ways to get around | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore Work Together NC's library of transportation options and services. | As early as possible and ongoing | Individual and family | [Find Services](https://worktogethernc.com/services/?_services_type=transportation) |
|  | Review Work Together NC's guide to transportation options for people with IDD in NC. | As early as possible and ongoing | Individual and family, School/IEP Team | [Transportation In North Carolina: A Guide to Transportation Services, Problems, & Solutions](https://worktogethernc.com/resource/transportation-in-north-carolina-a-guide-to-transportation-services-problems-solutions/) |
|  | Practice community safety skills (i.e., identifying signs, using crosswalks, being aware, etc.). | As early as possible and ongoing | Individual, family, and school/IEP Team | [Courses for Parents to Teach Community Safety Skills | Cursos para que los padres enseñan habilidades de seguridad en la comunidad](https://worktogethernc.com/resource/courses-for-parents-to-teach-community-safety-skills/) |
|  | Practice using Google Maps or other map apps. | Middle school and ongoing | Individual, family, and school/IEP Team | [Google Maps](https://www.google.com/maps) |
|  | Explore/practice transportation options (public, paratransit, uber/lyft). Consider factors such as cost, safety, and level of support needed. | As early as possible and ongoing | Individual and family, school/IEP Team, community agencies, EIPD counselor | [Paratransit: FAQ](https://disabilityrightsnc.org/resources/paratransit-faq/) |
|  | Obtain driver's training and license, if appropriate. | 15 or later | Individual, family, and community agencies | [Official NCDMV: Online Services](https://www.ncdot.gov/dmv/offices-services/online/Pages/default.aspx) |
|  | Ask your EIPD counselor about funding for a driver assessment and training. | 15 or later | Individual, family, EIPD counselor |  |
|  | Ask about including transportation goals in transition plan portion of IEP. | High school | Individual and family, School/IEP Team |  |
| **✅** | Using public or paratransit | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | If interested in public transit, download apps for your local area. | As early as possible and ongoing | Individual with help of others |  |
|  | Create a personal transportation plan, including your chosen mode(s) of transportation and any "Plan B"/back up plan options. | As early as possible and ongoing | Individual and family |  |
|  | If appropriate, apply for paratransit. | 15 | Individual, family with support from school/IEP Team/transition facilitator and community agencies | [Your Rights and Responsibilities for Paratransit](https://worktogethernc.com/resource/your-rights-and-responsibilities-for-paratransit/) |
|  | Utilize the toolkits and instructional videos in the transportation section Work Together NC's resource library. | Starting at age 15 | Individual, family, and school | [Find Resources- Transportation](https://worktogethernc.com/resources/?_resource_tags_2=transportation)  [Transportation Toolkit](https://worktogethernc.com/resource/transportation-toolkit/) |
|  | Seek out public or paratransit training, ideally through a peer mentorship model. The transportation section of Work Together NC's service library lists several transit training programs designed for people with IDD. | 16 | Individual, family, community agencies | [Find Services](https://worktogethernc.com/services/?_services_type=transportation) |

# IEP Action Plan

When youth with an IEP turn 16 years of age, they will actively engage in individualized transition planning. This process helps youth learn about themselves, make decisions, set goals, and interact with their IEP team to identify objectives and activities.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: EIPD= Division of Employment and Independence for People with Disabilities. AC=Adapted Curriculum. OCS=Occupational Course of Study FRC=Future Ready Core. IEP = Individualized Education Program . SSI=Supplemental Security Income. SSDI= Social Security Disability Insurance.

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| **✅** | Items to include in the IEP | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Develop parent/student's vision for future (after high school). | Age 16 (state required)  Age 11-14 (best practice)  k-6 (recommended) | Student, Family, School/IEP Team | [I'm Determined](https://www.imdetermined.org/) |
|  | Complete age-appropriate transition assessments which help identify needs, preferences, and interests for post-school goals. | Age 16 (state required)  Age 11-14 (best practice)  k-6 (recommended) | School/IEP Team | [Indiana Secondary Transition Resource Center](https://instrc.indiana.edu/transition-resources/transition-matrix.html) |
|  | Develop the secondary transition goals on the IEP (education/training, employment, and independent living). | Age 16 (state required)  Age 11-14 (best practice)  k-6 (recommended) | Student, family, school/IEP Team, EIPD | [Overview of Transition section IEP (DPI)](https://www.dpi.nc.gov/documents/ec/module4b-secondary-transition/download?attachment) |
|  | Determine transition activities and instruction needed to reach secondary transition goals. At minimum, 1 measurable annual goal should be related to a transition goal. | Age 16 (state required)  Age 11-14 (best practice)  k-6 (recommended) | Student, family, school/IEP Team, EIPD | [Pre-Employment Transition Services](https://transitionta.org/topics/pre-ets/)  [Secondary Transition in North Carolina](https://files.constantcontact.com/77b9bb19001/f8729f65-6faf-4a98-bf73-153f0b072aa9.pdf) |
|  | Outline accommodations and modifications required for student to access their education. | K-12 | Student, family/ School/IEP Team | [Neuron and Rose Psychological Services](https://www.neuronandrosepsychology.com/blog/neurodiverent-affirming-iep-accommodations-for-autistic-and-adhd-ers-in-high-school-settings)  [Special Education and Accommodations - Exceptional Children's Assistance Center (ECAC)](https://www.ecac-parentcenter.org/special-education-and-accommodations/)  [Ultimate List of IEP Accommodations, Modifications & Strategies (SDIs)](https://adayinourshoes.com/wp-content/uploads/IEP-Accommodations-and-Strategies-printable.pdf) |
|  | If applicable, identify related services and service delivery frequency (SLP, OT, PT, etc). | K-12 | Student, family/ School/IEP Team | [Transitions for Children and Youth- How Occupational Therapy Can Help](https://www.p2pga.org/wp-content/uploads/2019/05/Transitions_for_Children_and_Youth.pdf)  [NC School-Based Physical Therapy](https://www.med.unc.edu/healthsciences/physical/schoolbasedpt/resources/best-practice-resources/)  [School-Based Service Delivery in Speech-Language Pathology (asha.org)](https://www.asha.org/SLP/schools/School-Based-Service-Delivery-in-Speech-Language-Pathology/#:~:text=School-Based%20Service%20Delivery%20in%20Speech-Language%20Pathology%201%20Approaches,...%208%20Varied%20Service%20Delivery%20...%20More%20items) |

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| **✅** | IEP Meeting Considerations | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Student should be invited to IEP (regardless of their Course of Study) and supported to express their interests, needs, and goals. Best practice is to prepare the student before the meeting. | K-12 (Best practice) | Individual, Family/Guardian, School/IEP Team | [10 Ways to Involve Young Adults in their IEP Meetings](https://www.thepathway2success.com/10-ways-to-involve-young-adults-in-their-iep-meetings/) |
|  | Review course of study options (i.e., certificate versus diploma pathways) to ensure best fit. Present levels and assessment data should inform this decision.  \*once student is in a course of study, changing it happens in unique circumstances. There are implications for graduation timelines. | Age 11-14 (before high school) | Individual, Family,/Guardian School/IEP Team | [High School Graduation Requirements](https://www.dpi.nc.gov/districts-schools/high-school-graduation-requirements#Future-ReadyCourseofStudy22creditsStudentsenteringGrade9in2021-2022-1951)  [Heading to High School: Choosing a Course of Study](https://files.constantcontact.com/77b9bb19001/062c9703-a810-4920-b5ee-127a5858e669.pdf) |
|  | Attend IEP meetings and discuss transition goals and services. | Age 16 (state required)  Age 11-14 (best practice)  k-6 (recommended) | Individual, Family/Guardian, School/IEP Team, EIPD | [Transition Goals in the IEP | Center for Parent Information and Resources](https://www.parentcenterhub.org/transition-goals/) |
|  | A representative from any agency likely to be responsible for providing/paying for transition services can attend IEP meeting(s) with parent consent (if student is not 18 already). | K-12 | Individual, Family/Guardian, School/IEP Team, EIPD, Managed Care Organization |  |
|  | Discuss transfer of rights one year prior to 18, when rights to make decisions for the IEP will fully transfer to the student (unless alternatives to guardianship have been established). | Age 17 | Individual, Family/Guardian, School/IEP Team, EIPD | [DRNC Guardianship Info](https://disabilityrightsnc.org/what-we-do/our-advocacy-work/guardianship/) |
|  | Discuss progress towards graduation requirements. This includes IEP goals. | As early as possible & ongoing | Individual Family/Guardian, School/IEP Team |  |
|  | Discuss desired age of exit (18, 19, 20, 21 or year of 22nd birthday) based on the student's progress and goals. Note, anyone with an IEP can advocate for extended time in school after turning 18. \*Note: FRC and OCS students who choose to exit at year 5 (i.e., instead of year 4) will need to follow district policy for graduation requirements. Specific pacing of scheduling core courses will be necessary for student to be enrolled. | Throughout high school | Individual Family/Guardian, School/IEP Team | [When your child with an IEP turns 18: Your parental rights](https://www.understood.org/en/articles/when-your-child-with-an-iep-turns-18-your-parental-rights) |
|  | IEP Team should refer the student to get evaluated for adult services through the NC Division of Employment and Independence for People with Disabilities. \*Note: Evaluation for EIPD adult services could risk in school EIPD services if the student is deemed ineligible for "competitive integrated employment". | FRC/OCS - Age 17-18  AC: Age 21 | School, EIPD, Family/Guardian | [Transition Planning - DRNC](https://disabilityrightsnc.org/resources/transition-planning/) |
|  | During the re-evaluation cycle (required every 3 yrs), the IEP team should discuss the need for specific evaluations necessary for enrollment in adult services (i.e., EIPD, Medicaid--see Healthcare Checklist, SSI, SSDI and postsecondary education--see PSE--Postsecondary Education and Adult Services Checklists). | K-12 | School/IEP Team | [Adult Services Action Plan](https://worktogethernc.com/action-plans/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly/how-can-i-make-sure-the-transition-to-adulthood-goes-smoothly-adult-services-action-plan/) |
| **✅** | Other supports for transition planning, outside of school based services | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore Work Together NC's library of transition planning services. | As early as possible | Individual, Family/Guardian | [Find Services](https://worktogethernc.com/services/?_services_type=transition-planning) |
|  | Contact the Exceptional Children's Assistance Center for help understanding and advocating for your rights within the school system. | When needed | Individual, Family/Guardian | [Exceptional Children's Assistance Center](https://www.ecac-parentcenter.org/)  [A Parents’ Guide to Special Education in North Carolina | Children's Law Clinic Resources (duke.edu)](https://sites.law.duke.edu/childedlaw/special-education-nc/) |
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# Self Determination/Self Advocacy Action Plan

Self-determination is the ability to make decisions about one's quality of life without undue interference or influence from others. Self advocacy is the ability to communicate one's needs and preferences.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: IEP=Individualized Education Program

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| **✅** | Growing as a self-advocate | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Practice communication of one's interests, preferences, and needs. | As early as possible & ongoing | Family, school/IEP Team, adult service providers | [Student dream sheet](https://www.ecac-parentcenter.org/wp-content/uploads/Student-Dream-Sheet.pdf)  [Self awareness for self advocacy](https://worktogethernc.com/resource/self-awareness-for-self-advocacy-student-version/) |
|  | Practice decision making skills. Choices should be offered & supported as often as possible– start with small choices matter like what one wears, eats, does for fun, who one hangs out with. | As early as possible & ongoing | Individual, Family, school/IEP Team, adult service providers | [Supported decision making](https://supporteddecisionmaking.org/) |
|  | Identify needed adult services, and if appropriate, the individual can start learning how to direct and manage these services. | As early as possible & ongoing | Individual, family, school/IEP Team, adult service providers | [Self directed services](https://www.medicaid.gov/medicaid/long-term-services-supports/self-directed-services/index.html)  [Self directed services](https://www.arcnc.org/programs-and-services/self-direction) |
|  | Support the student to participate in their own IEP Meetings. Prepare the individual with what to expect, seek their input on goals, and come up with ideas to contribute in advance of the meeting. | As early as possible & ongoing | Individual, family, school/IEP Team | [10 Ways to Involve Young Adults in their IEP meetings](https://www.thepathway2success.com/10-ways-to-involve-young-adults-in-their-iep-meetings/) |
|  | Developing decision making skills | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Explore Work Together NC’s leadership & advocacy program library. | As early as possible & ongoing | Individual, family, school/IEP Team | [Advocacy programs](https://worktogethernc.com/services/?_services_type=advocacy) |
|  | Learn about the disability rights movement and key figures. | As early as possible & ongoing | Individual, school/IEP Team | [Crip Camp](https://www.youtube.com/watch?v=OFS8SpwioZ4) |
|  | Learn about supported decision-making and alternatives to guardianship. | As early as possible & ongoing | Individual, family, school/IEP Team, adult service providers | [Rethinking guardianship](https://rethinkingguardianshipnc.org/)  [Self advocacy action plans](https://worktogethernc.com/action-plans/making-choices-is-hard/supported-decision-making-action-plan/) |
|  | Learn about the differences in the laws regarding disability rights for young people with disabilities from high school to adulthood. | As early as possible & ongoing | Individual, school/IEP Team | [Making the transition from high school to college](https://www.vmi.edu/media/content-assets/documents/disabilities-services/Assisting-Students-Making-the-Transition-to-College.pdf) |
|  | Learn and practice how to explain one's disability and/or the accommodations or supports they need in work, postsecondary education, and community settings. | As early as possible & ongoing | Individual, school/IEP Team, adult service providers | [Effective accommodation practices](https://worktogethernc.com/resource/effective-accommodation-practices-disability-disclosure-and-employment/)  [Disability disclosure FAQs](https://transitiontn.org/wp-content/uploads/2020/04/PSE_Disabilty-Disclosure-FAQs_04-16-20_FINAL.pdf) |
|  | Develop a person centered plan, including the individual's vision and goals for adulthood. | Upon exiting high school and ongoing updates | Individual, inclusive postsecondary education program (if applicable), adult service providers | [Person centered planning](http://project10.info/DPage.php?ID=103) |

# Supported Decision Making & Guardianship

An individual is legally considered an adult at the age of 18. This is called the age of majority. Before this happens, an individual and their family/care partner will need to decide on how to support the young adult's self-determination. Supported decision-making refers to the many ways we all get assistance making decisions that affect our lives. Full or limited guardianship is appropriate when the young adult is unable to understand or make their own decision.

*Instructions: (1) Check off any items that have already been completed (2) Delete or cross out any items that do not apply to you or the person you’re supporting (i.e., it doesn't align with their goals) (3) Keep any action items that will help you or the person you're supporting achieve their goals.(4) Start taking action, one step at a time!*

Acronym Key: SDM= Supported Decision Making. IEP=Individualized Education Program

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| **✅** | Supported Decision Making | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Understand what supported decision-making (SDM) includes and how to use it. | 12 | Individual and family | [Supporting choice and self determination videos](https://rethinkingguardianshipnc.org/supporting-choice-and-self-determination-videos/)  [Supported decision making](https://supporteddecisions.org/about-supported-decision-making/)  [SDM and alternatives to guardianship](https://worktogethernc.com/wp-content/uploads/Supported-Decision-Making-and-Alternatives-to-Guardianship.pdf) |
|  | Develop and practice decision-making skills. | 12 | Individual and family | [Supporting choice and self determination videos](https://rethinkingguardianshipnc.org/supporting-choice-and-self-determination-videos/) |
|  | Continually evaluate decision-making skills and capacity. | 12 | Individual and family | [MO Guardianship](https://moguardianship.com/#materials) |
|  | Set developmentally-appropriate goals to develop decision-making skills through SDM. | 12 | Individual and family | [Lifecourse nexus](https://www.lifecoursetools.com/lifecourse-library/exploring-the-life-domains/supported-decision-making/) |
|  | Contact Disability Rights NC if interested if advocacy assistance is needed related to guardianship or restoration of a person's guardianship. | Circumstantial | Disability Rights NC | [Restoration to competency](https://disabilityrightsnc.org/resources/restoration-to-competency/)  [DRNC Contact Form](https://disabilityrightsnc.org/contact-us/) |
| **✅** | IEP Process | **Approximate Age** | **Who can help?** | **Resources**  *Click the links to view and download* |
|  | Support the student to have input on their IEP goals through practice expressing one's needs, preferences, and interests. | As early as possible and ongoing | Individual, School/IEP team, and family | [Self advocacy IEP goal ideas](https://worktogethernc.com/resource/self-advocacy-skills-iep-goal-ideas/) |
|  | If a student is not participating already, they should begin to participate in the IEP meeting. This is an important opportunity for the student to practice self-determination and learn how to advocate for their own future. | 14 | Individual, School/IEP team, and family | [4 ways students can take an active role in IEP meetings](https://www.edutopia.org/article/4-ways-students-can-take-active-role-their-iep-meetings)  [Student involvement in the IEP](https://worktogethernc.com/wp-content/uploads/Student-Involvement-in-the-IEP-Manual.pdf) |
|  | The IEP Team will discuss the transfer of rights at least one year prior to the student reaching age 18, age of majority. This is to make sure the student and parents understand that the student’s right to make educational decisions for the IEP will transfer to the student when he or she turns 18. \* In most cases, the transfer of rights at age 18 is an appropriate action. In some cases, if the student is unable to understand or make their own decisions, parents may wish to consider full or limited guardianship. Keep in mind there are many alternatives to guardianship. Supported decision-making offers a range of options that give parents an opportunity for continued input into the student's educational path. | 17 | Individual, School/IEP team, and family | [Rethinking guardianship NC](https://rethinkingguardianshipnc.org/) |

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| **✅** | Preparing to turn 18 | **Approximate Age** | **Who can help?** | **Resources** |
|  | Understand what legal status and age of majority mean. It is important that all are aware of the legal changes that happen when a person turns 18 and what it means for the individual and the family/care partner regarding decision making. | 12 | Individual and family, special needs attorney | [Getting ready for the age of majority](https://worktogethernc.com/resource/getting-ready-for-when-your-teen-reaches-the-age-of-majority-a-parents-guide/) |
|  | Support the individual's development of communication skills for sharing personal information such as mailing address, date of birth, phone number. Address safety precautions regarding protecting this information. | 12 and ongoing | Individual and family | [Learning how to provide personal information](https://worktogethernc.com/resource/learning-how-to-provide-important-personal-information/)  [Be internet awesome](https://worktogethernc.com/resource/be-internet-awesome-sea-increible-en-internet/) |
|  | Set up power of attorney and healthcare power of attorney to take effect when the individual turns 18. | 17 | Individual and family, special needs attorney | [General, financial, legal, and healthcare supports](https://rethinkingguardianshipnc.org/individual-pdfs/)  [Free NC medical power of attorney form](https://eforms.com/power-of-attorney/nc/north-carolina-health-care-power-of-attorney/) |
|  | Consider whether a limited guardianship, guardianship of the person and/or guardianship of the estate may be appropriate.\*With any of these options, supported-decision making is still an important tool for centering the individual in decisions that pertain to them. | 17 | Individual and family, special needs attorney | [Healthcare power of attorney](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2021/07/Healthcare-Power-of-Attorney-Updated-Jan-2022.pdf)  [Power of attorney](https://rethinkingguardianshipnc.org/wp-content/uploads/sites/1731/2021/07/Power-of-Attorney-Updated-Jan-2022.pdf) |
|  | If the individual is not their own guardian, ensure that designated guardianship wishes are relayed in the parents' will and letter of intent. | 18 | Individual and family, special needs attorney | [Succession planning for guardians](https://worktogethernc.com/resource/succession-planning-for-guardians/) |