

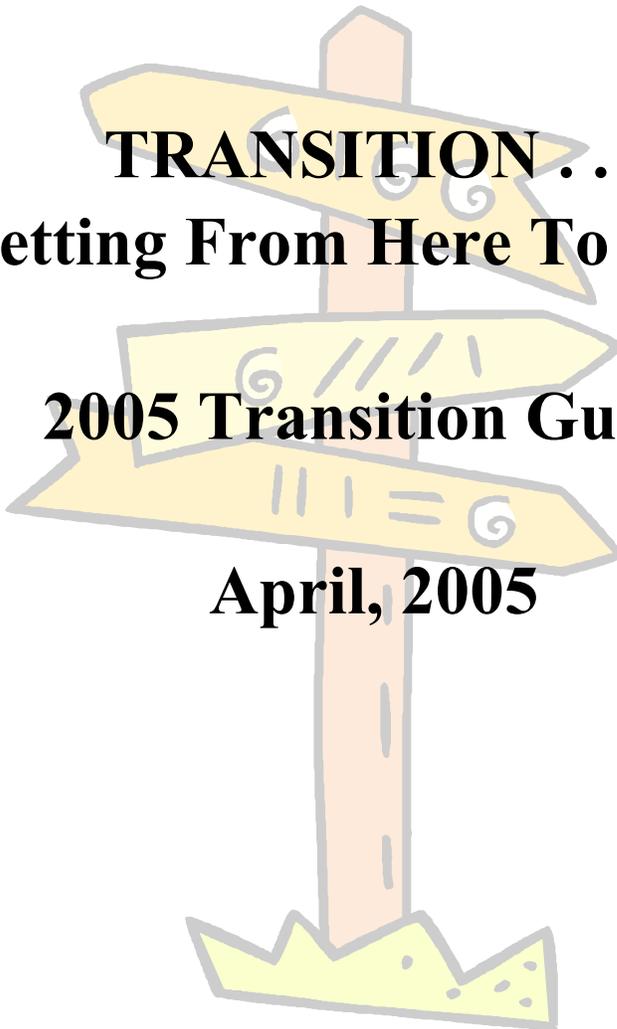


TRANSITION...
Getting From HERE to THERE



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Getting From Here To There

2005 Transition Guide

April, 2005

Preface

The guide has been compiled with the intent of providing you enough general information to build a framework for creating and achieving goals. However, there will be sections of this guide that may not apply to your particular situation. Information in this document is intended purely as a reference in the event you need to develop your own plan. This is not a step-by-step guide, but hopefully will give you some general direction and answers to questions.

As you read this guide, you may have questions on the information presented. You may want to write your questions down as you think of them. Answers may be found elsewhere in this guide. However, if you don't find the answers you need, consider contacting the school case manager or your primary contact person at the Area Agency. They can assist you in finding the answers.

Education is a partnership with the family, student and the school district. Ideally the transition process should begin in the eighth grade. The transition process should be highly individualized and applied throughout the school year. In order for the transition plan to be successful and have beneficial outcomes with long-term goals included, you must be the primary coordinator. This guide is intended for use by both students and parents. The strongest transition teams include both knowledgeable, invested students and parents who actively participate in transition planning.

There are many service agencies referred to in this guide, which you may find helpful in your endeavors. Remember, there are no magical solutions or instructions, and no one agency is "the answer" to all your needs.

It is important to know that if a student graduates and leaves school at age 18, adult services will not become available until age 21. Even then, services depend on the availability of funding from the state, and the status of the waiting list. In collaborating with the agencies in your community you will be able to create more opportunities for a fulfilling, safe life. There may be challenges along the way, but it is definitely worth the effort!

Acknowledgements

This transition guide was crafted through the collaborative efforts of the following individuals, facilitating the transition process with families throughout New Hampshire:

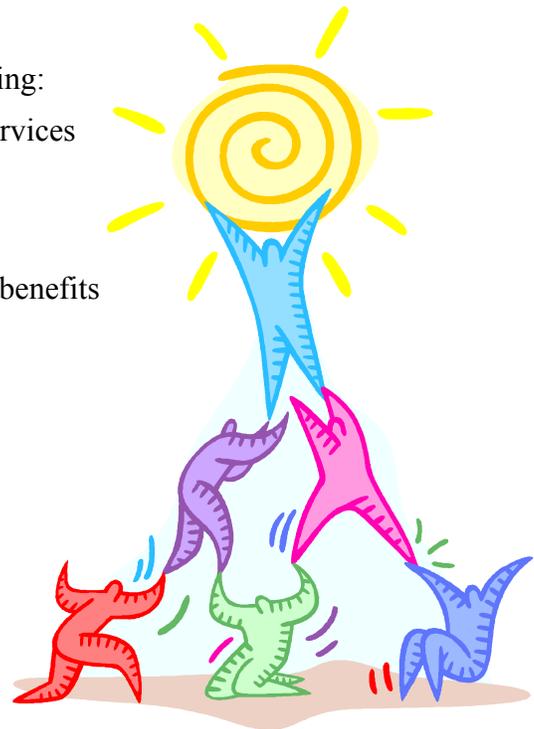
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Special thanks to Terri Cadorette for all her work in bringing this manual together for the benefit of our families.

New Hampshire Service System For Individuals with Developmental Disabilities

There are 12 Area Agencies that are divided into geographical regions throughout New Hampshire to provide services to individuals with developmental disabilities and their families. These Area Agencies are private non-profit agencies governed by a local Board of Directors. Each Area Agency contracts with the State of New Hampshire to provide services in a defined region. Types of services may vary from region to region as well as titles of individuals providing the services. Services include but are not limited to the following:

- Family Centered Early Supports and Services (Early Intervention)
- Service Coordination/Case Management
- Family Support Services - may include the following:
 - Information and referral to supports and services
 - Educational information
 - Transition planning information
 - Information regarding estate planning and benefits
 - Parent to Parent
 - Legislative information
 - Guardianship assistance
 - Respite
- Day Services
- Vocational Supports
- Residential Services
- Community Support Services
- Services for individuals with acquired brain disorders



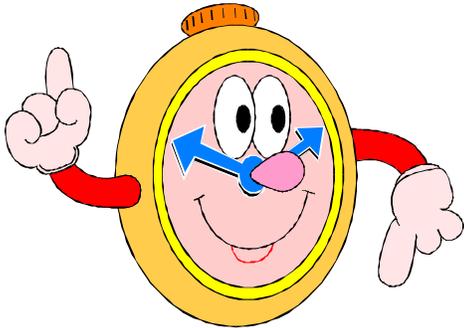
The list on the following page provides information about the area agencies as well as the primary contact numbers.

You can also find information on the Area Agencies at http://csni.org/nh_agency_map.htm

Area Agencies

<p>I</p>	<p>Northern NH Mental Health & Developmental Services (Region 1) 87 Washington Street Conway, NH 03818 447-3347 check website for other addresses www.nnhmhs.org</p>	<p>VII</p>	<p>Moore Center Services (Region 7) 132 Titus Avenue Manchester, NH 03103 668-5423 www.moorecenter.org</p>
<p>II</p>	<p>Developmental Services of Sullivan County (Region 2) 654 Main Street Claremont, NH 03743 542-8706</p>	<p>VIII</p>	<p>Community Developmental Services Agency (Region 8) Parade Office Mall, Suite 40 195 Hanover Street Portsmouth, NH 03801 436-6111 800-660-4103 www.cdsregion8.org</p>
<p>III</p>	<p>Lakes Region Community Services Council (Region 3) PO Box 509 Laconia, NH 03247-0509 800-870-7555 www.lrcsc.org</p>	<p>IX</p>	<p>Community Partners (Region 9) 113 Crosby Road, Suite 1 Dover, NH 03820-4375 749-4015 www.dssc9.org</p>
<p>IV</p>	<p>Community Bridges (Region 4) 525 Clinton Street Bow, NH 03304-4609 225-4153 800-499-4143 www.communitybridgesnh.org</p>	<p>X</p>	<p>Region X Community Support Services, Inc. (Region 10) 8 Commerce Dr. Suite 801 Atkinson, NH 03811 893-1299 www.region10nh.com</p>
<p>V</p>	<p>Monadnock Developmental Services (Region 5) 121 Railroad Street, Route 101 Keene, NH 03431 325-1304 800-469-6082 www.mds-nh.org</p>	<p>XI</p>	<p>Center of Hope (Region 11) 626 Eastman Road Ctr. Conway, NH 03813-4219 356-6921 800-290-0905 www.centerofhope.org</p>
<p>VI</p>	<p>Region VI Area Agency (Region 6) 144 Canal Street (1st floor) Nashua, NH 03060 882-6333 www.region6.com</p>	<p>XII</p>	<p>United Developmental Services (Region 12) 85 Mechanic Street, Suite 300 Lebanon, NH 03766 448-2077 www.uds.org</p>

Transition Timeline

Age 14 & 15	<ul style="list-style-type: none"> • Transition information shared through school. • Discuss graduation plans
Age 16	<ul style="list-style-type: none"> • Transition plan in place • Preliminary graduation plan in place
Age 17	<ul style="list-style-type: none"> • Discuss Social Security, Medicaid, guardianship options, post-secondary education
Age 18	<ul style="list-style-type: none"> • Begin investigating adult services and natural supports • Apply for Social Security & Medicaid. • Guardianship if appropriate • Post-secondary education plan in place
Age 19 & 20	<ul style="list-style-type: none"> • Continue to investigate adult services and natural supports • Wait List
Adult Life → → →	

Things to be sure to ask about:

- Division of Adult Learning and Rehabilitation (Voc Rehab)
- Mental Health Services
- Community Housing
- Post Secondary Education
- Graduation Requirements

Checklist

The following checklists may be helpful in addressing some of the most important areas in transition. Pages in the Transition Guide that may be helpful are listed. Please note: This is only a guide and should be modified to meet individual needs.

At age 14:

- _____ Connect with your local Area Agency, if you have not done this yet. (page 3)
 - _____ Discuss hopes, dreams and fears. Begin to create a picture of what life, as an adult will look like.
 - _____ Identify personal learning styles and the necessary accommodations for learning and working.
 - _____ Request transition information from your school and Area Agency. (page 3)
 - _____ Discuss change from middle to high school, and begin to prepare for this transition. (page 10)
 - _____ Discuss graduation options (Certificate of Completion/Diploma) and request information on your school's policies on graduation. (page 12)
 - _____ Introduce additional responsibilities and opportunities to develop decision-making skills.
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At age 15:

- _____ Explore new opportunities for growth, in and out of school.
 - _____ Consider involving the student more fully in the IEP process and the IEP meeting.
 - _____ Discuss graduation options (Certificate of Completion / Diploma). (page 12)
 - _____ Learn to effectively communicate your interests, preferences, needs and supports required for your specific disability.
 - _____ Continue to develop decision-making skills. Explore part time paid or volunteer work opportunities.
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At age 16:

- _____ Prepare for the IEP meeting. Student participates in the process at age 16.
 - _____ Create a transition plan with the IEP team. (page 10)
 - _____ Talk with the team and select a graduation plan. (page 12)
 - _____ Consider requesting a Vocational Evaluation through the school system to identify career interests and skills.
 - _____ Apply to Division of Adult Learning & Rehabilitation (Voc Rehab) for assistance with vocational planning and support. (page 13)
 - _____ Explore part time paid or volunteer work opportunities.
 - _____ Obtain a non-driver's ID and discuss driver's education if appropriate.
 - _____ Begin to explore local transportation options outside of family.
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At age 17:

- _____ Learn about Social Security and Medicaid benefits. (pages 15-18)
 - _____ Learn about / practice making informed decisions.
 - _____ Discuss guardianship and alternatives to guardianship. (page 23)
 - _____ Discuss post secondary education options with the team and guidance office. (page 14)
 - _____ Discuss and obtain current evaluations if student is going on to post secondary education.
 - _____ Make the appropriate arrangements for financial resources. (page 22)
 - _____ Revise transition plan. (page 10)
 - _____ Explore part time paid or volunteer work opportunities.
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At age 18:

- _____ Apply for Social Security and Medicaid benefits. (pages 19-20)
 - _____ Complete guardianship process or decide on alternatives to guardianship. (page 23)
 - _____ Distribute guardianship order and/or new releases as needed.
 - _____ Establish contact with post secondary representative if appropriate and develop a plan of what will need to be accomplished
 - _____ Revise the transition plan. (page 10)
 - _____ Build on part time paid or volunteer work skills and opportunities.
 - _____ Register for selective service (for males).
 - _____ Register to vote.
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At age 19:

- _____ Inform Area Agency of anticipated specific adult services support needs. (page 3)
 - _____ Review estate planning and create or update letter of intent. (page 22)
 - _____ Revise the transition plan. (page 10)
 - _____ Build on part time paid or volunteer work skills and opportunities.
 - _____ Consider a Vocational Evaluation through the school system to update skills obtained and current interests, as well as areas that need work.
 - _____ Discuss priority status on the Wait List. (page 27)
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Age 20:

- _____ Work with your Area Agency to develop several support plans to meet anticipated specific support needs for age 21 in the event that funds are not available for your first choice option.
 - _____ Discuss with your Area Agency the role of future team members and the process of obtaining adult services.
 - _____ Create a final, specific transition plan. (page 10)
 - _____ Ask team to create information sheets covering what would be helpful for the new team to know. (What worked well, what to avoid)
 - _____ Build on part time paid or volunteer work skills and opportunities.
 - _____ Begin a resume and update it as needed.
 - _____ Obtain letters of recommendation.
 - _____ Continue to work with the Division of Adult Learning & Rehabilitation (Voc Rehab) as needed.
 - _____ Ensure participation in school senior activities, if desired.
 - _____ Complete any applications for post secondary education programs.
 - _____ Obtain current evaluations prior to moving on to post secondary education or adult services
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If you are planning on leaving school prior to age 21, use the following checklist. Please be aware that funding for services are usually not able available through the Bureau of Developmental Services until after the individual is 21 years of age.

- _____ Connect with the local Area Agency if you have not done this yet. (page 3)
 - _____ Complete a Vocational Evaluation through the school system.
 - _____ Begin a resume and update it as needed.
 - _____ Obtain letters of recommendation.
 - _____ Apply to Division Of Adult Learning & Rehabilitation (Voc Rehab) for assistance with vocational planning and support.
 - _____ Obtain a non-driver's ID and discuss driver's education if appropriate.
 - _____ Apply for Social Security and Medicaid benefits at age 18. (pages 19-20)
 - _____ Register for Selective Service at 18 (males only).
 - _____ Work with the Area Agency to develop several support plans to meet anticipated specific support needs.
 - _____ Discuss with the Area Agency the role of future team members and the process of obtaining adult services.
 - _____ Create a final, specific transition plan. (page 10)
 - _____ Ask team to create information sheets covering what would be helpful for the new team to know. (what worked well, what to avoid).
 - _____ Complete any applications for post secondary education programs.
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Things to Consider

Things to consider during high school years certainly vary from student to student. Some fairly generic, (but just as important!) ones are mentioned here:

- Special Education students are eligible for individualized services up to age 21. Schools have the flexibility of extending this support or terminating it at graduation. Find out what your school's policy is and decide if it fits your support needs
- Establish the link between the IEP/transition goals and the required curriculum needed for graduation.
- Set priorities of what you want to learn.
- Maximize your education potential – What can be taught/reinforced/practiced at home?
- Simplify goals – Only write as many as can be consistently worked on and measured.
- Choose what school goals you will carry over at home, and what home goals can be carried over at school.

Education

Although free public education ends at age 21 (or graduation), the concept of being “Learners for Life” applies to everyone, regardless of disability. Identifying the most important skills and generalizing them into all aspects of life will increase your chances of success. Select courses that will assist you in reaching your goal.

Independent Living

These are things most of us primarily learned at home and had reinforced at school and in our community. Identify skills that are most important and focus on them at school as well as at home. Don't try to focus on too many at once. Slow, careful learning will yield better results in the long run. Discuss living arrangements and options in your community.

Training and Employment

Some say work as soon as possible, others say you have the rest of your life after high school to work. Often a balance of the two has proven successful. Work ethics and work experience are essential. These ethics are taught from first grade: finish projects/homework on time, work cooperatively, be neat and clean, be honest and prompt, and always try your best. Employers are looking for skilled workers that can be trusted and have earned respect. You do not need to be at a worksite to gain work experience to learn these skills. Find out what vocational training options are available through your school. In your last couple of years in school, focusing on interests and required skills is a great way to transfer and reinforce work ethics.

Community Experience

This is often overlooked as an educational goal, but your ability to present yourself affects opportunities and people's perceptions of you. Many people make friends or secure jobs or assistance because of their positive social skills, often not because of any other skill they may possess. Immersing students in social opportunities and taking advantage of teachable moments is one of the best ways to integrate new skills. This cannot be done in isolation, but must be experienced through real life events. Again, there are a variety of environments in which this can and should occur in order to assure a well-rounded background.

Transition Services and IDEIA

The Individuals with Disabilities Education Act (IDEA) (formerly called the Education for all Handicapped Children Act of 1975) requires public schools to make available to all eligible children with disabilities a free appropriate public education in the least restrictive environment appropriate to their individual needs. The reauthorization of IDEA resulted in The Individuals with Disabilities Education Improvement Act (IDEIA) of 2004.

IDEIA defines the term “transition services” as “a coordinated set of activities for a child with a disability that—

(A) is designed to be within a results-oriented process, that is focused on improving the academic and functional achievement of the child with a disability to facilitate the child’s movement from school to post-school activities, including post-secondary education, vocational education, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation;

(B) is based on the individual child’s needs, taking into account the child’s strengths, preferences, and interests; and

(C) includes instruction, related services, community experiences, the development of employment and other post-school adult living objectives, and when appropriate, acquisition of daily living skills and functional vocational evaluation.”

IDEIA requires that “beginning not later than the first IEP to be in effect when the child is 16, and updated annually thereafter – appropriate measurable postsecondary goals based upon age appropriate transition assessments related to training, education, employment, and where appropriate, independent living skills” and “the transition services (including courses of study) needed to assist the child in reaching those goals.”

Prior to graduation or turning 21, a reevaluation need not be conducted. If requested the LEA must provide the child with a summary of the child’s academic achievement and functional performance, including recommendations on how to assist him/her in meeting post-secondary goals.

The Transition Process is designed to:

- Help students and families think about their life after high school, and identify long-range goals.
- Design the high school experience to ensure that students gain the skills and connections they need to achieve these goals.
- Coordinate services to local school districts to assist in the process.
- Promote movement from school to post school activities; including (but not limited to) post secondary education, vocational training and employment, and/or adult services.

Transition Plan Basics

Transition planning begins with thinking about the future. The purpose of a transition plan is to insure that students with disabilities graduate with the skills they will need to live and work in their communities. Parents and students are asked to think about future plans. The goals of the student and those of the parent for the student are incorporated into the plan.

- Consider at age 14, adding a statement of the student's course of study to the IEP.
- All IEP's must include a transition plan from age 16 until graduation.
- The transition plan should include all areas of a student's life: educational, training & employment, independent living, community experience, social/recreational and residential, financial and legal information as needed.
- The best plan should include responsibilities for all team members. The team should include the student, parents, teachers and other agencies such as the Area Agency, Division of Adult Learning and Rehab (Voc Rehab) Mental Health and other specialty areas as needed.
- The plan is best done prior to the IEP meeting. This will facilitate the brainstorming process and make the IEP meeting more effective.

Planning tools to help you get started include:

MAPS – Making Action Plans

PATH – Planning Alternative Tomorrows with Hope

- Ask your school case manager or area agency contact about these tools or other available planning tools.

REMEMBER!

This is your future! Do not be intimidated or rushed by professionals with tight schedules. You have the right to request a meeting at any time you feel it is necessary. Be sure to request adequate time to get the work done.

You will find a sample transition plan in appendix A.

Defining Roles and Responsibilities for Transition Service Teams

The goal of transition is meaningful paid employment and successful community participation for young adults with disabilities.

Team Member	Team Members Role	Intended Outcome
Student	<ul style="list-style-type: none"> Participate in developing vision for future Inform others regarding preferences and interests Participates in IEP development Follows through with IEP Self-Advocacy 	<p style="text-align: center;"><i>MEANINGFUL EMPLOYMENT AND COMMUNITY PARTICIPATION</i></p>
Family and Guardian	<ul style="list-style-type: none"> Provide information on family & community job opportunities Actively participate in selection of IEP goals Advocate for full community integration Access other support systems (e.g. benefits, guardianship, etc.) Provide & support opportunities for student to develop work, independent living, recreational & leisure skills 	
Division of Adult Learning and Rehabilitation (Voc Rehab)	<ul style="list-style-type: none"> Suggest courses with student as it relates to their vocational goal Recommend work based learning experiences when appropriate Assist students and families by providing advocacy, information and referral to community services Support parents, student & school through the transition planning process that will lead to employment Assist student to identify their interests, skills and support needs as the relate to employment 	
Vocational Education Services	<ul style="list-style-type: none"> Locate vocational training sites Provide specific vocational skill training Assist in collection and analysis of vocational evaluation data 	
Developmental Disability & Family Support Services	<ul style="list-style-type: none"> Provide input on local support services Provide information on medical & Social Security benefits Provide in-service & community education Provide resources for counseling, advocacy & follow-along support services 	
Special Education Services	<ul style="list-style-type: none"> Provide comprehensive vocational, domestic, leisure/recreation and community functioning training in the community Coordinate the collection and analysis of evaluation data Coordinate transition planning services Provide in-service and community education 	

Remember, your team can also include an employer or other community members that can offer ideas that will help the team achieve the intended outcome.

Graduation and Diploma Issues

What does it mean to graduate from high school?

What kind of diploma will you receive?

At what age will you graduate from high school?

According to federal regulatory statutes and New Hampshire Rules, students with disabilities are eligible to receive services until they reach the age of 21 or have acquired a high school diploma. In awarding a diploma high schools must meet standards prescribed by the State Board of Education. The school board, not the individual high school, awards diplomas. It is the school board's responsibility to ensure that state and local requirements are met for the awarding of diplomas.

“The awarding of a regular high school diploma is based on the successful completion of a regular secondary education program that reflects the acquisition of knowledge and skills. In all educational settings the specialized instruction, supports and services must be provided to enable students with disabilities a genuine opportunity to meet the same expectations as those required for children without disabilities. The awarding of a “Special Education,” IEP or otherwise “differentiated diploma” does not end a student’s eligibility for special education/related services or the genuine opportunity to earn a ‘regular high school diploma.’” (Taken from memo #21 from the Bureau of Special Education FY '01.)

Be sure to talk with your school team about the type of diploma to be awarded and when you will participate in graduation ceremonies. Remember, a student may still be eligible for school services if the student is under the age of 21, even if he or she has participated in graduation ceremonies.

Accommodations or Modifications

Accommodation and modifications are frequently used to create individualized educational services. A modified program changes the standards or expectations for a course of study while an accommodation meets the student's needs without altering the caliber of instruction. The type of program you participate in could affect your graduation from high school and determine your ability to meet admission requirements for post-secondary programs.

Make sure you understand your school district's policies for graduation and diplomas!



Preparing for Employment

Preparation for the world of work begins at birth for everyone. By gradually learning independence, people are exposed to skills that will be needed in adulthood. Obviously, some need more practice than others to master certain skills, and some may need additional supports to insure success in a job. It is very important to continually work on gaining new skills that will lead to increased independence.

Listed below are some ways to prepare for the world of work:

- Develop a long-term plan covering educational, vocational, social and independent living skills that will be needed upon graduation.
- Be sure the IEP addresses employment and training activities in real situations.
- Discuss adult living options available and develop a plan for increasing independence. A plan for support should also be started.
- Make sure the IEP has a transition plan in place by age 16. Invite your Division of Adult Learning & Rehabilitation (Voc Rehab) Counselor and your Area Agency representative to assist in this plan.
- Encourage participation in a variety of community activities to increase your circle of friends and acquaintances.
- Talk to friends and neighbors about your plans, especially around work. Often first jobs are found through a friend or acquaintance.
- Work with your school to find work opportunities during the summer, on weekends or after school. Keep track of the supports needed for success.
- Begin financial planning for adulthood by applying for SSI, Medicaid and APTD

Post-Secondary Educational Options

In keeping with the concept of being “Learners for Life,” this is an area an individual may choose to consider; whether it be traditional college, technical school, internship, on the job training or independent living skills training.

It has been said that the best preparation for a successful adult life is a supportive and inclusive high school experience. Many of the barriers to college, such as the lack of a standard high school diploma, low academic achievement expectations, or insufficient exposure to assistive technology, can be overcome while a student is still in high school. Consistent advocacy on the parent’s and the student’s part is essential for this to occur. Take as active a role as possible in all planning meetings. Learning how to advocate for one’s self is a very important lifelong skill.

Post-secondary schools (and work places) are not mandated by law to automatically provide any supports necessary for a person to be successful. In college, no services are provided unless a request from that student is made to the Support Services office. **It is up to the student to assure that the supports are in place and working properly.** Remember, there is no “case manager” assigned to check up on things for you. Requesting a service does not mean it has to be provided. Both the service and its cost must be considered reasonable by the college. Colleges will make accommodations, not modifications, as modifications change the actual content of the course.

The documentation that will be required in order to be found eligible for disability support services at the college level are:

- Testing, at a minimum, should look at aptitude, achievement, and information processing. Test scores, dates and interpretation of results must be included. Testing must be three years old or less.
- Recommendations for accommodations will be considered when they are based on evidence of a substantial limitation to learning, supported by test data and/or clinical observation.
- A diagnostic interview should be included to describe present learning problem, confirm history of disability and rule out other medical basis for current limitations.

When any young adult thinks about going to college, there are many factors to consider: location, courses, living needs, size, cost and available supports. Some of the resources to explore in creating your supports include: high school, area agency, the Division of Adult Learning & Rehabilitation (Voc Rehab), natural supports, the college and, of course, your family.

Planning for the future can help a student articulate what they want out of life and begin to formulate how to get it. Whether it is a career goal, social connections, or learning for its own sake, planning helps students make informed decisions and set goals. Students who are successful have collaborated with others, and coordinated necessary supports between and among the services.

The following pages include information regarding benefits that you may qualify for, why they may be important and how to apply for them:

Medical Benefits:*

Medicare

Medicare is a federal health insurance program administered by the Social Security Administration. A person becomes eligible for Medicare at age 65, or by receiving Social Security Disability Insurance (SSDI) or Childhood Disability Benefits (CDB). However, a disabled recipient must wait for two years after SSDI or CDB cash payments begin before the Medicare coverage begins.

Part “A” of Medicare coverage is at no cost and covers hospitalization and related costs. Part “B” includes a monthly premium and covers physician’s charges, therapies, outpatient visits and some equipment. Medicare does not cover such things as routine physical exams, prescription drugs, eyeglasses and hearing aids.

If a recipient loses SSDI payments because his or her earnings have increased above the set limits, it is still possible to “buy into” the Medicare program so as not to lose medical benefits.

For more information, contact your local office or call the HCFA QMB office at 1-800-MEDICARE (800-633-4227)

Medicaid

Most Medicaid programs are based on a family’s or an individual’s income and resources. Disability is not always a requirement.

Medicaid will cover more than just medical related services and can be used to pay for such services as respite, case management, rehabilitation and personal care.

Those adults between the ages of 18 and 21 who are still in school (as well as children under 18) may have certain services in their school district paid for by Medicaid.

It is crucial to investigate the impact of increased income on Medicaid eligibility before securing a job. Medicaid pays for services not often covered under private insurance. Additionally, many people with disabilities work part time and are not eligible for health insurance coverage through their employer. The loss of Medicaid coverage can have serious implications.

A person found eligible for Medicaid coverage is issued a permanent plastic card. Since Medicaid eligibility is based on a person’s monthly income, a person could lose eligibility in one month and regain it the next. The status of a person’s income level is reviewed periodically.

***Taken from NH Challenge, summer 2003**

Home Care for Children with Severe Disabilities (HC-CSD)

Medicaid was originally designed to benefit children with and without disabilities in very low-income families. A family's income is still the primary criterion for eligibility in most of the Medicaid programs in New Hampshire.

However, a change in the Federal rules for Medicaid has allowed families caring for a child with severe disability to enroll that child in the program regardless of the family's income.

The Home Care for Children with Severe Disabilities (HC-CSD) program (also known as the Katie Beckett Option) came about because of one family's experience. When applying for the Katie Beckett waiver, collect as much current information as possible; physicians' reports, school testing, current IEP, and any evaluations done outside the school. By submitting that information with the application, you help speed up the process of determining eligibility.

Cash Benefits:*

Social Security Disability Insurance (SSDI)

Social Security is a federal insurance program. You pay taxes into a trust fund during your working years, and you, and members of your family, receive monthly benefits when you retire or become disabled. Social Security then, is based on a worker paying into the system before benefits can be received.

There are three categories of Social Security Benefits; Retirement, Survivor and Disability. Each of these categories has family benefits, which are available to spouses and/or children. We will be concentrating on the Disability category, which is known as Social Security Disability Insurance, or SSDI.

Once a worker becomes eligible for SSDI benefits his or her family members may also be eligible, based on the record of the former wage earner. For instance, the worker's spouse is eligible if he or she is 62 or older, or at any age if he or she is caring for a child under 16, or a child of any age who is disabled.

Children receive SSDI dependent's benefits up to the age of 18. However, a child with a disability may continue to receive SSDI-Childhood Disability Benefits (CDB) as long as that child remains disabled (according the Social Security definition of a disability).

*** Taken from NH Challenge, summer 2003**

Supplemental Security Income (SSI)

SSI, however, is not paid through the Social Security Trust fund, but through general revenues. So benefits are not based on paying into the system first.

SSI is designed for people with disabilities and people 65 and older who meet certain financial criteria. The amount of a person's monthly check is based on his or her income, which includes such things as SSDI, wages and Veteran's Administration (VA) benefits.

For children, the family's income level is used to determine eligibility, based on the number of people in the family. For adults (18 and over) the individual's income level is used.

Supplemental Security Income (SSI) is another federal benefit program that provides monthly cash payment.

Aid to the Permanently and Totally Disabled (APTD)

This is a state program that awards cash payments twice a month to those individuals who are eligible. To be eligible, a person must be disabled according to the state's definition of disability.

A person may work, but must meet the "substantial gainful employment" criteria. In addition, where formerly a person's disability had to have been permanent and total, now the definitions requires that a person's disability condition be expected to last for at least four years.

Eligibility is also based on income level and resources. Monthly payments can be small and may discourage people from applying; however, there is a major incentive to applying for this benefit. Eligibility for APTD automatically makes you eligible for Medicaid, and potentially eligible for Food Stamps.

Aid to the Needy Blind (ANB)

This is a state program, which provides cash payments twice a month for eligible applicants. Eligibility for ANB is not based on ability to work, or parent's income. The eligibility criterion for this program is the diagnosis of blindness, according to the state's definition. There is no age criterion.

The income criteria are the same as APTD. Like APTD, this benefit is for people who have limited income and assets. Once eligibility for this benefit is established, the applicant is automatically eligible for Medicaid and potentially eligible for Food Stamps, as with APTD. And similar to Social Security, recipients can "work themselves off" this benefit.

*** Taken from NH Challenge, summer 2003**

Why Should Individuals with Developmental Disabilities Apply for Medicaid?

Medicaid is a joint program between the Federal and State governments to fund health and social services for people who have disabilities, who are elderly or who have modest incomes. In New Hampshire, individuals can receive Medicaid funded services for their developmental disabilities, as well as services for their health care.

If you are seeking services from one of New Hampshire's area agencies and are not on Medicaid, you will be asked to consider applying for Medicaid. (Please note that all Medicaid applications are voluntary and you are not required to have Medicaid to receive services from area agencies.) This request by the area agency is made in order to combine the available State funds with Federal funds. In some cases, the area agency may not have sufficient State funds to meet your and your family's needs; however, under Medicaid combining the State and Federal funds increases the agency's capacity to meet those needs. This matching of Federal and state funds through Medicaid enables the area agency to:

1. Secure funding for the services that you and your family need (If, for example, your services are projected to cost \$4,000 and there is only \$2,000 of State funds available, under Medicaid those \$2,000 State funds can be matched with Federal funds to generate the entire \$4,000 to address all of your needs rather than half.); and
2. double New Hampshire's capacity to assist more individuals and their families (For example, \$4,000 of State funds can be combined with Federal funds to create \$8,000 to serve two people whose service costs add up to \$4,000.)

Thousands of New Hampshire individuals and their families have enrolled in Medicaid in order to receive services for their developmental disability and health care related needs. Their participation in Medicaid has enabled the State to provide more services to more people.

If you have questions regarding Medicaid, please feel free to talk to the area agency staff. They will be happy to answer your questions and help you with the Medicaid application process. You may also call the Division of Developmental Services at 1-800-852-3345 regarding any Medicaid related questions pertaining to developmental services. You may also call the Division of Human Services at 1-800-852-3345 extension 4238 for Client Services to access information related to eligibility for Medicaid or financial benefits.

Above information taken from a document dated 1999 from the Department of Health and Human Services Office of Family Services.

Applying for Medicaid/APTD

When you turn 18, Medicaid considers you to be an adult, and you are eligible for Medicaid for Adults. If you are currently receiving Medicaid (Healthy Kids Gold or “Katie Beckett” – HCCSD) they will continue to cover you until you turn 19 years old, as long as you are still in high school. You will want to apply right after your 18th birthday. (If you apply before turning 18, your parents’ income and resources will be considered.)

I have private insurance, so why should I apply? Medicaid is the funding source for the services provided by the Area Agency. Medicaid will also be billed after your private insurance for regular medical expenses and may cover co-pays and deductibles.

APTD (Aid to the Permanently and Totally Disabled) provides cash twice a month in the form of an EBT card (Electronic Benefits Transfer card). Eligibility for APTD automatically determines eligibility for adult Medicaid. To be eligible for Medicaid or APTD, you must also apply for any Social Security benefits that you may be entitled to.

Apply in person for Medicaid/APTD at your local Division of Health and Human Services office. You will need to wait for an appointment. When you apply, bring the following items with you:

- Birth Certificate
- Social Security Card
- Current bank account information (Your liquid assets need to be under \$2,500. Since you are applying as an adult, your parents’ assets are no longer counted)
- Any insurance cards
- Information on any income - SSI, pay stubs, child support, etc. (Your gross income needs to be under \$566/month. Since you are applying as an adult, your parents’ income is no longer counted)
- Proof of Disability (IEP, psychological evaluation, Vocational Rehabilitation Records, medical records)
- Any completed forms
- A receipt from Social Security showing you have completed an application for SSI

At your appointment, you will receive a sheet listing anything that is needed to complete your application. Anything left undone after 10 calendar days will close your case and you will need to apply again.

If you are disabled but are not eligible for Medicaid because you earn too much money or have too many resources, you can receive Medicaid through other programs. Ask about “Medicaid In and Out” and MEAD – Medicaid for Employed Adults with Disabilities. If you think that you may not qualify, contact a benefits planning specialist.

Once the application is complete, the local office sends it to the state office in Concord. The state office has 90 days to process the application and make a determination. If you have not had a response from them within 90 days, you can call the Office of Medical Services – Client Services Division at 1-800-852-3345 x4344. If you are denied, contact your Area Agency.

Note: Financial amounts listed above are as of 2004

Applying for SSI

The information is written specifically for people who are 18 years old or older and single.

What is SSI?

Supplementary Security Income (SSI) is a federal income support program administered by the Social Security Administration (SSA). It provides monthly cash assistance to persons who have disabilities, limited income and limited resources to help them meet their basic needs for food, clothing and shelter.

The disability must be a medically determined mental/physical condition that is expected to last for a year or longer, and prevents you from being substantially gainfully employed. The financial criteria include earned income (wages) at or below \$800 gross per month and resource assets under \$2,000. Resource assets include bank accounts and other fluid assets. Your home and car (if used for medical appointments or work) are not included.

How do I apply?

Your first step is to call 1-800-772-1213 between 7:00 a.m. and 7:00 p.m. Monday through Friday to schedule either a phone or in person appointment at the local SSA office. If you are deaf or hard-of-hearing you can call the TTY# 1-800-325-0778. A taped message will ask you to make a selection. You may stay on the line without making a selection and a representative will eventually come on the line. You will be asked to give your name, address and social security number.

The date of your call will be used as your application date. If you are found eligible, benefits are retroactive to the first day of the month following your application date. It is to your advantage to call for an appointment right after your 18th birthday. If you are asked about the parent's income, it is because the computers use the first day of the month (possibly before your 18th birthday) in determining what information to look for. Tell them you do not want to apply for the month you turned 18, but for the next month.

After the phone call, an application packet is generally mailed to you. You can complete it before your appointment, or complete it at your appointment with the assistance of the SSA representative.

The following documentation will help make the application process more effective.

- Social Security Card and Birth Certificate (or other proof of age)
- Paycheck stubs or copies of payments received including child support that you are currently receiving (proof of income)
- Bank account statements, life insurance policies, record of cash kept (proof of resources)
- Rent/mortgage payments (proof of living arrangements)
- Names, addresses and telephone numbers of doctors, hospitals and clinics
- Information from teachers, the Division of Adult Learning & Rehabilitation (Voc Rehab) or employers to show work limitations due to disability (concentration, strength, endurance, persistence and pace, tolerating stress, etc.)
- Individual Educational Plans (IEP), psychological evaluations, vocational evaluations
- Documents showing medical history, proof of disability

You can have someone (family member/friend/advocate) go with you to the appointment. You can also have a representative to act in your place. (Form SSA-1696) The appointment generally

takes about an hour. Be prepared to wait even if you have an appointment. Remember, this is also your time to ask questions.

Once your application is complete and they determine that you are financially eligible (gross income less than \$800/mo and resources less than \$2,000), your application will be sent to the Disability Determination Service (DDS) in Concord. This is where your records will be evaluated to determine if you are eligible based on your disability. If they cannot make a determination based on the records available, they will pay for an examination. DDS operates under the Department of Education (DOE) and NH Division of Adult Learning & Rehabilitation (Voc Rehab). For this reason, correspondences may be on DOE letterhead.

If I'm eligible, what else do I need to know?

Payments are based on your living situation. If you live alone and have no income, then you will receive the maximum SSI benefit of \$552 a month. You can also receive the maximum benefit if you are living with someone else and paying your fair share. Fair share is the total household expense divided by the number of people (related or not) living in the house. Household expenses include rent or mortgage, heat, lights, taxes, water/sewer and food. Average monthly expenses calculation is used. For example heating cost is determined by the total yearly cost of heating divided by 12.

If you are not paying rent or paying your fair share toward the living expenses at home, Social Security will deduct \$204 from your SSI check for in kind support (the support your family is giving you). If your fair share is more than \$552 (the max SSI monthly payment) then you are deemed unable to pay for your fair share. If this is the case then your APDT will give you the difference between your SSI check and the standard of need (currently \$566/month). If you have no income when you apply and are living with someone else, your check will automatically be reduced by the \$204. As soon as you have enough to pay your fair share, you must contact your Social Security representative.

A representative payee is a person, agency or organization that manages your benefits if you are unable to do so yourself. If you have a doctor's letter stating either you need a representative payee or that you are able to manage your own money, the process of determining if a representative payee is necessary is a lot smoother.

For more information go to the Social Security Administration's website at www.ssa.gov.

If you are denied but believe that you are eligible, ask your SSA representative for information on how to appeal.

NOTE: All the financial figures listed above are as of 2004

The New Hampshire Future Planning Guide*

The idea for the *New Hampshire Future Planning Guide* came from many individuals: consumers, parents, professionals, and community members. While other guides are available to assist with future planning, none were specific to New Hampshire's laws and services for people with disabilities and those who support them.

The *Guide* is divided into two volumes. *Volume 1: Life Planning for a Person with a Disability* will help you develop a *life plan* and a *letter of intent*. They can be used to share information, dreams, and aspirations for a person with a disability. While not a legal document, the *letter of intent* can accompany legal documents, such as a will or trust, and communicates important information about the person. Developing a *life plan* or *letter of intent* sounds easy but many details can be overlooked without tools and lists to refer to. The *Guide* provides you with tools and lists to aid in planning.

Volume 2: Legal and Financial Planning for a Person with a Disability offers legal and financial information to assist you with legal and financial planning. It explains why planning is so important and provides valuable information about guardianship, public benefits consideration, special-needs trusts, and health care coverage. While not a replacement for the services of a financial planner or attorney, it will assist you to develop the proper legal and financial planning to support the vision outlined in your life plan.

The *Guide* has been designed to use in a variety of situations and at any point in a person's life. Younger parents, extended family members, aging caregivers, professionals, and others providing support will discover that the information included in the *Guide* is helpful when developing a future plan.

*Taken from the Preface of *The New Hampshire Future Planning Guide*

A copy of *The New Hampshire Future Planning Guide* can be obtained from your Area Agency or from CSNI at 603-229-1982. It can be downloaded from the CSNI website at www.csni.org.

Guardianship

When a person turns 18, they obtain all the legal rights of adulthood. When the court appoints a guardian, specific rights are transferred to the guardian. Parental rights and guardian rights are different issues. Guardianship should be considered necessary only when it is the least restrictive option and all other alternatives have been explored.

ALL GUARDIANS ARE RESPONSIBLE TO:

- Act on behalf of the individual to secure services and supports.
- File court reports on behalf of the individual.
- Act as part of a team in determining individual support needs and services.
- Apply for services, entitlements, and supports on behalf of the individual.
- Treat the individual with dignity & respect, regardless of the individual's level of ability
- Advocate for the best interests of their ward.
- May be responsible for specialized options deemed necessary by the court.

The Division of Behavioral Health/Developmental Services, Client & Legal Services developed A Handbook for Guardians to provide an understanding of the legal requirements for appointment of a guardian. It also explains the role and duties of guardians. A copy can be obtained by contacting the Division of Behavioral Health/Developmental Services, Client & Legal Services at (603) 271-5000 or through your Area Agency.

UNLESS SPECIFIED IN THE GUARDIANSHIP DECREE, NO GUARDIAN HAS THE RIGHT TO:

- Choose friends
- Choose personal clothing styles, hairstyles, etc.
- Decide how a person spends personal free time and money
- Limit or censor mail
- Prevent the individual from having visitors or having confidential correspondence
- Choose social activities
- Speak on behalf of the individual if they are able to speak for themselves
- Prevent the individual from being involved in intimate relationships

THE GUARDIANSHIP DECREE WILL SPECIFY THE PARTICULAR POWERS A GUARDIAN MAY POSSESS.

- Guardianship should only be sought when impaired judgment poses a major threat to a person's welfare.
- Guardianship is not intended to protect a person from normal daily risks.
- A Guardian should not be appointed simply because a person shows poor judgment or has trouble sticking to a decision
- Guardianship may include guardianship over the person, the estate or both

Guardianship *continued*

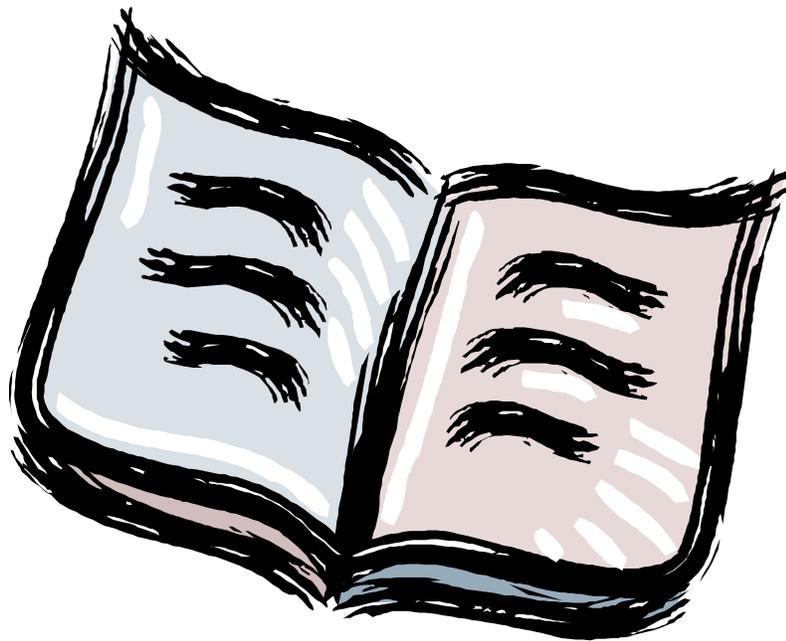
OTHER LESS RESTRICTIVE OPTIONS:

- Having no guardian (a right of all persons)
- Temporary Emergency Guardianship (60 days)
- Mentorship
- Advisor or Advocate
- Power of Attorney for Financial and/or Medical
- Conservator over estate
- Representative Payee
- Authorized Representative

Unless the court has issued a guardianship decree, the individual retains all the rights of a legal adult.

FOR MORE INFORMATION YOU MAY CONTACT:

- Your Local Area Agency
- Division of Behavioral Health/Developmental Services, Client & Legal Services (603) 271-5000
- Disability Rights Center, Inc. (603) 228-0432 or 800-644-5393
- New Hampshire Legal Assistance (603) 644-5393
- Your local Probate Court
- Your own attorney
- Mentorship, Inc. 226-4470



Community Resources

School System

State Department of Education 603-271-3741
Local schools
SAU Office for your school district
 Special Education director
 Superintendent of Schools
 School Board members

Family Support – Associated with local area agency

Coordinator, Advocates or Director
Service Coordinators
Local Family Support Council

Statewide Agencies and Organizations

Brain Injury Association of NH 800-773-8400
Client and Legal Services – State of NH 800-852-3345
Disability Rights Center 800-834-1721
State Developmental Disabilities Council 800-852-3345 x3236
Family Support Council – State 800-852-3345 x5019
Granite State Independent Living 800-826-3700
Home of Your Own (NH Housing Finance Authority) 800-432-4110
Institute on Disability 603-862-4320
Parent Information Center 800-232-0986
Social Security Administration 800-772-1213
Division of Adult Learning and Rehabilitation (Voc Rehab) 800-299-1647
Service Link
Governors Commission on Disability
People 1st of NH
Parent to Parent 800-698-LINK

Health Care Related Resources

NH Medication Bridge Program: to access free/reduced cost prescription medications directly from pharmaceutical companies. Individuals must be within 200% of federal poverty level and not have prescription insurance. Contact:

 Governor's Customer Service line 1-800-852-3456
Dental Assistance
 NH Donated Dental Assistance 603- 223-1531
 Medicaid information 1-800-852-3345x4344 or 8069
 NH Help Line 1-800-852-3388 or 603-225-9000

Internet Resources

Brain Injury Association of NH.....	www.bianh.org
Division of Adult Learning & Rehab (Voc Rehab).....	www.ed.state.nh.us/VR
Governor's Customer Service Line	www.healthynh.com
National Center on Secondary Education.....	www.ncset.org
Granite State Independent Living.....	www.gsil.org
Community Support Network, Inc. (Area Agency information).....	www.csni.org
Parent to Parent.....	www.p2pnh.org

For more information about benefits, please see the following resources:

Social Security Administration:.....	www.ssa.gov
NH Department of Health and Human Services:.....	www.dhhs.state.nh.us
Office of Medical Services – client services division –	1-800-852-3345 x4344
New Hampshire Challenge (summer 2003 issue).....	www.nhchallenge.org
Granite State Independent Living (Ask for a benefits specialist).....	1-800-826-3700

Transition Related Websites

Transition for Students with Learning Disabilities.....	www.Ldonline.org/ldindepth/transition/transition
Transition Research	www.ed.uiuc.edu/SPED/tri/institute.html
Listing of Related Transition Sites	www.ed.uiuc.edu/SPED/tri/internetsites.html
Transition Information.....	www.fulllifeahead.org
National Information Center for Children & Youth with Disabilities	www.nichcy.org
Parent Advocacy Coalition for Educational Rights	www.pacer.org
Financial Aid for Post Secondary Education.....	www.finaid.org
IDEA 97	www.ed.gov/offices/OSERS/IDEA
IDEA 2004.....	www.wrightslaw.com/idea/index.htm
IDEA information	www.ideapractices.org
.....	www.kidstogether.org/idea.html
Kids Together (Inclusion).....	www.kidstogether.org
New Hampshire Challenge Newsletter	www.nhchallenge.org
Information on Colleges	
Financial Aid / Career Choices & More	www.peterson.com
Medicaid Information	www.kff.org
Granite State Independent Living.....	www.gsil.org
National Center on Secondary Education.....	www.ncset.org
Division of Adult Learning & Rehab (Voc Rehab)	
.....	www.ed.state.nh.us/VR
Job Accommodation Network (JAN)	">www.icicoled.umn.edu/all/>
Information on SSA work incentives.....	www.onestops.info/article.php?article_id=177#1
Research and Training on Independent Living.....	">www.ukans.edu/rteil>
Workforce Skills Center	">www.scans.jhu.edu>
Secretary's Commission on Achieving Necessary Skills	wdr.doleta.gov/SCANS/

Legislative Advocacy

“Waiting List” “Funding” “Services” “Legislature”

Most likely, as the end of the high school years approach, you’ve heard these words. Will adult services be available? There is no guarantee. Education up to age 21 or until a high school diploma is awarded is an entitled service. After graduation or turning age 21, **services are no longer guaranteed or mandated.**

How does the waiting list work?

Each Area Agency designs an annual operating budget that supports existing services primarily based on funds allocated by the Bureau of Developmental Services, which gets its budget from the state legislators and the governor. When an individual needs new services, a proposal is made for additional funds to support those services. If there are no funds available within the annual Area Agency operating budget or if the Bureau of Developmental Services has no additional funding to allocate to the newly identified needs, an individual is placed on a waiting list.

There are two priorities to the waiting list that are reported to the Bureau of Developmental Services.

Priority One: Any individual whose needs exist currently, or will exist within one year, and whose needs place them at risk of substantial physical or emotional harm, or significant regression.

Priority Two: Any individual whose needs will exist within one to two years, and will (at that time), place them at risk of physical or emotional harm or significant regression.

It is important to remember that priority is based on need, and not on how long an individual has been on the list.

What can you do to advocate?

- Make sure your Area Agency is aware in advance of graduation plans, and is an active part of the school transition planning team.
- Make sure your Area Agency is aware of your projected needs.
- Provide your Area Agency with the most recent evaluations.
- Advocate with your state representative to the legislature.
- Advocate staying in school until you have completed a transition plan that prepares you for adult life.

Here are some suggestions for advocating for funding for services.

- Find out what the status of your Area Agency’s Wait List is.
- Contact your local representative to the legislature.
 - Inform the representative of anticipated needs and what will happen if funding is not available to provide services.
 - Ask your legislator to support funding the waiting list.
 - Attend hearings whenever possible.
- Ask your Area Agency’s representative to inform you of any legislative action steps, i.e. citizens testifying at hearings or meeting together around the waiting list issue.

If unsure who your legislator is, contact your Area Agency representative or if you have access to a computer check on line at <http://www.gencourt.state.nh.us/ie/whosmyleg/>.

Advocacy: Your Role, Your Challenge

This guide is meant to provide you with information to help you become a more knowledgeable and effective advocate. There are times when most of us wish for someone else to assume this leadership role, if even for a short time, as it can become overwhelming. It is important to remember that you don't have to be alone in this process. There are resources available to help you navigate this process. Take the time to check out the resources in this guide. Seek out advisors who can assist you in creating a vision and a workable plan to achieve the vision.

For parents, your child needs you to be their greatest support, resource, and advocate, even when you don't feel like it! No one will ever oversee the affairs of your child with as much love and completeness as you. Even if you do not eventually become guardian for your adult child, your presence and input in their life will always be invaluable.

And you, as a student, need to also become a good advocate for yourself!

Whether you are a parent or a student, advocacy can be a challenge. You may have obstacles to overcome, but you will also have successes to celebrate. You will find, in the end though, that it is a very rewarding job. Ultimately, you have two basic choices: jump in and do it, making sure something good happens, or sit on the sidelines and just hope something good happens.

There are advocacy groups around the state, and a statewide group, People 1st of NH. Check the resource page for more information.

May you bring strength and commitment to your journey!



APPENDIX A
Sample Transition Plan

SAMPLE Individual Transition Plan (ITP)

STUDENTS NAME: _____ ITP DATE _____

REVIEW DATES _____

SOCIAL SECURITY # _____ PHONE _____ DOB _____

CONTACT PERSON _____ RELATIONSHIP _____

PRIMARY DISABILITY _____ SECONDARY DISABILITY _____

DATE OF EXPECTED SPED TERMINATION _____

H.S. DIPLOMA _____ 21ST BIRTHDAY _____ OTHER _____

CASE MANAGER(S) _____

TRANSITIONAL AGENCY/CONTACT PERSON _____

ADDRESS _____ PHONE # _____

Sign In Sheet

NAME	TITLE	AGENCY
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*
_____	*	*

SAMPLE Individual Transition Plan (ITP)

1. POST SECONDARY EMPLOYMENT AND/OR EDUCATION

Long term goal statement: _____

_____ Competitive Employment	Objective _____
_____ Transitional Employment	_____
_____ Supported Employment	_____
_____ Community College/University	Evaluation Criteria: _____
_____ Technical College	_____
____ With Support ____ Without Support	Person/Agency Responsible: _____
____ Other	_____
	Expected Completion Date: _____

Objective: _____

Objective: _____

Evaluation Criteria: _____

Person/Agency Responsible: _____

Person/Agency Responsible: _____

Expected Completion Date: _____

Expected Completion Date: _____

2. POST SECONDARY LIVING ARRANGEMENTS

Long term goal statement: _____

_____ Independent Living	Objective _____
_____ With Family or Relative	_____
_____ Supervised Apartment	_____
_____ Enhanced Family Care	Evaluation Criteria: _____
_____ Individual Service Option	_____
_____ Activities of Daily Living Skills	Person/Agency Responsible: _____
_____ Section 8/Public Housing	_____
_____ College Dormitory	Expected Completion Date: _____
____ With Support ____ Without Support	

Objective: _____

Objective: _____

Evaluation Criteria: _____

Person/Agency Responsible: _____

Person/Agency Responsible: _____

Expected Completion Date: _____

Expected Completion Date: _____

SAMPLE Individual Transition Plan (ITP)

3. MEDICAL NEEDS

Long term goal statement: _____

_____ Independent-No Services Recommended Objective _____

_____ Requires Assistance _____

_____ Adaptive Equipment/Prosthetic Devices _____

List Equipment: _____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

Other: _____

Objective: _____ Objective: _____

_____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

4. RECREATION/LEISURE NEEDS

Long term goal statement: _____

_____ Independent Objective _____

_____ Family Supported _____

_____ Church Groups _____

_____ Other _____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

Objective: _____ Objective: _____

_____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

SAMPLE Individual Transition Plan (ITP)

5. COMMUNITY NEEDS

Long term goal statement: _____

_____ Independent-No Services Recommended Objective _____

_____ Needs family planning services _____

_____ Needs support group _____

_____ Needs respite care/family support Evaluation Criteria: _____

_____ Other: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

Objective: _____

Objective: _____

_____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

_____ Expected Completion Date: _____

6. PRIMARY TRANSPORTATION

Long term goal statement: _____

_____ Independent-No Services recommended Objective _____

_____ Public Transportation _____

_____ Specialized transportation _____

_____ Family transports Evaluation Criteria: _____

_____ Car pools _____

_____ Drivers license assistance Person/Agency Responsible: _____

_____ Other: _____

_____ Expected Completion Date: _____

Objective: _____

Objective: _____

_____ Evaluation Criteria: _____

_____ Person/Agency Responsible: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

_____ Expected Completion Date: _____

SAMPLE Individual Transition Plan (ITP)

7. ADVOCACY/LEGAL NEEDS

Long term goal statement: _____

_____ Independent-No Services Recommended Objective _____

_____ Case Management (Dept. of Mental Health _____

_____ & Developmental Services DMH/DS) _____

_____ Guardianship (sought/acquired/needed) Evaluation Criteria: _____

_____ Other: _____

_____ Person/Agency Responsible: _____

_____ Expected Completion Date: _____

Other: _____

Objective: _____ Objective: _____

Evaluation Criteria: _____

Person/Agency Responsible: _____

Expected Completion Date: _____

8. ADULT DAILY LIVING (ADL) SKILLS

Long term goal statement: _____

_____ Independent-No Services recommended Objective _____

_____ self-care skills _____

_____ money management skills _____

_____ Assistance in community resource use Evaluation Criteria: _____

_____ housekeeping skills _____

_____ Meal preparation skills Person/Agency Responsible: _____

_____ Other: _____

_____ Expected Completion Date: _____

Objective: _____ Objective: _____

Evaluation Criteria: _____

Person/Agency Responsible: _____

Expected Completion Date: _____ Expected Completion Date: _____

SAMPLE Individual Transition Plan (ITP)

9. FINANCIAL/INCOME NEEDS (MAY BE COMBINATION OF SOURCES)

Long term goal statement: _____

_____ Earned wages	
_____ Social Security Disability	
_____ Insurance (SSDI)	
_____ Supplemental Security Income (SSI only)	Objective _____
_____ Unearned income (gifts, family support)	_____
_____ Trusts/will	_____
_____ Food stamps	Evaluation Criteria: _____
_____ Medicare	_____
_____ Section 8/public housing	Person/Agency Responsible: _____
_____ Group insurance (Medicaid, Champus Blue Cross, etc.)	_____
_____ Other	Expected Completion Date: _____

Objective: _____

Objective: _____

Evaluation Criteria: _____

Evaluation Criteria: _____

Person/Agency Responsible: _____

Person/Agency Responsible: _____

Expected Completion Date: _____

Expected Completion Date: _____

NOTES: _____

APPENDIX B
“RFP Questions”

If funding does become available, here are some questions you might consider asking:

Prepare a written list to discuss with vendors for adult services

Once the “Requests for Proposals” have been sent to the vendors and budgets have been submitted, it is time to meet with the vendors of your choice. Whether you are requesting **Day Services**, Residential **Services**, (or both) the following are some areas you might want to consider asking vendors about when you meet:

1. How would you best explain what services your agency provides for individuals with developmental disabilities?
2. How does your agency incorporate an individual’s choice and control over how services are provided?
3. How do you involve individuals/families in the selection of support providers/staff?
4. How do you communicate and share information with a family or legal guardian?
5. When safety issues occur, how do you handle this situation? What safeguards do you regularly have in place?
6. How do you respond when an individual/family is not comfortable with their service provider/staff?

As you consider service options, here are some points you may want to discuss with your agency:

1. Describe your skills, interests, desires, and needs. Ask if the vendor has been successfully offering services to individuals with similar characteristics.
2. What job settings/day programs are currently available?
3. How do you match these settings (job or day) to an individual’s skills?
4. If an individual were unhappy with services received, how would you handle this?
5. What other activities (volunteer, recreational) in the community are currently available?
6. If you would like, ask to visit some of the sites/programs currently offered.
7. Feel free to ask any questions that will help you feel more comfortable and clear about the services provided by the vendor.
8. Describe the physical environment you are requesting (both preferred and absolutely necessary) – surrounding neighborhood; apartment vs. house; activity/noise level of environment; household membership; sharing environment with other individuals with disabilities; neighborhood – city, suburbs; apartment vs. house –size, space within; activity/noise level – busy, quiet; household membership – children/pets in home/male-female; sharing environment – number, gender: handicap accessible – rooms and

equipment; meal preparation; any area where personal assistance is needed; etc. Does the bedroom need to be on the 1st floor.

9. List what works and doesn't work for you in a living situation – chores; likes and dislikes for entertainment/recreation – TV, video games, board games, etc.; interactions – likes or doesn't like time spent alone; religious practices.
10. List preferences in provider/staff: age; experience; gender; married or single; children; language/background; personality traits you would prefer – upbeat; outgoing or quiet; reserved; interests; community involvement; habits – smoking/nonsmoking; pets
11. Are there any allergies/medical concerns?
12. When provider uses Respite, where will that take place?
13. Will communication and contacts with family and friends be encouraged and accommodated? Will individual be able to make personal telephone calls?
14. How will agency facilitate a smooth transition for individual to the residential setting and will there be any transition costs? How have transitions typically been accomplished?
15. How will individual's finances be handled? Will individual be given assistance to increase money/budgeting skills?
16. What paperwork will need to be completed prior to individual's move?

Feel free to ask to visit current residential settings and ask any questions that would help make you feel more comfortable and clear about the residential services the vendor will provide.

To help you make a good decision about which services are best for you, here are some additional strategies to use:

1. Talk to other people who have used similar services.
2. Talk to your family, teachers and other people on your educational/support team.
3. Talk to your Transition Coordinator or Resource Coordinator at your Area Agency.
4. Talk with service providers directly.

REMEMBER: Services for a person with disabilities is not simply to help a person with a disability get a job, have something to do, or have a place to live. These services are for the purpose of helping individuals:

- Reach their full potential
- Become participating community members
- Have a valued role, with the same rights and responsibilities as everyone else
- Define themselves and their place in the world

Experience and enjoy all that life has to offer!

APPENDIX C

Glossary of Estate Planning Terms*

Administrator- If an individual does not write a Will, the courts will appoint an Administrator to handle the deceased person's estate according to the laws of the state.

Advocate- An advocate is a person or institution that will serve as a friend and advocate and look out for the best interests of the disabled person. The advocate is not court appointed. In some cases where the disabled person can manage most of their own affairs, an advocate from a charitable organization may be more appropriate than legal conservator/guardian.

Beneficiary- The persons or institutions who receive the benefit of the Will, Trust, Life Insurance policy, etc.

Codicil- An amendment to a Will. The codicil is a separate document that is signed with witnesses just like the Will, but amends some portions of the Will.

Conservatorship/Guardianship- A court-ordered mandate by which an individual or institution is appointed (a) to manage the estate of the person judged incapable (not necessarily incompetent) of caring for his/her own affairs; (b) to be responsible for the care and decisions made on behalf of a person when that individual, again, is determined to be unable to care for herself/himself. A Conservator/Guardian can be appointed to serve in either one or both ways. In some states a Guardian assists the person and the Conservator assists the estate of the person.

Estate- All of the person's possessions including all properties and debts remaining at the time of death.

Estate Tax- In most states, there is no tax on estates. However, the federal government does have an estate tax for estates above a specified value.

Executor/Personal Representative- The individuals or corporations that are appointed in the Will who will have the legal responsibility for carrying out the provisions of the Will to the best of their ability according to the current laws of the land. The executor may seek the assistance of an attorney to complete the probate process.

General Conservatorship/Guardianship- This type of Conservatorship/Guardianship gives the conservator/guardian the legal rights to manage aspects of the individuals' affairs that are specified in the decree.

Heir- The person who inherits property under state law.

Income Beneficiary- This is generally, the person in the trust agreement who will receive the income from the trust during his or her lifetime.

Intervivos trust- It is a living trust. It functions during lifetime of the grantor.

Irrevocable Trust- An irrevocable trust means that the items placed in the trust cannot be taken out of the trust except by ending the trust and disbursing the items to the appropriate remainderman. This trust will have its own tax number and be taxed as a separate “person”. The Trustee is required to file an annual report.

Letter of Intent- This is one of the most important documents of an estate plan. In this very personal letter, parents will express their hopes and desires for their child with a disability’s future care. Please see the guidelines for writing a Letter of Intent.

Limited or Partial Conservatorship/Guardianship- This type of Conservatorship/Guardianship generally applies to individuals with developmental disabilities and restricts the areas in which the Conservatorship/Guardianship may act on behalf of the individual.

Minor- Any person under the age of 18 in most states. Parents have responsibility for their children until age 18 when they legally become adults. The person with a disability may not have the capacity to make informed decisions and the parents may want obtain a Conservatorship/Guardianship.

Probate- The courts proceedings in which there is supervision over the property passing from a deceased person to beneficiaries under the provisions of the Will or, if there is no Will, under the provisions of the less generous state law.

Remainderman- The persons or institutions that will receive the remainder (what is leftover) of the trust after the income beneficiary has died and the trust ends.

Revocable Trust- A revocable trust means that the items placed in the trust can be taken out of the trust. This type of trust is taxed as part of the estate of the grantors.

Special Needs Trust-(Also known as a Spendthrift, Luxury, Discretionary or Supplementary Trust) It may be created as a Living Trust during the life of the person (grantor) or as a Testamentary Trust after the death of the person (grantor). It is designed to provide for the supplementary needs of the person with the disability over and above that being given by the government. The trust funds are not to supplant or replace government programs. Once the need for basics such as food, shelter, medical care, education, etc. are met by the government, that trust can provide additional funds to enhance the quality of life. The trustees should never give more funds than would cause a loss or reduction of government benefits unless there is an emergency. The trust is not in the name of the individual. The disbursement of funds is left to the “discretion” of the trustee/successor trustee. This type of trust is not considered an asset for determining government benefits. Only those funds, which are actually disbursed directly to the individual, will count as earned or unearned income.

Successor Trustee- This person(s) takes over the responsibility of managing the trust after the death or legal incompetence of the initial trustee(s).

Testamentary Trust- This trust document will not go into effect until after the death of the person who requests it. The request is contained in the Will. Any special provisions for the trust are mentioned in the Will, but will not go into effect until after the Will has been probated. The normal probate period is usually 6 months to 6 years, so the trust will not be funded until that time.

Trust- A legal entity established either by written agreement signed during the life of the person or by a Will. The trust is governed by the terms in the written document.

Trust Corpus- The property (and funds) held in the trust. It is also called the trust estate.

Trustee- This person(s) manages the trust. There is a fiduciary responsibility for seeing that the funds are properly invested and disbursed according to the wishes of the Trustor and the laws of the state. The grantor and initial trustee may be the same person.

Trustor- Also known as a “Grantor” or “Settlor”. This is the person(s) who set up the trust.

Will-The purpose of a Last Will and testament is to direct the distribution of the assets of the estate to all the beneficiaries. The share of the estate that is intended to go to the individual with a disability should be left to a Special Needs Trust in order to avoid impacting the benefits that they receive through the government.

**These terms have been acquired and modified from a variety of sources.*

*** To access a hard copy of NH Futures Planning Guide, contact CSNI at 603-229-1982 or it can also be downloaded from their web site, at www.csni.org*