

Interagency Transition Checklist

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Student Information Sheet

First Name _____ Last Name _____

Date of Birth _____ 18th Birthday _____ 22nd Birthday _____

Target graduation/exit date:

Postsecondary goals: Education/ Training

Postsecondary goals: Employment

Postsecondary goals: Independent Living

Current IEP Contact Sheet

Transition Checklist Overview

Age 13

Action Needed	Role of the Person Responsible	Date of Action	Follow Up/ Notes
Discuss transition at the IEP meeting before the student turns 14	Transition Coordinator or Administrator		Only complete subsequent action steps IF the student will turn 14 within the IEP year
Share resources about the transition planning process	Transition Coordinator		
Learn about the transition planning process	Parent/ Guardian		
Pre-Transition Planning Meeting	Transition Coordinator		
Parent Vision	Transition Coordinator		
Share a social story about the IEP meeting, if appropriate.	Special Educator		
Student Vision	Special Educator		
Complete Transition Planning Form (TPF)	Transition Coordinator		Fill out the TPF once transition assessments are completed
Create appropriate measurable postsecondary goals based on age-appropriate transition assessment	Transition Coordinator		These goals should be based on the transition assessments, needs interests, desired outcomes
Include transition services that will reasonably enable student to meet postsecondary goals			

Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Determine role of student in IEP meeting			
Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Attend parent workshops on transition	Parent/Guardian		
Learn about different agencies	Parent/Guardian		
Recent assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 14

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Contact family, offer to set-up meeting			Concerns & vision
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			Transportation training; financial management; extra curricular activities, support employment, volunteer opportunities
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			

Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Discuss Pre-ETS program			
Follow-up with family after IEP meeting			Provide any resources
Follow-up on Masshealth, SSI, DDS (if child applications not complete)	Parent/ Guardian		
Attend workshops, trainings	Parent/ Guardian		
Learn about different agencies	Parent/Guardian		
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 15

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team			

meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Discuss MCAS Track or portfolio track	Program Director		
Follow-up with family after IEP meeting			
Follow-up on Masshealth, SSI, DDS (if child applications not complete)	Parent/ Guardian		
Pre-ETS?			
Attend workshops, trainings	Parent/Guardian		
Learn about different agencies	Parent/Guardian		
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 16

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team			

meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Apply for services from Massachusetts Rehabilitation Commission (MRC), if appropriate			
Coordinate Work Based Learning (WBL) opportunities (Inside and outside the classroom)			
Follow-up with family after IEP meeting			
Attend workshops, trainings	Parent/ Guardian		
Consider options related to decision making such as supported decision making, guardianship, health care proxy, durable power of attorney, adult foster care, etc. (age of majority)			See Age of Majority guide for more information, try to have in place before individual turns 18
Consult a legal and/or financial professional regarding decision making options, estate and financial planning			<p>*This is a personal decision specific to each family</p> <p>Consultation to learn more information about special needs trust or other arrangements that will protect eligibility for benefits. Check the availability of the ABLE Act. ABLE allows individuals to</p>

			save up to \$100,000 and does not affect benefits.
Research Adult Family/Foster Care (AFC)			Program is funded through MassHealth and provides a tax-free stipend to a family member/caregiver living with the individual with a disability to help with care, caregiver can not be the legal guardian (may be parent who does not have guardianship, sibling over 18). Determine best support for individual AFC or PCA?
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 17

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team			DDS may wait until 18 to start attending meetings

meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			*DDS Adult intake and eligibility must occur prior to DDS representative attending the meeting
Explore supported employment or volunteer opportunities in the community as part of the student's IEP service or with MRC, if appropriate			
Follow-up with family after IEP meeting			
Discuss 688 referral			
Consider options related to decision making (age of majority)			<p>See Age of Majority guide for more information</p> <p>For the protection of the student, guardianship must be completed in a timely manner.</p> <p>*If eligible for Adult Family Care (AFC) only one parent can act as guardian only one parent can act as guardian</p>
Submit copy of the Decree of Guardianship to the Education Office	Parent/Guardian		
Prepare to apply for Social Security Income (SSI)	Parent		Can be done earlier if the young adult is in a residential

			<p>placement or if parent/guardian is considered low income.</p> <p>Wait to complete SSI when the individual is 18, so that their income is taken into consideration and not the parents.</p> <p>Link to SSI</p> <p>*Make sure the individual has less than \$2000 in assets of his or her own. Speak with a benefits officer.</p>
Prepare for MassHealth			<p>*Once the individual receives SSI as an adult, he/she is automatically eligible for Mass Health (Medicaid). If parent/guardian does not receive insurance card by mail contact MassHealth. Once individual is 19, eligibility is based on their own income.</p>
Prepare for Adult services application			<p>Once guardianship is complete, this is the time to apply for Adult Services</p> <p>Link to DDS</p> <p>*Important to remember adult services is based on eligibility, it is not an entitlement. Consider more than adult services for a full life</p>

Begin application process for adult services	Parent/Guardian		17 years and 10 months - Apply after guardianship is complete
Confirm 688 has been generated by school district	Parent/Guardian		
Attend workshops, trainings	Parent/Guardian		
Prepare information for SSI and mass health if not done so already	Parent/Guardian		
Research Adult Family/Foster Care (AFC)	Parent/Guardian		Program is funded through MassHealth and provides tax-free stipend to a family member/caregiver living with the individual with a disability to help with care, caregiver can not be the legal guardian (may be parent who does not have guardianship, sibling over 18). Determine best support for individual AFC or PCA?
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 18

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Submit copy of the Decree of Guardianship to the Education Office			
Register child to vote, if appropriate			
Contact family, offer to set-up meeting			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's			

transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Review MCAS	Program Director		
MassCap prioritization materials sent	DDS		
Record Guardianship status on IEP	Program Director		
Record 688 Status on IEP	Program Director		
Follow-up with family after IEP meeting			
Submit 688 referral to appropriate adult service agency	School District		Adult services prefers the 688 referral is submitted at 18. By law the 688 referral must be submitted 2 years before the student graduates or turns 22.
Attend workshops, trainings	Parent/ Guardian		
Apply for Non-driver ID Card, if appropriate			

Complete adult eligibility process			Apply after guardianship is completed
Determine eligibility			
Contact family	DDS Transition Service Coordinator		
Meet with family and adult agency			
Apply for Social Security Income (SSI)	Parent/ Guardian		Can be done earlier if the young adult is in a residential placement or if parent/guardian is considered low income. *Make sure the individual has less than \$2000 in assets of his or her own. Speak with a benefits officer.
Mass Health			<p>*If an individual receives SSI as an adult, he/she is automatically eligible for MassHealth (Medicaid). If a parent/guardian does not receive an insurance card by mail contact MassHealth.</p> <p>If not eligible for SSI, apply separately to the Division of Medical Assistance for MassHealth</p>
Transfer of rights			*Unless formal guardianship has taken place
Apply for section 8 housing			See Autism Housing Pathways

Research Adult Family/Foster Care (AFC)			Program is funded through MassHealth and provides tax-free stipend to a family member/caregiver living with the individual with a disability to help with care, caregiver can not be the legal guardian (may be parent who does not have guardianship, sibling over 18). Determine best support for individual AFC or PCA?
Register young adult for the draft, if male	Parent		This does not mean that the individual would actually be drafted. Failure to do so may affect some government benefits
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 19

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Transition to Transition Program?			
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			

Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Follow-up with family after IEP meeting			
Meet with family and adult agency			Craft vision for post-secondary vision, observe some examples of day programs. School will accompany family/guardians to # programs
Attend workshops, trainings	Parent		
Mass Health			
Students from states where graduation the age of transition to adult eligibility is 21 should follow steps below.			
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 20

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Parent Vision			
Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Ensure 688 referral has been submitted			*Must be done at least two years before leaving school

Contact DDS to explore residential options and create and Individual Transition Plan (ITP)			<p>This should be completed no later than 9 months prior to graduation (usually around the student's 21st birthday).</p> <p>The 688 Liaison from the human service agency convenes the ITP meeting where the plan is developed. The student, family, school team, and any involved adult service agencies need to think about the programs and support needed (short-term, 1-2 years) when the student leaves school.</p>
Write ITP and submit to the Transitional Advisory Committee (TAC)	688 Liaison		
Approve, modify or reject the ITP	Transitional Advisory Committee (TAC)		*TAC decision can be appealed by the student/parent
Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Follow-up with family after IEP meeting			
Meet with family and adult agency			Craft vision for post-secondary

			vision, observe some examples of day programs. School will accompany family/guardians to # programs
Coordinate after school job or weekend job, if appropriate			
Visit day programs, and if applicable, group home settings			Also consider options such as self-directing your child's services and Agency with a Choice, a co-employment model
Attend workshops, trainings	parent		
Find an adult primary physician and dentist	Parent/ Guardian		
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 21

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Meet monthly with classroom teacher			
Quarterly Transition Planning Updates			
Contact family, offer to set-up meeting			
Parent Vision			

Share social story about IEP meeting, if appropriate			
Student Vision			
Complete Transition Planning Form (TPF)			
Update appropriate measurable postsecondary goals based on age-appropriate transition assessment			
Include transition services that will reasonably enable student to meet postsecondary goals			
Create measurable annual skill-based IEP goals related to the student's transition services needs			
Invite student to the IEP Team meeting where transition services are discussed			
Invite any participating agency to the IEP Team meeting, with the prior consent of the parent or student who has reached the age of majority, if appropriate			
Follow-up with family after IEP meeting			

Complete Summary of Performance (SOP)			
Finalize transition portfolio			
Generate Individual Transition Plan	Adult Services		
Receive Individual Transition Plan	Parent		Can make revisions if necessary
Approve (or appeal) Individual Transition Plan	Parent		
Submit copy of ITP to education office			
Meet with family and adult agency			
Visit potential programs	Parent/ Guardian		
Receive prioritization letter	Parent/ Guardian		
Select service options	Parent/ Guardian		
Determine if a service coordinator has been assigned and is beginning to develop the individual's adult services.	Parent/ Guardian		3-5 months before leaving school
Confirm adult services			Between 21 and 6 months and 21 and 9months
Work with staff to produce a detailed action plan with steps needed to transition student from CCCBSD to adult services			

Prepare for Graduation			See graduation checklist
Attend workshops, trainings	parent		
Recent Assessments:			
Transition services and/or activities implemented:			
Notes:			

Age 22

Action Needed	Role of Person Responsible	Date of Action	Follow Up/ Notes
Provide family and new program with SOP			
Begin adult services	n/a		*Adult services are not an entitlement, adult services are based on eligibility and are subject to funding by the legislature.
Meet with adult service coordinator	parent		Set up an individual service plan (ISP), if applicable. Typically, occurs after a 60-day period of the individual being in the new program
Assure programming begins	DDS transition coordinator		
Follow-up with family	CCCBSD Transition Coordinator		About 6 months after graduation
Continue to learn about services	Parent		

Resources

Indicator 13

Indicator 14

Exceptional Lives Timeline

MAC Transition Timeline

The Arc Massachusetts Transition Timeline

Autism Program Transition Clinic

Autism Housing Pathways Timeline

Creating the Vision and Transition Planning

Chapter 688 Referral

Age of Majority

Guardianship

Non-Driver ID

DDS Eligibility

MRC

SSI

SSDI

MassHealth

Selective Service

Section 8 and other Housing Vouchers

Adult Family Care

Group Adult Foster Care