

## Provider Transition Checklist and Timeline

**Checklist Instructions:** The timeline provided here can be modified as developmentally appropriate for your adolescent patient. Use your clinical judgment as to which items apply to your patient. Refer to content-specific sections of this booklet for further information about these points.

Name: \_\_\_\_\_

HEALTH CARE	Ages 11-13	Ages 14-16	Ages 17-19	Ages 20-22
<b>Meet privately with the adolescent for part of the office visit</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Encourage the adolescent to assume increasing responsibility for his/her health care management</b>				
<ul style="list-style-type: none"> <li>• Assure the adolescent understands his/her health condition and medications</li> <li>• Send copies of reports, letters and tests to the adolescent and family</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Provide anticipatory guidance</b>				
<ul style="list-style-type: none"> <li>• Nutrition and fitness</li> <li>• Sexuality and relationships</li> <li>• Substance abuse and smoking</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Assess the adolescent's and the family's readiness for transfer to an adult health care provider</b>				
<ul style="list-style-type: none"> <li>• Initiate discussion about transfer to an adult health care provider</li> <li>• Identify possible adult care providers</li> <li>• Encourage patient to meet and interview adult providers</li> <li>• Initiate communication with the adult provider that the family has selected</li> </ul>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Implement the transfer to an adult primary care provider</b>				
<ul style="list-style-type: none"> <li>• Transfer medical records</li> <li>• Discuss nuances of care with the adult provider</li> <li>• Follow-up after the transfer</li> </ul>			<input type="checkbox"/>	<input type="checkbox"/>
<b>Assess the adolescent's ability to make independent decisions regarding health care, finances and other adult concerns for determining whether there is a need for guardianship/conservatorship</b>				
<ul style="list-style-type: none"> <li>• Initiate referral for assessment of competence if needed</li> <li>• Provide medical documentation</li> <li>• Follow-up on the process with the family</li> </ul>			<input type="checkbox"/>	<input type="checkbox"/>

Produced by the Institute for Community Inclusion at Children's Hospital, Boston, as part of the Massachusetts Initiative for Youth with Disabilities, a project of the Massachusetts Department of Public Health. Supported in part by project #HO1MC00006 from the Maternal and Child Health Bureau (Title V, Social Security Act), Health Resources and Services Administration, Department of Health and Human Services.

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EDUCATION	Ages 11-13	Ages 14-16	Ages 17-19	Ages 20-22
Remind the adolescent of his/her legal right to be present and participate in the educational planning meetings required by special education law		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask the adolescent and family how you can participate in the Individualized Education Program planning process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure the adolescent and family know that federal law requires that transition planning begin at age 14, focusing on the student's course of study as it relates to the adolescent's long-term plans		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make sure the adolescent and family know that starting at age 16 needed transition services must be included in the student's IEP. They should focus on the goals, objectives, activities, and services related to transition.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise families that at age 18 a student has the right to make all decisions in relation to special education programs unless the family has petitioned the court for guardianship or the student has chosen to share or delegate decision making to a parent.			<input type="checkbox"/>	<input type="checkbox"/>
Remind the adolescent and family that if s/he is not eligible for special education services, s/he may still be eligible for 504 accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remind the adolescent and family that the entitlement to special education services ends when the adolescent graduates, withdraws from high school or reaches age 22			<input type="checkbox"/>	<input type="checkbox"/>
Assess the adolescent's ability to make independent decisions regarding education starting at age 18. If independent decision-making does not seem appropriate, discuss the option of joint decision-making by the adolescent and the family.			<input type="checkbox"/>	
Discuss with the adolescent plans for further education beyond high school		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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EMPLOYMENT	Ages 11-13	Ages 14-16	Ages 17-19	Ages 20-22
Initiate discussion of different routes to employment such as higher education, technical training or supported employment		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Encourage the adolescent and family to explore community vocational opportunities and to become familiar with vocational services, even if further education is planned.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advise families that at age 18 a student has the right to make all decisions in relation to special education programs, including employment planning, unless the family has chosen otherwise or has petitioned the court for guardianship.			<input type="checkbox"/>	<input type="checkbox"/>
Discuss with the adolescent and family the importance of early work experiences and job-related skills such as resume preparation and interviewing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remind the adolescent and family that at age 14 individualized transition planning should focus on developing a vision for employment and education	<input type="checkbox"/>	<input type="checkbox"/>		
Encourage the adolescent and family to contact local and state agencies involved in employment services.		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have the adolescent and family contact the Social Security Administration to learn about and plan for financial aspects of employment, such as work incentives			<input type="checkbox"/>	<input type="checkbox"/>
RECREATION	Ages 11-13	Ages 14-16	Ages 17-19	Ages 20-22
Discuss in-home and community recreation options	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help families develop strategies to foster friendships and avoid social isolation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share health care information that may affect the adolescent's ability to participate in recreational activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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