

Adolescents and young adults need support and preparation as they assume increasing responsibility for their own recovery and wellness activities while maintaining their family supports and other community resources. It is important to assist the adolescent and young adult in defining roles and outlining levels of involvement that foster interdependence and independence without severing relationships with family, natural supports and community.

The following action items are a guide to the Child and Family Team (CFT), Child and Adult Case Management staff, youth and family members to identify and to assist in the development of an individualized transition plan.

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

Note: The emphasis in this checklist and timeline of transition domains pertains to the preparation for adulthood, not adult services.

No appropriate services will be discontinued

I. Beginning at age 14 and to be reviewed and updated through age 16

A. CFT to identify with the young adult his/her needs regarding independent living skills. These would include:

For each age group marked with a check box, take the action described	Ages 14-16	Ages 17-18	Ages 19-21
ACTIVITIES OF DAILY LIVING (ADL)			
Assess the youth's skills and needs in the following areas:			
Self-care (personal, hygiene, dressing)			
 Housekeeping (meal planning, shopping and cooking; maintaining and cleaning living space; cleaning and maintaining clothing; dealing with emergencies) 			
Consider need for personal care/home care provider			
Assess youth's interest and skills in self-advocacy			
Discuss importance and role of self-determination			

Identify new skills that can be learned and develop training plan		
Research resources/supports available for youth to develop these skills and increase independence in ADLs		
Evaluate mobility needs Ability of youth to be independent in walking within and between all buildings used for daily activities		
 Consider youth's employment, education and recreation plans in context of mobility skills; Identify needed and reasonable equipment/adaptations 		
Develop plan for acquiring equipment/adaptations identified above		
Review youth's travel/transportation needs and skills: • Need for and ability to access transportation, special transportation services, or other transportation option in the community		
Ability to access and complete driver's education, identify adaptive driving programs, equipment, and vendors		
Develop plan for acquiring skills, resources, equipment identified above		
Discuss and support youth's interests and skill development and link with relevant programs and services		
Assess youth's interest and skills in self-advocacy relating to planning and receiving training relating to their ADL skills		
Discuss importance and role of self-determination in making decisions about their ADL skills and training		

- B. CFT to utilize tools from Arizona Department of Health/Division of Behavioral Health (ADHS\DBHS) <u>ADHS/DBHS Transition to Adulthood Practice Protocol.</u>, Casey Life Skills web based tool, Transition to Independence Process (TIP) system service/treatment planning or through the young adult's school to evaluate and measure the young adult's life skills.
 - 1. ADHS/DBHS web site: <u>ADHS: Division of Behavioral Health Services:</u> ADHS/DBHS Clinical Guidance Documents
 - 2. Casey web site: www.caseylifeskills.org
 - 3. Transition to Independence Process (TIP) System: http://tip.fmhi.usf.edu/

- C. CFT to monitor and assure that independent living skills are implemented to help prepare the young adult for adulthood based upon his/her individualized needs.
- D. CFT to explore educational needs. These would include:

II. Secondary Education

For each age group marked with a check box, take the action described	Ages 14-16	Ages 17-18	Ages 19-21
SECONDARY EDUCATION			
Ask the youth and family how you can participate in the Individualized Education Program (IEP) planning process			
Determine how youth and family would like you involved in achieving IEP goals			
Discuss areas to include in IEP:			
Health-related topics			
• ADL training			
Services such as OT, PT, counseling			
Vocational goals			
Consider/discuss implications of passing educational performance levels on student's future planning and continuing services in secondary school			
Make sure the youth and family know that federal law requires that transition planning must be included in the IEP in effect when the student turns 16. This means planning usually must begin by age 15, focusing on the student's course of study as it relates to the youth's long-term plans			
Connect with school staff to ensure that transition planning is being done			
Assist youth and family in developing and revising the Vision Statement			
Explore vocational program vs. traditional education options			
Advise youth and family that starting at age 16, needed transition services must be included in the student's IEP. They should focus on the goals, objectives, activities and services related to transition.			
Connect with school staff to reinforce need for statement of needed transition services.			
Reinforce need to include health-care topics in service needs, as appropriate			
Ensure that life skills development is addressed in IEP's service plan			
Discuss including Occupational Therapist input/guidance in process			

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		
Assist in arranging any needed evaluation		
Ensure that the adolescent and family understand that the entitlement to special education services ends when the youth graduates, withdraws from high school or reaches age 22		
Ensure youth and family understand that passing GEDs can be a sufficient requirement for "graduating"		
Remind the youth and family that 2 years before leaving school, referrals for those on IEPs must be made to adult service agencies		
Assist family with these connections through the secondary school		
Assess youth's interest and skills in self-advocacy regarding his/her education goals		
Discuss importance and role of self-determination regarding his/her education and IEP		

III. Beginning at age 16 and through age 17 (Continue above and)

- A. CFT to continue to monitor and implement independent living skills to help prepare the young adult for adulthood.
- B. CFT with the young adult to identify areas of need for transition in order to create a transition plan based upon his/her individualized needs.
- C. CFT to assure that young adult's educational needs are being met and that the school is involved in the transition if needed. Include educational goals post age 18 in transition plan. These would include:

For each age group marked with a check box, take the action described	Ages 14-16	Ages 17-18	Ages 19-21
AFTER HIGH SCHOOL: POST-SECONDARY EDUCATION/EMPLOYMENT			
Initiate discussion of employment visions and goals • Explore options for assessing skills and interests			
Discuss work ethics, professional behaviors, employer expectations • Help youth and family identify the steps needed to address these issues and incorporate in student's IEP if appropriate			

Help youth and family to understand the importance of "creative" ways to acquire job-related experiences as a young person: volunteer work, internships, camp employment, other community experiences		
Initiate discussion of different routes to employment such as higher education, technical training or supported employment		
Help youth and families to understand the different kinds of job supports and resources		
Reinforce the importance of networking for employment and to build necessary skills (job interviewing, resume preparation)		
Help youth explore and identify ways in which they can network Remind the youth and family that at age 14, individualized transition planning		
should focus on developing a vision for employment and education		
Connect with school staff to ensure transition planning is underway Help youth and families in including employment/vocational goals and action steps in student's IEP		
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		
Make sure family understands that public benefits such as SSI provide incentives for employment		
Discuss post-secondary options and resources, including colleges, community college, vocational programs		
 Help youth to understand how post-secondary programs differ from secondary with respect to supports provided Discuss needed accommodations and how they might be accessed Direct youth to financial aid information 		
Discuss the role of the American Disabilities Act, and Section 504 in employment and post-secondary education		
Assess youth's interest and skills in self-advocacy in pursuing employment and post-secondary education		
Discuss importance and role of self-determination in making employment and post-secondary decisions		

IV. Integration of Behavioral Health, Healthcare and Healthy Living

A. CFT to assist the young adult in obtaining mental health, behavioral health and medical records. These would include:

For each age group marked with a check box, take the action described	Ages	Ages	Ages
	14-16	17-18	19-22
BEHAVIORAL HEALTH, HEALTHCARE AND HEALTHY LIVING			

Assess youth's needs for a health advocate/agent/proxy to provide for and communicate about health-related needs		
Review need to include health related topics in the IEP		
Encourage the youth to meet privately with his/her provider for part of the office visit		
Assess youth's ability to assume increasing responsibility for his/her health care management, including coordination between behavioral health and medical health in the following areas:		
 Understanding health care condition and medications Handling prescription needs Scheduling medical appointments and related transportation Requesting, reviewing copies of medical reports, letters, test results Playing active role in appointments with providers 		
Assess dental, vision and pre-natal needs and how they are being addressed		
Discuss youth's readiness for transfer to an adult health care provider • Encourage youth/family to discuss transferring with his/her pediatric provider(s) • Assist with identification of possible providers • Encourage youth to meet and interview adult providers		
Remind family that when youth becomes a legal adult at age 18, decisions about health care, finances and other adult concerns become the youth's decision unless legal steps for guardianship/ conservatorship have been taken		
Review health insurance situation: continuing coverage through family; Medicaid/Medicare; educational or employment benefits		
Remind the primary medical provider to enter into such discussions with the youth about risk behaviors and abuse.		
Assess youth's interest and skills in self-advocacy in managing their health care and in supporting their health choices		
Discuss importance and role of self-determination in managing their health care and creating a healthy lifestyle • Discuss how to avoid secondary conditions relating to lifestyle and health choices		

CFT to explore the availability of and additional supports if the young adult is involved in CPS. Review of the Voluntary Foster Care Agreement for Young Adults Age 18 through 20 should be explored. The Young Adult Program (YAP) and the Independent Living Subsidy Program (ILSP) should also be explored.

IV. On 17^{th} Birthday or shortly thereafter

A. If applicable, assist the young adult with application for Social Security and other benefits. These would include:

For each age group marked with a check box, take the action described	Ages 14-16	Ages 17-18	Ages 19-23
BENEFITS, HOUSING, LEGAL & FINANCIAL CONCERNS			
Highlight and assess youth's need for assistance with managing personal finances; help with information related to financial supports and accommodations			
Paying billsChecking/savings accountsDebit/credit cards			
Discuss how the young adult will financially support him/her self			
Contact the school to ensure coordination with its life skills development program			
Discuss public benefit work incentive programs, such as Social Security and how youth can utilize them			
Help family identify any need, and resources, for assistance related to financial planning, document preparation (e.g., special needs trusts), and estate management			
Help family review needs, and resources, for legal assistance related to guardianship, conservatorship and payee			
Identify supports that will be needed to facilitate housing vision (e.g., personal care supports), adaptations, skill development training Onsider physical, emotional and equipment supports			
Assess youth's interest and skills in self-advocacy in managing his/her finances and benefits and making housing choices			
Discuss importance and role of self-determination in making decisions about housing and managing their personal finances			
Discuss the importance if the young adult needs referrals to, and assistance with applications for: Supplemental Security Income (SSI): Rehabilitative Services Administration (RSA): Title XIX/XXI Eligibility: Serious Mental Illness (SMI) Eligibility Determination:			
For each area checked above: Are there medical and school records to substantiate these needs? Begin to gather necessary information to expedite these applications or determinations when the time comes to actually apply. Develop a timeline and task list for when appointments are needed.			

Discuss what actions need to be taken if the child is not eligible for Title XIX or title XXI benefits and/or Social Security Disability Income (SSDI) and is not determined to have a serious mental illness.		
The Child and Family Team and/or the clinical team members must: 1. Assist the child and/or family or guardian in applying for potential benefits (e.g., SSI, food stamps, etc.) 2. Assist the child and/or family in applying for Title XIX or Title XXI benefits; if the child and/or family are already eligible; determine if eligibility will continue for the child once he/she turns 18. 3. Address any new authorization requirements for sharing protected health information due to the child turning 18 (as described in Section 4.1, Disclosure of Behavioral Health Information) to ensure that the clinical team can continue to share information. 4. Ensure that the child's behavioral health category assignment is changed consistent with Section 7.5, Enrollment, Disenrollment and other Data Submission. Once the child's behavioral health category assignment has been changed, ongoing behavioral health service appointments must be provided according to the timeframes for routine appointments in Section 3.2, Appointment Standards and Timeliness of Services. 5. Upon turning 18 years of age, if the person is not eligible for services as a person determined to have a serious mental illness or the person has been determined ineligible for Title XIX or Title XXI services, behavioral health providers can continue to provide behavioral health services consistent with Section 3.21, Service Prioritization for Non-Title XIX/XXI Funding and Section 3.4, Co-Payments.		

Please Note: If CFT identifies the need to apply for Seriously Mental III Services:

- A. Clinical Team to complete the SMI packet and submit to Magellan for Seriously Mental Ill (SMI) determination. Clinical Team will complete an eligibility packet according to the Magellan Provider Manual, Section 3.10 and submit it to the RBHA within 14 days of the CFT decision. (CFT facilitator to follow up if no determination made after 30 days.) When a child receiving behavioral health services reaches the age of 17, behavioral health providers must determine whether the child is potentially eligible for services as an adult with a serious mental illness. If so, behavioral health providers must refer the child for an SMI eligibility determination pursuant to Section 3.10, SMI Eligibility Determination.
- B. CFT to continue to monitor and implement independent living skills to help prepare the young adult for adulthood.

V. If a young adult is determined eligible for SMI Services:

- A. The young adult is assigned to a clinic based on his/her residence.
- B. CFT facilitator and/or the Youth's Case Manager to contact the SMI case manager to invite him or her to the CFT to assist with the transition planning.
- C. CFT contact sends records, paperwork and progress information to adult provider: clinical director, and/or SMI case manager.
- D. CFT ensures that the young adult and the family member have a copy of all mental health, behavioral health and medical records.

VI. SMI Case Manager becomes part of CFT

- A. Participates in development of a transition plan.
- B. Helps to determine the amount and types of support needed when the young adult turns 18.
- C. Attends CFT to ensure that plan is implemented.
- D. Schedules appointments, completes applications, and prepares for Adult Services as directed by the transition plan, young adult and CFT. (e.g., psych appointment at 18 for medication continuation, housing applications etc. Invites Vocational Rehabilitation specialists as needed.)

VII. If Determined Non-Eligible for SMI Services

- A. The guardian has a right to file an appeal and can contact Magellan's Grievance and Appeals at (602) 652-5863.
- B. Discuss what actions need to be taken if the child is not eligible for Title XIX or Title XXI benefits and/or Social Security Disability Income (SSDI) and is not determined to have a serious mental illness?

VIII. If Determined Need for General Mental Health/Substance Abuse Services

- A. If the CFT identifies the need to continue with behavioral health services, the CFT locates a general mental health agency for adult services to schedule an adult intake and psychiatric appointment for medications post 18th birthday.
- B. CFT ensures that the young adult has a copy of all mental health, behavioral health and medical records.
- C. CFT to ensure that the young adult has a state identification card, Social Security card, and copy of birth certificate.

IX. Consider for ALL Transitioning Young Adults

For each age group marked with a check box, take the action described	Ages 14-16	Ages 17-18	Ages 19-24
Recreation/Leisure, Socialization, Companionship			
Assess youth's current level of involvement in the community, including school activities, clubs, organizations, cultural activities, religious groups, etc.			
Discuss in-home and community recreation options			
Discuss youth's interests in activities for fun, physical and mental fitness • Help identify resources • Help identify new skills or activities in which youth has interest			

Help families develop strategies to foster friendships and avoid social isolation • Consider activities that can be done in/around home, neighborhood and school as well as in the community		
Assess what information about health care needs should be available to increase access to recreational activities		
Consider/assess youth's personal behaviors, strengths, and needs which will contribute to personal fulfillment. Help identify resources, supports as necessary: • Anger management • Ability to solve problems, make decisions • Self-awareness and self-confidence • Organizational skills • Self-advocacy skills • Perception of self		
 Consider/discuss youth's interpersonal relationships Connection with positive role models Ability to make and keep friends Dating; sexual activity 		
 Explore the role that youth's culture and religion may play in long-term planning Interdependence and Independence Socialization Health 		
Assess youth's interest and skills in self-advocacy in building social relationships, and participating in recreational/leisure/personal activities		
Discuss importance and role of self-determination in their relationships and recreation and social activities		
Link youth to programs and resources that will help them develop social relationships and find/participate in recreational/leisure activities		
Will the child have or need transportation to appointments and other necessary activities.		
Help identify resources, supports as necessary:		

A. CFT to contact the Arizona Health Care Cost Containment System (AHCCCS) office near the young adult's residence to schedule an appointment to update his/her AHCCCS eligibility. AHCCCS number is (602) 417-7100 / web site: www.ahcccs.state.az.us / Email address: memberservices@azahcccs.gov.

- B. CFT and young adult to determine if there is a need for a payee, conservator or guardian.
- C. CFT and the young adult prepare for continuation of care, support and collaboration of systems past 18th birthday. The young adult should be advised of the importance of continuing support and discuss the need to sign necessary consents upon 18th birthday.
- D. CFT facilitates an appointment at Social Security Office (1-800-772-1213). Determination will be made primarily on work history (how the disability affects ability to work).
- E. If recipient has no other sources of income and is medically unable to work, CFT will facilitate application with DES for emergency cash assistance, food stamps, and Medicaid. Web site: Department of Economic Security
- F. CFT to ensure that recipient has a 30-day supply of medication and a follow up appointment with adult psychiatrist.

Key Elements for the Adult Provider to Address in an Individual Service Plan

I. Family Involvement

- A. Initiate contact with family and engage in developing ISP.
- B. Discuss in CFT opportunity for family involvement after transition (post 18).
- C. Assist young adults/supports in filling out Releases of Information as applicable.
- D. Review <u>ADHS/DBHS Transition to Adulthood Practice Protocol</u>; http://azdhs.gov/bhs/guidance/family_youth.pdf; and, Technical Assistance Document 5 **Information Sharing with Family Members of Adult Behavioral Health Recipients**, http://azdhs.gov/bhs/guidance/isfm.pdf.

II. Vocational / IEP

- A. Is the young adult going to continue his/her education by qualifying for a high school diploma or GED?
- B. To assist young adult and family/supports in scheduling an IEP prior to the young adult turning 18. The clinical team members to participate in the IEP meeting. The goal of IEP would be to address the educational needs past 18.
- C. Explore vocational rehabilitation services.

III. Benefits

- A. Work with young adult in scheduling an appointment for Social Security Income (SSI).
- B. Work with young adult in scheduling an appointment for Arizona Health Care Cost Containment System (AHCCCS).

IV. Housing

- A. Explore housing options.
- B. Income needs. Is the young adult able to support himself/herself?

- C. Employment.
- D. Assess the need for independent living skills.
- E. Complete applications for Community Building, Community Living Housing, or Residential. This is to be accomplished one month prior to 18th birthday.

V. Guardianship

- A. Mental Health Power of Attorney
- B. Guardianship and Payee
- C. Please refer to Provider Manual Section 3.12, for Advance Directives

VI. Crisis Plan

- A. Update the crisis plan every (3) months and prior to the young adult's 18th birthday
- B. Review <u>ADHS/DBHS Transition to Adulthood Practice Protocol</u> and http://www.azdhs.gov/bhs/guidance/cft.pdf

VII. Substance Abuse

A. Review <u>ADHS/DBHS Transition to Adulthood Practice Protocol</u>

VIII. Medication

A. If the young adult is taking medications prescribed for the young adult's behavioral health issue, the location and date of the young adult's first appointment with a practitioner who can prescribe medications must be made. There must not be a gap in the availability of prescribed medications to the young adult.