



# Opening Doors

## A Guide to Adult Services

### **Planning for Life After High School**

#### **A Handbook for:**

- ▶ Students
- ▶ School Counselors
- ▶ Teachers
- ▶ Parents



## **A Message from State Superintendent of Public Instruction, Tony Evers, PhD**



Every child must graduate feeling hopeful about their future and ready for further educational opportunities and the workforce. It is our mission to prepare Wisconsin's students to become contributing members of their communities and the world by connecting youth to the resources necessary for a successful transition. For students with disabilities, this can be accomplished with comprehensive advance planning for life after high school. The

purpose of this interagency handbook, *Opening Doors: A Guide to Adult Services*, is to assist youth and their families to navigate through this planning process.

This handbook has been created to assist you, your parents, school counselors, and others on your IEP team in understanding the range of adult services available and how to access them. As you think about your life after high school, it is important to also think about what type of help you will need, where to find help, and how much this help will cost. This handbook provides information on many types of adult services including job centers, technical colleges and universities, vocational rehabilitation, transportation, social services, human services, social security, independent living centers, housing agencies, private agencies, and many more. In addition, this handbook also provides sample questions to use when interviewing agencies and providers to make sure you are getting the most complete information possible.

Remember, you have many people who will support you in your planning, but, in the end, you will make the decisions. Being well informed and well prepared will help ensure you have a happy and successful life after high school.

Good luck as you continue to plan your future!

Tony Evers, PhD, State Superintendent



# Table of Contents

Message to Students (Parents/Teachers/Counselors)	6
Planning Ahead	7
Personal Information File	7
Adult Services Overview	8
Age of Majority	10
Guardianship	11
Adult Services in Transition Planning	11
Postsecondary Education	11
Technical Colleges and Universities in Wisconsin	12
Adult Community Services	13
Aging and Disability Resource Centers	13
Long-term Care Agencies and Options	14
Family Care and Partnerships	14
IRIS (Include, Respect, I Self-Direct) Program	17
Social Security	22
Vocational Rehabilitation	24
Job Centers	28
Independent Living Centers	29
Housing Agencies	30
Private Agencies	30
Life Span Training	31
<b>Appendices</b>	<b>33</b>
I. Guardianship	34
II. Roles and Responsibilities	38
III. Sample Agency Letters	43
IV. Sample Agency Phone Call Interview Guide	46
V. Possible Members of the Transition Team	47
VI. Opening Doors Series Order Form	49

**Author:** Sharon Rybacki

**Edited by:** Mary Ann Beckman, Jeanne Bowman, Cynthia Cain, Steve Gilles, Gail Kolvenbach, Michael Linak, Sarah Lincoln, Jennifer Neugart, Laura Owens, Charlotte Price, Courtney Salzer, Jan Serak, Mary Skadah, Fran Traynor, Linda Maitrejean, and Wendi Dawson.

**Advisory Group for Transition of Students with Disabilities to Higher Education:**

Charlotte Price, Family Assistance Center for Education, Training and Support (FACETS); Lisa Greco, Appletree Credit Union; Raquel Paddock, Oak Creek School District; John Gugerty, UW-Madison Career Center; Scott Fromader, Consultant, Department of Workforce Development; Karen Lien, Division for Vocational Rehabilitation; Phil Marshall, Creative Employment Opportunities; Enid Glenn, Division for Vocational Rehabilitation; Stephanie Perla, Division for Vocational Rehabilitation; and Glenn Olson, Department of Workforce Development.

**DPI Representatives:**

Carolyn Stanford Taylor, Assistant State Superintendent; Stephanie Petska, Director Special Education; Wendi Dawson, Transition Consultant



## Message to Students (Parents/Teachers/Counselors)

Preparing for graduation and thinking about your future beyond high school is a very exciting time in anyone's life. The possibilities are endless. There are many things to think about.

Where do I want to go to college?

What kind of job or career do I want?

Where and with whom do I want to live?

If you have a disability, the questions can become a little more complicated.

What community resources are available to assist me with my goals?

What other services and supports are out there?

How do I know which agencies can provide the services and supports I need?

What if I have health concerns or transportation needs?

During your Individualized Education Program (IEP) meetings for transition, you will talk about all of these questions. You may need help with some activities and not others. It's important to know where to get the help you need, how much it will cost and what agencies might help cover those costs. The earlier you begin planning for your life after high school, the better because you will have more time to find the services and supports you do need.

*Opening Doors: A Guide to Adult Services* will help you, your family, and others who work with you understand the adult service system as well as services available in your community.

## Planning Ahead

It is important that you begin to think and plan for life after high school as early as possible. While you are still in high school, you may be able to make decisions about your adult life, including where you want to live, where you will work after you leave high school, and whether you want to obtain further education or training.

Federal law states that transition planning at school should start no later than age 16. Chapter 115 of Wisconsin state law states that transition planning begins at age 14 and that you must be invited to each of your Individual Education Program (IEP) team meetings or any meeting that talks about your transition needs. You should begin to think and talk about your future needs, wants, and goals as early as possible. It will also be important to identify and learn about the services and/or supports you will need in order to achieve your goals. Agency representatives should be invited to the IEP meetings to talk about their services and supports. Information about accessing adult service agencies allows you and your school transition team to better prepare for the future. The transition IEP will include all this information.

## Personal Information File

A good way to begin to plan for the future is to start and keep a file of your personal information. This should include the following:

- College and university information including personal information (where do you want to attend college, where have you applied, will you need financial aid?)
- Adult agency information (about service and support options, and eligibility)
- Financial assistance received
- Guardianship and protective services and protective placement records
- School records (IEPs, list of needed accommodations, Summary of Performance, high school transcripts, current documentation of your disability and evaluation reports)
- School work samples (samples should provide information on strengths and challenges)
- Letters of recommendations from parents/employers/school staff/others
- Job resumes (all work experiences)
- Medical records

It is important to ask questions in planning for the future. You will find questions throughout this handbook that will help you plan. You can add your own questions and answers to your record file. You will want to have all your questions answered. Keep in mind that answers can be different for each service depending on the county in which you live.

### TIP!

For the student with limited communication skills: Keep a record of what the student likes to do, think, and talk about. Note what the student takes pride in and what makes the student happy, pleased, or proud.

# Adult Services Overview

## How do I find out about adult service agencies?

As you get close to age 18, you may be able to get personalized help from a variety of public and private agencies. In some instances, agencies may be able to provide information and assistance before you turn 18 years old.

There are a number of ways to find the adult service agencies you may need:

- The Wisconsin State Transition Initiative (WSTI) sponsors a statewide clearinghouse that includes Transition Resource Directories with information about state and county resources and services. If you need help, ask your district to get this information for you from the website at [www.wsti.org](http://www.wsti.org).
- Call your county's Department of Social Services, Health and Human Services, or Community Services (find out what the services are called in your community). The telephone book may list these agencies under the special pages for government.
- Call the statewide United Way 211 number for help in getting contact information for agencies that serve your community. Your 211 call will be directed to the area in which you live. You may also call First Step (800-642-7837), which provides people with special needs a statewide listing of agencies/services and contact information and follow up calls if you need additional assistance. First Step also will connect you with the agencies called "Bureau for Children and Youth with Special Health Care Needs" which offer a variety of services.
- Attend transition activities such as fairs, workshops, and conferences offered through your school or adult service agencies.
- Contact your Aging and Disability Resource Center (ADRC).
- Contact Independent Living Centers.

## How and when do I contact adult service agencies?

The first agency to begin communicating with is the Aging and Disability Resource Center (ADRC), if there is one in your county. ADRCs are a valuable source of critical information about adult services and supports. Once you have located the ADRC, or the human services department in those counties without an ADRC, ask them what services are provided for students with disabilities. Explain that you are beginning to plan and apply for services available during or after high school graduation. When you visit or talk with an agency, you can invite a representative from that agency to your IEP meeting. Your school can also invite an agency representative, with permission. Having an agency representative at your IEP meeting can be very helpful. Planning with agencies usually begins one to two years before you graduate but can start as early as age 16.

## The Case Manager

You may be given a case manager from the county in which you live at age 17 years, 9 months or older, depending on your disability. A case manager is a support person who can help in several ways. The case manager may suggest people who should come to the transition IEP team meetings (see Appendix – Possible Members of

the Transition Team). The case manager can help explain the service system and funding. Case managers will also monitor how the services are working for you. Depending on which agency you are working with, the title of case manager might be different, such as “counselor,” “care manager,” or “social worker,” instead of case manager.

## How are adult service agencies involved in the IEP team meeting?

You may invite agency personnel to your IEP team meeting, however, it is also the school’s responsibility to invite any agency representative that is likely to be responsible for providing or paying for your adult transition services. The school must have your permission (or the permission of your parent/guardian if under the age of 18) to invite agency representatives to your IEP team meeting. The purpose of that permission is to protect your privacy. If a representative of an agency is unable to attend the IEP team meeting, the school must find another way to bring the agency information to the meeting (example: video conference, conference call, etc.).

The main role of an adult services representative at the IEP team meeting is to explain what the agency provides and what you may be eligible for. The services an agency agrees to provide (while you are still in school) should be written into the IEP. If the agency does not follow through with assistance, the school must have another IEP team meeting to decide other ways for you to meet your goals.

**IDEA 2004 states...**If a participating agency, other than the local educational agency, fails to provide the transition services described in the IEP in accordance with paragraph (1)(A) (I)(VIII), the local educational agency shall reconvene the IEP team to identify alternative strategies to meet the transition objectives for the child set out in the IEP (Sec. 614(d)(6)).

## Will I be eligible for adult services?

**Important To Know:** Each agency decides who is eligible for services. While the special education services you receive in school are mandated by law, adult services are NOT mandated. There is no law that guarantees an adult will receive services from an agency. Services and supports always depend on the following:

- Type and severity of disability (eligibility), and

The availability of money and staff.

**Entitlement** means an individual MUST be provided by law (mandated) with the services needed (example: special education).

**Eligibility** for adult services means services MAY be provided depending on disability and resources available.

The Americans with Disabilities Act (ADA) ensures individuals with disabilities have the same civil rights as people without disabilities. The ADA prevents discrimination in almost every aspect of public life – employment, transportation, services to the general public, state and local government, and telecommunications. The ADA defines disability as having a “physical or mental impairment that substantially limits one or more major life functions” (moving, hearing, seeing, learning, working, etc.). The definition includes “having a record of having had such an impairment or being regarded as having such an impairment.”

## TIP!

It is often better to talk to agencies well before the IEP. Having the information in advance will give you enough time to think about your options. That way, at the IEP team meeting, you can make decisions based on what you know (and avoid quick decisions).



## **TIP!**

Learn about the age of majority, your rights, and responsibilities.

### **How long will I wait for adult services?**

There may be a waiting list for services even if you are eligible. (Waiting lists consist of people who need services and have applied but, because of limited funding, are still waiting to get services). Money is often not available to serve all the people who need help. You may graduate from high school and find there will be a long wait for services depending on the county you live in and the services offered. For this reason, it is important to find out early what an agency can do for you. You should apply and ask to be placed on a waiting list if one exists as soon as possible. Ask how long it will be before services are available for you.

## **Age of Majority**

### **What do I need to know about the “age of majority?”**

At age 18 (the “age of majority”) you become a legal adult. This means that, by law, you make your own decisions. You must be present at the IEP team meeting. A good self-advocacy skill would be to learn how to lead the discussion at your own IEP team meeting. Your parents may be invited to attend and participate in the meeting with your permission. You and the IEP team are the primary decision makers.

IDEA 2004 states...the student’s IEP must contain information that the student has been informed that the transfer of rights will take place. This information should be in the IEP for at least one year prior to the student reaching the age of majority (Sec. 614(d)(1)(A)(i)(VIII)(cc)).

# Guardianship

## Guardianship and Alternatives to Guardianship

A court may decide that an adult child is not capable of making certain decisions. An adult who is unable to make personal or financial decisions may need a guardian. A guardian is a person appointed by the court. A guardian might be a parent, sibling, relative, friend, or someone hired by a guardianship agency. The guardian must keep records, understand the person's disability (and least restrictive environment), and show care for the person. When the school notifies the parent of the age of majority (no less than one year before the age of 18), the parent is provided with time to consider any potential guardianship needs of the child.

There are several alternatives to guardianship that provide personal and financial protection for the child. Guardianship laws in Chapter 54 explain that a person needing assistance with decision making should have this done with methods that are "least restrictive" to personal liberty and his/her ability to exercise his/her rights. Least restrictive is further defined as that which promotes the greatest possible integration of an individual into his or her community that is consistent with meeting his or her essential requirements for health, safety, habilitation, treatment, and recover and protecting him or her from abuse, exploitation, and neglect (Ch 54.10(3)(a)(4)). For this reason, it is important to review alternative methods to guardianship, including the 2006 Revised Wisconsin Guardianship rules, when deciding how to assist an individual with decision making. (see Appendix 1 for further information on guardianship). Changes to the laws on guardianship have improved in part by limiting its use when not necessary.

## Adult Services in Transition Planning

### What adult service agencies might be involved in transition planning?

#### Postsecondary Education

(also see *Opening Doors to Postsecondary Education and Training*)

#### Questions to ask about postsecondary education

- What information do I need in my personal file if I'm going on to postsecondary education? What type of disability documentation do I need?
- What do I have to do to get into the university or technical college of my choice? (e.g. complete application, write an essay, submit a fee)
- How do I match my interests and needs with the course offerings of the college?
- What services are offered on campus to help students with disabilities?
- How do I match my needs to the programs and services offered at the college?
- What accommodations and assistive technology do I need?
- What financial questions should I ask?

- What housing accommodations are available?
- What transportation is available?
- Do I have the motivation/ability to pass the same subject exams as students without disabilities?
- Do I have the social skills to be safe/to have friends?
- Do I have a Summary of Performance (SOP) prepared?

## **Technical Colleges and Universities in Wisconsin**

(also see Opening Doors to Postsecondary Education and Training)

If you want to prepare for college/university entrance, you must take the required subjects to qualify for postsecondary education and you must earn the required credits for high school graduation. Talk to your school guidance counselor to ensure you have the necessary credits. You may also contact postsecondary institutions starting in 9th grade to find out about programs and services. You must also be able to pass university/college entrance exams. Testing accommodations may be available and vary per college/university.

### **What must I do to get support and assistance in college?**

In order to qualify for assistance you must provide disability documentation or proof of your disability. The following information must be provided:

- Proof that the disability currently exists
- The nature and extent of the disability
- The historical record of the disability and current impairment
- The functional limitations of the disability and the link to specific accommodations\*

\*If you have more than one disabling condition, information must be complete on all disabilities. There must also be explanations as to why each accommodation is needed.

The documentation of the disability must be prepared by a licensed clinical or educational professional. The professional must be familiar with the history and functional implication(s) of the disability. The documentation must be provided on letterhead; it must be dated and signed.

Further information on disability documentation can be found on this website:  
<http://www.dpi.wi.gov/sped/pdf/tran-disab-docum-guide.pdf>

Upon exiting high school you will receive a Summary of Performance (SOP). An SOP contains:

- Summary of academic achievement
- Summary of functional performance as it relates to measurable postsecondary goals

- Recommendations on how to assist the student in meeting the student's measurable postsecondary goals

Note: These recommendations do NOT imply that if you qualified for special education in high school, you will automatically qualify for services in postsecondary education or the employment setting. Eligibility for services in postsecondary settings is decided on a case-by-case basis.

## Adult Community Services

Each county is responsible for providing services to people with physical, sensory, developmental disabilities, mental illness, and drug and alcohol dependency. The county may assign services for these populations to different agencies within the county such as the Department of Social Services, Human Services, Community Programs, or a Unified Service Board. In most counties, publicly funded long term care is provided through a Family Care managed care organization (MCO), a Partnership program, or the IRIS self-directed support programs (see below).

If your county has an Aging and Disability Resource Center (ADRC), this is the first place to go for information on adult services for individuals who have disabilities. As of 2011, the majority of counties in Wisconsin have an ADRC. (see below).

## Aging and Disability Resource Centers (ADRCs)

### Questions to ask about ADRCs:

- Do I need an advance appointment to talk with an ADRC representative?
- In addition to receiving information on available services and supports, can someone at the ADRC assist me in contacting service providers and exploring their services?
- Do I have to be financially eligible for services?
- What help is available from the ADRC?
- What public programs might I be eligible for and what are the criteria for eligibility?

### TIP!

Remember to have proper disability documentation developed prior to graduation. Postsecondary institutions differ regarding documentation requirements. It is critical to check with the individual postsecondary institution to understand what your needed documentation requirements are. There is a specific contact person at each postsecondary institution (*see Opening Doors to Postsecondary Education*). Neither the IEP nor SoP alone will be sufficient documentation at the college level. You or your parent may request appropriate current documentation before leaving high school. You can ask your school to assist with collecting this documentation. Please check the resource, *A Wisconsin Disability Documentation Guide: Helping People with Disabilities Prepare for Post-Secondary Education and Training*, January 2011. <http://www.dpi.wi.gov/sped/pdf/tran-disab-docum-guide.pdf>

## What services does the ADRC provide?

Aging and Disability Resource Centers are friendly “Information Centers” that offer the general public a one-stop-shopping place to go for information on issues affecting older adults and individuals with disabilities. They also assist people in navigating the complex adult service system. ADRCs are the entry gate for publicly funded long term care programs, such as Family Care and IRIS (Include, Respect, I Self-Direct). ADRCs may also help your family, friends, caregivers, doctors, hospital discharge planners, and other professionals who work with older adults and individuals with disabilities. You can begin receiving personalized services from an ADRC at the age of 17 years and 6 months. This assistance is offered at your ADRC office location, by phone, or by home visits. You will find contact information for your local ADRC in the government pages of the phone book, or at <http://www.dhs.wisconsin.gov/LTCare/adrc/customer/adrccontactlist.pdf> . For more information visit: <http://www.dhs.wisconsin.gov/lcicare/adrc/>.

### TIP!

Ask your teacher to make contact with the local ADRC before your IEP meeting to learn about services available in your county.

ADRCs are available to assist individual youth and their families with the transition to the adult system beginning at age of 17 years 6 months. Before then, the ADRC may provide general information to you, your parents and/or your school. ADRCs can help individuals with any type of disability.

Services provided include:

- Information and assistance on what resources are available in your community, including housing, transportation, long term care, mental health, employment and many more (If necessary, ADRC staff can help you make contact with organizations providing these resources)
- Long-term care options counseling
- Benefits counseling
- Crisis counseling
- Health and wellness counseling and programs
- Adult protective services
- Additional services, depending on the ADRC

## Long-term Care Agencies and Options

Depending on your county, long-term care services may be provided by Social Services, Human Services or Community Services. For those counties with ADRCs, you will also be able to learn about or receive services from Family Care and IRIS (Include, Respect, I Self-Direct) programs.

## Family Care and Partnerships

Family Care and Partnership programs are federal and state funded service programs that are operated by a Managed Care Organization (MCO). Partnership programs include acute and primary health care with long term support services. Family Care offers a full range of services to help you to live in the community as independently as possible. Services are based on what you want to have happen in your adult life, called “outcomes.” Family Care provides you with a team to help

you make decisions about your services. Family Care can provide services after you turn 17 years, 9 months, even while you are still in school. Family Care is an entitlement program. If you are eligible for Family Care and want to enroll, it must be offered to you. To learn more about the Family Care program, visit <http://dhfs.wisconsin.gov/LTCare/Generalinfo/WhatisFC.htm>  
To learn more about Partnership, visit:  
<http://www.dhs.wisconsin.gov/wipartnership/2pgsum.htm>

Family Care is currently available in about ¾ of Wisconsin counties. Publicly funded long term care in counties without a Family Care program is provided through the Medicaid home and community based waivers managed by the county human services department. To view the Family Care and Partnership Program Service Area Map, visit:  
<http://www.dhs.wisconsin.gov/ltcare/generalinfo/map.pdf>

### Questions to ask about Family Care:

[Note: While these are questions about Family Care, they should be asked of the ADRC, which is the entry point for the Family Care program.]

- What types of disabilities and what ages does Family Care serve?
- How is my eligibility decided? Who does this?
- Are there financial criteria for enrollment in the program?
- Which Managed Care Organization (MCO) is managing our local county Family Care Program?
- At what age can I apply for and enroll in Family Care?
- What happens during the enrollment process as a “member” in Family Care?
- How long after enrollment do services begin?
- What do you mean when you use the word “outcomes” in deciding which services I need? Can I be very specific in explaining what I want or need?
- How much am I allowed to decide which services I want and need?
- Can Family Care be used in any environment?
- What is meant by the Self-directed Support (SDS) Program in Family Care?
- If I need a care provider in my home, do I get to decide who that should be?
- What happens to my enrollment if I am hospitalized for a length of time?
- If I need help in getting the services I want, who helps me in Family Care?
- Does the MCO direct how those services in my home are delivered and how those services are paid?
- How is Room and Board, which is taken out of my SSI, determined under Family Care and the MCO?
- Do I get to keep any of my SSI or SSDI money for myself?
- Where does Family Care funding come from?
- If my SSI or SSDI bank account has more money in it after Room and Board and the allowed personal money are taken out, can the remaining dollars stay in my bank account? (Note: If you use Medical Assistance, you are required to keep your bank account under \$2000.00 at all times.)

### **TIP!** **Family Care Program**

In 2000 the Wisconsin Department of Health Services began piloting a new program called Family Care, to provide managed long term care for elderly and adults (age 18 and older) with disabilities. Services are personalized to meet the needs of the client and are provided through a managed care organization (MCO). For more information go to <http://dhs.wisconsin.gov/LTCare/>.



- What is meant by “cost share?”
- If I am receiving an employee paycheck, do I get to keep all of the paycheck?
- Does my paycheck count against my Family Care budget?
- What happens to Medical Assistance and Medicare under Family Care?
- What is the difference between “standard” Family Care and “partially or fully self-directed” Family Care?
- What can I do if I don’t agree with the service plan developed for me?
- Can I switch programs from Family Care to IRIS or back and forth?

### **What do Family Care Programs provide?**

- Adaptive aids
- Communication aids
- Medical supplies
- Home modifications
- Home health
- Nursing services
- Therapies

- Personal care
  - Supportive home care
  - Transportation (in some situations)
  - Residential services, nursing facility
  - Supportive employment
  - Meals: home-delivered and congregate
  - Respite care
  - Adult daycare
  - Day services
  - Case management
  - Health care services (if Family Care is combined with a partnership)
- ◇ Important to know: For counties that are just starting the Family Care Program, there can be a two- to three-year waiting list for services but the waiting list under current law can NOT be any longer.
- ◇ Important to know: Family Care and IRIS replaces funding and services through the Community Integration Program (CIP) and Community Option Program (COP).

## **IRIS (Include, Respect, I Self-Direct) Program**

IRIS is a Wisconsin Medicaid funded Self-Directed Supports Program and is sponsored by the Wisconsin Department of Health Services. IRIS is available as an alternative program choice to Family Care wherever Family Care operates. In IRIS, you are able to direct your own goods, services and supports. This means you need to have the ability to do this or have someone who can help you. IRIS gives you freedom to decide how you will use a monthly budget to help meet your long term care needs. This budget is based on your needs and how you wish to meet your long term care goals and outcomes. IRIS provides you with a consultant who can help you make a plan, answer questions and remain connected to your friends and family. Bills for your services and any workers you may wish to hire are paid by the IRIS Financial Services Office. IRIS is available for you to use when you turn 18, even if you are still in school. Like Family Care, if you are eligible, IRIS is an entitlement program. To learn more about IRIS contact your local ADRC or visit <http://www.wisconsin-iris.com/>

## Questions to ask about IRIS:

- Which disabilities are eligible to receive services under IRIS?
- How do I get started in the IRIS Program?
- What happens during the application process?
- How soon can services begin?
- What is the amount of funding I have in my monthly budget?
- If my budget is too low how can it be raised?
- What is a Functional Assessment of my needs?
- Can I choose my IRIS consultant or change to a different consultant?
- Can I decide who my care providers will be?
- How are the providers I hire paid?
- How are paychecks and taxes handled?
- Can I decide how much of my budget to spend on each need?
- Am I responsible for accounting how my budget is spent? If so, how often?
- What if I don't spend my whole budget for a month, will the budget be changed for the next month?
- How are my personal care workers paid for under Medical Assistance when I'm in the IRIS program?
- What happens to my budget if I'm hospitalized for a length of time?
- How are my medical services paid for when I use IRIS?
- Can I use my IRIS budget for over-the-counter medications?
- What does the Medicaid Waiver amendment for IRIS Self-Directed Personal Care include?
- Can I live anywhere I want and still use IRIS?
- Can I use my IRIS budget to hire an agency to provide for my needs?
- Are there other agencies that my IRIS budget will cover to help me in areas where I am not independent?
- What can I do if I don't agree with the services provided on my IRIS plan?
- Can I transfer from IRIS to Family Care or from Family Care to IRIS?
- Can I choose to have my relatives be my IRIS paid providers?

## What goods and services can IRIS fund?

- Adaptive aids
- Adult day care
- Adult foster care
- Communication aids
- Community-based residential facility
- Consumer education and training
- Counseling and therapeutic resources
- Customized goods and services tailored to what I need
- Daily living skills training
- Day services
- Home delivered meals
- Home modifications
- Housing counseling
- Housing start-up
- Personal emergency response system
- Pre-vocational services (excludes sheltered workshops)
- Residential care apartment complex
- Respite
- Skilled nursing
- Specialized medical equipment and supplies
- Support broker
- Supported employment
- Supported home care
- Transportation
- Vocational futures planning

**Department of Human Services**  
**Department of Social Services**  
**Department of Community Programs**

Counties in Wisconsin are responsible for providing human and social services. In most counties these services are provided by a county department of human services. This is one county agency that delivers all public human and social services. In some counties there are two separate agencies, a department of social services and a department of community programs. In these counties the department of social services delivers economic support services, elder services, child welfare and juvenile justice services and the department of community programs delivers mental health, services, substance abuse services, and services for individuals with developmental disabilities. Counties determine which services will be provided because there is a limit for available money. A service might be mandated by law in other situations. There may also be a limit on the amount of services provided. When there are limited resources, the county will prioritize which services are most important for you.

**Questions to ask about Human Services, Social Services, or Community Programs:**

- How does this agency work? (under one umbrella or separate)
- What services do you offer?
- Am I eligible for the services in this agency?
- Am I eligible for Public Assistance (Food Share, Medical Assistance, W2, Child Care)?
- What is involved in getting a particular service started?
- Will I have a case manager? (Get the contact information.)
- How many clients does a staff person have in a program?
- When can the service begin? (at what age, before or after high school graduation)
- Where do the services take place?
- How many days a week will services be offered? What times?
- Can I use more than one service at a time? (example: supported employment AND a day service)
- Are my preferences taken into consideration?
- Is supported employment offered in the community?
- What types of jobs are currently available? How often would I go to the job each week? How many hours/days?
- Are day/work services held in one building? Together or separate?
- Are community activities offered? How often and where?
- How is transportation handled? How long is the ride?

- How are meals/dietary needs handled?
- How are medication/medical/physical needs handled?
- What are available living options? (group homes, apartments, etc.)
- What happens to my services/budget if I move out of the county? Will I have to go back on a waiting list for the new county?
- Is there a waiting list for services? How long is the waiting list?
- How long will I wait if I'm placed on a waiting list?
- How will the service be paid for?
- Is there reporting I must do?
- What role do guardians and/or representative payees have with regard to services?
- What do I do if I am dissatisfied with the services?

### **What do Human Services, Social Services, and Community Programs provide?**

- Support to help people live and work in their own homes and community
- Abuse prevention
- Prevention of exploitation or neglect
- Rehabilitation services
- Placement for treatment and services in institutions (will pay in some cases)
- Diagnosis and evaluation
- Youth delinquency services
- Youth in-home detention
- Adolescent needs program
- Treatment foster care
- Adult protective services
- Guardianship and protective services or placement
- Community integration program (CIP) – funding
- Inpatient and outpatient care and treatment
- Transition support for clients going from an institution to the community
- Residential services (group homes, supported apartment, adult family homes)
- Community support programs for people with chronic mental illnesses
- Work and activity programs

- Transportation necessary for using other services.
- Crisis services

A county is not mandated but might consider providing the following: information and referral services, education, recreation, and counseling services for individuals with developmental disabilities. When a county has a Family Care program, Human Services is one of several agencies that Family Care may choose to contract with to provide services.

## **Social Security**

The Social Security Administration (SSA) is the agency where you can apply for income resources. Social Security is a program of the federal government. The purpose of Social Security is to provide income to people who are unable to work at a substantial level because of a disability, or who are retired. For more information on any of the programs listed here, including benefits payable and income limits, call 1-800-772-1213 (TTY 1-800-325-0778) or visit the website [www.socialsecurity.gov](http://www.socialsecurity.gov). To locate your local Social Security office online, visit: [www.socialsecurity.gov/locator](http://www.socialsecurity.gov/locator).

### **Questions about Social Security:**

- If I already receive Social Security benefits, why do I need to reapply for Social Security when I reach age 18?
- How do I apply for Social Security benefits?
- What programs am I eligible for?
- How long will the program last?
- What income limits, if any, are necessary to qualify for the program?
- What counts as income or assets/resources?
- What records need to be kept and where?
- Who must see these records? When? Where?
- Does someone provide training in record keeping?
- Does someone provide training to fill out the necessary forms?
- Is there a way to receive both Medical Assistance and Medicare?
- How is Supplemental Security Income (SSI) affected if I have paid employment?
- Will I be able to keep Medical Assistance if I earn too much money?
- What happens if I make a mistake in reporting my finances?
- What happens if I go over the income limit in any one month?
- How can an SSI check be kept safe from theft or loss?
- Are there limits on how an SSI payment can be spent?
- Is there an appeal process if problems occur?

## Social Security Programs:

- Social Security (SS) - referred to as Retirement, Survivors, Disability Insurance (RSDI): Benefits paid to a worker who has worked, paid into Social Security, and retired. Social Security also pays benefits to a surviving spouse, child, or dependent with disabilities when a worker dies.
- Supplemental Security Income (SSI): Benefits paid to individuals who are blind or have severe disabilities and have limited income and resources.
- Wisconsin's Supplemental Security Income Exceptional Expense Supplement (SSIE): Benefits are paid if an individual qualifies for SSI and has long term support needs (ask about SSIE at your county Social Services or Human Services Department).
- Medical Assistance (MA or Medicaid): Benefits that cover the majority of costs for medical needs and medications if not eligible for Medicare Part D, or if Part D does not cover certain medications. People on SSI automatically receive MA in Wisconsin.
- Social Security Disability Insurance (SSDI): Benefits paid to those who have worked and paid into Social Security but can no longer work because of a disability. This program requires the individual to have worked long enough (and have enough work credits) to qualify. After a parent retires or dies, a child with a disability (already receiving SSI) may receive SSDI. Twenty-four months after qualifying for SSDI, the child will receive Medicare. Exceptions to the 24-month rule include persons with chronic kidney disease or Lou Gehrig's Disease. These individuals may qualify for Medicare immediately. Some individuals will qualify for both Medicare and Medical Assistance. Medicare offers coverage for prescription medication through Medicare Part D as of January 2006. Information on filing for SSDI can be found at [www.socialsecurity.gov/onlineservices](http://www.socialsecurity.gov/onlineservices).
- Plan for Achieving Self-Support (PASS): This program allows a person with a disability to set aside money in a separate bank account. This money (wages, SSDI, trust fund) is set aside for a specific work goal and must be used within a specific time frame. PASS is a benefit used to help a person become self-supporting. Money saved under PASS does not count against your resource limit or when the government is calculating how much SSI can be provided. For more information on PASS, visit [www.socialsecurity.gov/work](http://www.socialsecurity.gov/work).
- Impairment-Related Work Expense (IRWE): This program deducts the cost of certain impairment-related items and services (needed to do work) from gross earnings. Items and services must be of reasonable cost and must not have been paid for from other funding sources. Examples of items/services are attendant care services, transportation costs, work-related equipment, service animals/animal care, routine medical drugs/supplies, and home, van or car modifications needed to allow you to work.
- Ticket to Work is another program and is explained later in this document.

[Note: All youth who receive SSI under the childhood disability criteria are required to have an eligibility determined again under the adult criteria upon reaching age 18.]

## Vocational Rehabilitation

Vocational Rehabilitation (VR) helps individuals with a disability to obtain, maintain, and improve their employment opportunities. The state office that provides this help is called the Division of Vocational Rehabilitation (DVR). The state DVR office can be reached by calling 800-442-3477 or TTY 888-877-5939. For more information on DVR, visit <http://dwd.wisconsin.gov/dvr/>.

There are many local offices in Wisconsin. A vocational counselor works in each office. This counselor will help you decide if DVR can help you.

### Questions to ask about the Division of Vocational Rehabilitation:

- Are all students with IEPs eligible for DVR services?
- Can students who are not in special education receive transition services from school or DVR?
- Can DVR provide services while I am still in school?
- Who pays for DVR services?
- What if I don't know what kind of job I want?
- What is the role of the DVR counselor?
- Should the DVR counselor always be invited to IEP meetings?
- When should the DVR counselor be included in IEP planning?
- If a student has severe disabilities and the county will be responsible for long term services, does DVR still become involved? How?
- What determines how I am placed on the DVR waiting list?
- How do I know if DVR will provide a vocational evaluation?
- Does DVR pay for work experiences?
- How is it decided if DVR will pay for supported employment services for my Individual Plan for Employment (IPE)?
- Are DVR staff required to participate in the IEP meeting to develop employment goals?
- Who decides what is actually written into my IPE? Who has the final decision?
- How long do DVR services last?
- What can be done if I (or my family) is not satisfied with DVR services?

## How do I know if I am eligible for VR Services?

You are eligible for VR services if:

- your disability keeps you from getting or keeping a job that uses your skills and abilities, AND
- you require Vocational Rehabilitation services to help with your disability limitations so you can reach your job goal.

### What is “Order of Selection?”

Vocational Rehabilitation must use a waiting list process called “Order of Selection” when it does not have enough resources (funds or staff). If you are eligible for services, you may be placed on the waiting list. DVR has 60 days to let you know if you are “eligible” for services. DVR will contact you when they are able to work with you.

“Order of Selection” is a process DVR uses to first help people with the most significant disabilities. An individual with a significant disability has a severe physical or mental impairment that seriously limits one or more functional capacities in terms of an employment outcome and whose vocational rehabilitation requires multiple services (two or more) over an extended period of time. Functional capacity takes into consideration limitations that affect mobility, communication, self-care, self-direction, interpersonal skills or acceptance, work tolerance, and work skills.

Persons with significant functional limitations may require long term employment services from the county in which they live. Often counties do not have enough money in the budget to provide long term employment support. DVR will need to identify the long term source of funding before it can provide employment services. This identification will need to be in place before supported employment services are provided. Apply to your county human services for long term support for employment. If your county has Family Care or IRIS programs, these may also provide long-term employment support. Other supports DVR may use include client self-pay and natural supports (employer / employees assist the client on the job).

### TIP!

Your disability must be documented by a professional (doctor, psychiatrist).



## TIP!

If you receive SSI or SSDI, you are presumed eligible for DVR services.

### How do I apply for DVR services?

You can pick up a DVR application from your school or your local DVR office. DVR can also mail you an application and information. Fill the application out and send it or bring it to the DVR office. DVR staff will contact you to set up an intake appointment to gather information and explain DVR services. You will need to bring your disability information to DVR or sign release forms so DVR can get your disability records. You should apply for DVR services even if you don't have complete disability information. DVR can be asked to pay for a disability evaluation. You should apply when it looks like you will need services or no later than two years before graduation. For a map of DVR office locations visit <http://dwd.wisconsin.gov/dvr/locations/default.htm>.

### What services does DVR offer?

DVR has many services that can help you reach your employment goal. Services are individualized and based on your rehabilitation needs. You will work with your DVR counselor to identify those needs. Some of the services include counseling and guidance, assessments, job search and placement, technology (including telecommunications), training, work tools/clothing, and transition services.



All services must be directly related to achieving your vocational (employment) goal. DVR will work with you to develop an Individual Plan for Employment (IPE) if you are eligible and they are able to begin services. You and the DVR counselor will work collaboratively to develop your employment goal and plan what needs to be done to reach your goal. This may include the need for supported employment.

### **Can I expect my school to help me with DVR?**

Your school organizes meetings and arranges and monitors services for students in special education. The school must have written consent from you (if you are over age 18) or your parent/guardian in order to refer you for DVR services; however, you or your parents must apply.

DVR should be invited to all the Individual Education Program (IEP) team meetings if you are eligible for services. Your post-school employment goals should be discussed. It is at the IEP meeting that an IPE is developed. The goals of this plan should look the same as the vocational/employment goals in your IEP. Both plans should state the services you will need to reach your employment goals. The IEP and IPE are reviewed at least once each year. If a student is on the "Order of Selection" waiting list or has not yet applied for DVR services, the role of the DVR counselor will be limited to technical assistance and consultation. The counselor will not be able to commit to services in student has not yet applied or been deemed eligible.

There is a Client Assistance Program (CAP) through the Department of Agriculture, Trade and Consumer Protection that provides a way to voice DVR concerns and complaints. Contact this office by calling: 800-362-1290 or by writing to CAP, P. O. Box 8911, Madison, WI 53708-8911.

### **How does the Inter-Agency Agreement help me to plan?**

The purpose of this DPI/DVR/DHS Interagency Memorandum of Agreement (MOA) is to promote the creation of coalitions among the state, counties, and providers to better connect and serve student with disabilities eligible for adult services.

This Interagency Memorandum of Agreement (MOA) is intended to clearly define necessary relationships, policies, and procedures between DVR, DPI, and DHS in order to create common understandings and establish collaborative efforts regarding services that will ultimately improve employment outcomes for individuals with disabilities.

The Transition Action Guide (TAG) was developed to support the Interagency Agreement with suggestions of best practices and resources to assist key stakeholders (students, parents/guardians, teachers, counselors, case managers, etc.) involved in the transition process. This tool can be used as a framework to plan for services, to improve communication, coordination, and services for students with disabilities transitioning from school to work. For additional information, visit <http://dwd.Wisconsin.gov/dvr/tran.htm> or the WSTI website at [www.wsti.org](http://www.wsti.org).

### **TIP!**

Ask your school to invite a DVR staff person to your IEP meeting to explain services and how to apply.

## Job Centers

### Job Accommodation Network

The Job Accommodation Network (JAN), provides accommodation information to assist in the hiring, training, retention, and career advancement of individuals with disabilities. JAN offers:

- Individualized workplace information for the employer, client, and customer
- Americans with Disabilities Act (ADA) information
- Service and contact information for disability service organizations and agencies
- Individualized counseling based on client limitations and the specific accommodations needed to perform job functions in the work environment

JAN services are free. Information is available in Spanish, Braille, large print, audio tape, diskette, and CD-ROM. For more information call 800-526-7234 (voice); 877-781-9403 (TTY); or visit <http://askjan.org/>.

### Ticket to Work

The Ticket to Work Program is a Social Security Administration (SSA) program for individuals with disabilities who want to work. It provides you with a variety of choices as you look for employment, vocational rehabilitation, and other support services. You receive an actual "ticket" (about 6" by 9" in size) with your personal information on it. The "ticket" also has the date you received it. This "ticket" can be used to get services from a registered Employment Network (EN), which can include private agencies and the Division of Vocational Rehabilitation (DVR). You can choose whether you want to use the "ticket." In Wisconsin there are 28 different private ENs (as of 2008) that can be used for vocational services to assist you in coming up with a plan designed to help you reach your work goals.

The agency or private organization develops an Individual Work Plan (IWP) for you at no cost. You can find out more about the private employment networks by calling the Maximus Company at 866-968-7842, or visiting online: <http://www.yourtickettowork.com>. More information on Ticket to Work can also be found at: <http://www.socialsecurity.gov/work/>.

To be eligible for Ticket to Work you must be:

- 18 through 64 years of age;
- eligible for benefits under the adult disability criteria (if you receive SSI);
- currently receiving a federal cash benefit from Social Security; and
- have a disabling impairment which falls within the classifications of the Social Security Administration. While you are using a ticket, social security will not conduct regularly scheduled continuing disability reviews to see if your disabling condition has improved.

## Private and County Managed Vocational Services

These can be found in many counties. Check with your Community Service Agency or your ADRC for information on services available.

## Independent Living Centers

### Where can I get help to assist me in living independently?

Independent Living Centers (ILCs) help you lead productive lives in the community. You will want to learn how to take control of your life and become independent. ILCs can assist you as you make your own decisions and choices. ILCs can help you prepare for a full range of social roles. There are eight ILCs throughout the state serving every county. Not all ILCs have the same services and may specialize in specific services. All ILCs have the following four services:

- Information, assistance and referral
- Peer support/counseling
- Individual, systems and civil rights advocacy (this includes public education advocacy)
- Independent life skills training

Services typically offered by ILCs may include:

- Personal care attendant recruitment and placement
- Financial benefits counseling
- Equipment loan
- Assistance in locating accessible and affordable housing
- Career development, training and placement
- Community education, consultation and training
- Recreation

Independent Living Centers serve all ages and all disabilities. To locate the center in your area, contact the State Independent Living Council of Wisconsin at 608-256-9257, or the Wisconsin Coalition of Independent Living Centers at (608) 444-3842. For more information on locating your center, visit the Wisconsin Coalition of Independent Living Centers' website: <http://www.il-wisconsin.net/>.

## **Housing Agencies**

### **Where can I get information about housing?**

Important to Know: There are a variety of options to explore, including rentals, home ownership, or holding housing in trust; however, limited income (not just disability) is also one of the criteria for eligibility for most housing programs.

### **Where do I get information on renting?**

Housing Authority (local) - Look in the "local government" listing in the telephone book for the "Housing Authority." Representatives will have information on rental assistance programs.

Independent Living Centers (ILCs) - ILCs are a good source of information for rental housing options for individuals with disabilities. For referral to an ILC, call 608-256-9257 or 866-565-4010 or visit <http://www.il-wisconsin.net/>.

### **Where do I get information on owning a home?**

Movin' Out, Inc. - This agency provides information, referral, housing counseling, down payment assistance, and rehabilitation funding to eligible households. Call toll free 1-877-861-6746 or visit:

<http://www.movin-out.org/>.

Local Community Action Program (CAP) - This agency is a voluntary association of Wisconsin's 16 Community Action Agencies (CAAs) and 3 special purpose agencies that have state-wide anti-poverty mission. They provide information, and may be a source of financial assistance. Call 608-244-4422 or visit: <http://www.wiscap.org/>.

### **Where do I get information on a Housing Trust?**

This is an option for families who want to secure the family home for an individual with a disability. Movin' Out, Inc. can be contacted for information on Housing Trusts.

Household Housing Guide - This guide provides public sources of housing, financial, and information assistance for low to moderate income households in Wisconsin. Write to Division of Housing and Community Development, Department of Commerce, P. O. Box 7970, Madison, WI 53707-7970 or visit: <http://commerce.wi.gov/CD/docs/BOH-Fact-Sheets/cd-boh-housing.pdf>.

WI Front Door Housing - This organization matches landlords with vacant rentals with those seeking rental units (including units with different levels of accessibility). Visit: <http://www.wifrontdoorhousing.org>

## **Private Agencies**

Private agencies can be either for-profit or not-for-profit agencies. These agencies are not supported by tax dollars so you must pay for services. Sometimes public agencies (supported by tax dollars) will sub-contract with private agencies to provide services. Students/families can privately contract with these agencies.

Private agencies can offer a variety of services, such as supported employment, day services, community activities, housing/group homes, transportation services, and personal care workers. Individuals will need to pay for these services and they can be very expensive. It is important to apply for state and federal funding long before private agency services need to be used.

## Life Span Training

You and your family need to plan for the services you will need in the future. It is important to write a plan and keep it in a file at home. This plan will also help anyone who may need to give you assistance if your family is no longer able to do so. A will or trust should also be prepared. A will or trust rarely carries out all the plans that should be made for the future. For this reason a life plan should be developed and frequently updated.

### Letter of Intent (Family Generated)

One way to put a life plan into writing is to write a "Letter of Intent." This is a nonlegal document that explains the ideas, hopes, and desires for the student with a disability. It should include:

- Statistics (name, social security number, birth date/place)
- Financial arrangements (banking, insurances, burial trusts)
- Information about the family
- Documentation of medical history and card
- Documents regarding legal guardianships, trustees, representative payees, and powers of attorney
- A section on the child's strengths and also areas of challenge
- Housing preferences
- Daily living skills, education, day programming
- Daily routines
- Employment needs/desires
- Religion and values
- Recreation needs and desires
- Final plans (funeral and burial)

The "Letter of Intent" is addressed "To Whom It May Concern" and states: "These are the plans for my/our son or daughter. Please help me carry out these plans." It is important to discuss all areas of life (health, insurances, education, living arrangements, employment opportunities, recreation, faith-based practices, etc.). The letter should include what has happened so far and desires for the future.

The "Letter of Intent" should be signed and dated. Each year the letter should be updated. This document can be used in meetings with estate planners, attorneys, and other agencies.



# Appendix

I. Guardianship .....	34
II. Roles and Responsibilities .....	38
III. Sample Agency Letters .....	43
IV. Sample Agency Phone Call Interview .....	46
V. Possible Members of the Transition Team .....	47
VI. Opening Doors Series Order Form .....	49

---

# Appendix 1 - Guardianship

A guardian is an individual or corporation appointed by a court of law to make decisions for another individual (called the “ward”). Parents and others do not automatically become guardians of an individual with a disability when he/she turns age 18. In order to have a legally authorized decision-maker for another person, the court must be petitioned for a guardian to be appointed.

In 2006, Guardianship laws changed to new Chapter 54 and totally reformed Wisconsin’s “old” guardianship law under Chapter 880. For more information on the new Chapter 54, see [www.legis.state.wi.us/statutes/stat0054.pdf](http://www.legis.state.wi.us/statutes/stat0054.pdf)

Guardianship may be applied for when the student (called the “ward”) turns 17 years and 9 months. It generally takes one month for the application and court process to be completed. To ensure that the student who requires guardianship has completed the guardianship process and has an appointed guardian when he/she becomes the “Age of Majority” (age 18), begin application as soon as possible.

## Things to Consider

- Guardianship is a legal responsibility and takes care and time.
- Guardianship involves organizational skills, record keeping, and reporting.
- Guardianship can involve penalties to the guardian or individual with a disability if the rules regarding SSI are not followed.
- Guardianship takes money to set up - attorney, doctor, court fees, up to \$2000 - \$3000 which is paid by the guardian or the ward.
- Either limited or full guardianship may be necessary if the individual does not have the mental capacity to make decisions or protect themselves from harm.
- Guardianship may include protective services or protective placement. Protective services is a court order mandating the provision of specified services. Protective placement is a court order stating in what type of residential environment an individual must live. Visit [www.legis.state.wi.us/statutes/stat0055.pdf](http://www.legis.state.wi.us/statutes/stat0055.pdf) for new Ch. 55 as amended by 2005 W.A. 264.

## Types of Guardianship

- A guardian of the person exercises the rights for an individual who is unable (on turning 18 or older) to make personal decisions. Guardianship of the person must be in place (by age 18) or parents will need a signed consent from the student for any release of information from an agency (including educational or medical). Ch 54.10(3)(a)(2)
- A guardian of the estate exercises the rights for an individual who is unable (on turning 18 or older) to make financial decisions. Ch 54.10(3)(a)(3)

These guardianships can be FULL or LIMITED. The court makes a decision based on the areas of incompetence and the severity of the need.

Note: For the court to appoint either guardian of the person or guardian of the estate, the court must find that there is no less restrictive means of meeting the need of assistance (such as Power of Attorney) Ch 54.10(3)(a)(4)

A guardian can be both Guardian of Person and Guardian of Estate.

### Limited guardianship

The person with the disability may maintain the right to:

- Vote
- Marry
- Sign contracts
- Hold licenses
- Consent to sterilization, abortion, birth control, sexual contact
- Travel/decide where to live
- Make or alter a will
- Access or release confidential records
- Limit the amount of guardianship of the estate
- Manage a portion of their finances

## Full guardianship

The above rights are lost to an individual with disabilities under full guardianship.

The court may also decide that the individual with a disability may make certain decisions but only with the consent of the guardian. These include the right to:

- Marry
- Apply for a driver's license or hunting license
- Consent to sterilization
- Consent to organ, tissue, and bone marrow donation

The process to have a guardian appointed usually entails:

- An evaluation by a licensed PHD or MD to determine if the mental incapacity meets the standards of "incompetency."
- Filing a petition with the court requesting the appointment of a guardian.
- The court will appoint a Guardian ad Litem (GAL). The GAL is an attorney who will complete an investigation and make a recommendation to the court on what he/she determines is in the proposed ward's "best interest."
- Appropriate notices are sent to all interested parties.
- A court hearing is held where the evidence and recommendations are presented to the judge.
- The judge makes the ruling on appointment of guardian.

Remember there are alternatives to full guardianship if the adult child only needs assistance with some decision making.

## Alternatives to Full Guardianship

- Limited guardianship
- Power of attorney over bank accounts  
(Note: joint bank accounts are not recommended)
- Durable power of attorney over part or all of the adult child's finances  
(Note: An individual with a disability must have sufficient mental capacity to understand and sign a power of attorney document.)
- Power of attorney for health care  
(Note: An individual with a disability must have sufficient mental capacity to understand and sign a power of attorney document.)
- Conservatorship: A court appointed person who has the same power as a guardian of estate but there is no finding of incompetence; the person with a disability must request the conservatorship.
- Trusts. Living Trusts and Irrevocable Living Trusts: An attorney who understands the finances and state funding (SSI and Medical Assistance/Medicare) for individuals with disabilities should be involved.

- Representative payment: Adult child is incapable of managing Social Security, SSI, or retirement benefits. Government agency appoints a “representative payee” to receive checks and use them for the benefit of the adult child. There are reporting requirements; records of spending must be kept on behalf of the client.

Additional Information on Guardianship can be obtained by calling the Guardianship Support Center Hotline, Elder Law Center of the Coalition of Wisconsin Aging Groups: (800) 488-2596 or by visiting <http://cwagwisconsin.org/elder-law-center/guardianship-support-center/>.

*Understanding Guardianships: A Handbook for Guardians* can be obtained by visiting <http://www.legalexplorer.com/resources/database/PubPDFs/74-UNGUARD.pdf>

Additional Legal Resources can be obtained by visiting <http://www.legalexplorer.com/resources/booksearch.asp>

# Appendix II - Roles and Responsibilities

## Student Roles and Responsibilities (examples):

- Attend all my Individual Education Program (IEP) team meetings
- Learn how to be an active participant in my IEP meetings
- Share my thoughts and be part of all discussions about me
- Talk to my teachers about who should attend the IEP meeting(s) and why
- Obtain contact information for each agency or person who should attend my IEP meeting from my teacher
- Provide signed permission/consent to needed agencies or persons so they can attend my meetings and work with me and/or my parents/guardian.
- With the help of my teachers, invite agency representatives to my IEP team meeting.
- Talk to my teacher and parents/guardian about my interests and possible post-school goals
- Work with my transition team to develop my goals for working and living after I leave school
- Think about what I want to do for a career or job when I am done with school and why
- Help my IEP team decide how agencies and others might help me work toward my goals.
- Ask questions I may have to make sure I understand my role in my program
- Determine what I can do now, and in the future, to achieve those goals
- Complete activities that we agree will help me achieve my goals
- Apply for programs, services and/or supports that will help me achieve my goals
- Work with these programs and services to help me achieve my goals
- Review progress with my transition team at least annually
- Keep a file on all school records

## Parent/Guardian Roles and Responsibilities:

- Help the student explore his/her interests related to post high school continuing education possibilities, daily living and working
- Become familiar with educational institutions and service agencies/ providers that may be of assistance to the student; understand which services each provides.
- Learn about the eligibility criteria of each education agency and service agency/ provider

- Give permission (if student is under age 18 or if the guardian) for agencies/ service providers who may help the student achieve his/her goals to attend school meetings and work with the student.
- Invite the appropriate agencies/ service providers to the IEP meetings (as much in advance as possible).
- Help the student develop his/her goals, beginning at age 14 or earlier if appropriate, for post-school education, working and living once high school is completed.
- Attend all IEP team meetings and share your thoughts; be an active participant in all discussions (be aware of the student's legal rights at the 'Age of Majority' – age 18).
- Yearly or more often if needed, review the student's interests and goals with the student in advance of the IEP team meeting to explore needed or desired changes so these can be discussed with the IEP team.
- Help the student determine what can be done now, and in the future, to achieve his/her goals.
- Ask questions as needed so you stay informed and remain knowledgeable about the progress the student is making in the transition process
- Assist the student to complete activities that will help him/her achieve the goals
- Help the student understand choices and apply for programs/ services that will help him/her achieve desired goals
- Be knowledgeable about the 'Age of Majority' laws that address the student's adult rights at the age of 18
- Ensure that school goals and services are coordinated between plans such as the Individual Education Plan (IEP), Individual Plan for Employment (IPE) and other service programs
- Keep an updated file on all school records, including current documented proof of disability and the Summary of Performance in the last year of high school.
- Request in writing that the school keep a copy of the student's file beyond one year after graduation

### **Teachers and/or School Team Member Roles and Responsibilities:**

- Maintain knowledge of state and federal laws concerning Transition
- Maintain updated knowledge of community agencies/ services available to the student throughout the transition process
- Assist the student to learn how to fully participate in the IEP process and encourage this participation at the IEP team meeting whenever possible

- Help the student identify who should be invited to the IEP meeting
- Assist the student in providing consent for agency IEP participation and invitation to attend.
- Provide explanations of agency services and eligibility criteria when a requested agency representative is not able to attend an IEP team meeting
- Assist in developing alternative methods to provide agency services when an agency does not fulfill its' commitment to provide services entered in the IEP
- Help the student explore his/her goals for post-secondary education, work and living arrangements after high school
- Share knowledge of the student's skills and challenges
- Starting at age 14 or earlier if appropriate, help the student identify his/her annual IEP goals for education, work and living skills after high school
- Help determine what can be done now or in the future to help him/her achieve those goals
- Help the student complete activities that will help him/her achieve desired goals
- Notify the student and parents/guardian of the 'Age of Majority' (age 18) laws
- Help the student review choices and apply for appropriate services such as the Department of Vocational Rehabilitation (DVR) and the Department of Human Services (DHS) or the Aging and Disability Resource Center (ADRC) that may assist him/her to achieve goals
- Evaluate the student's progress towards achieving post school goals and update IEP annually
- Provide the student and parent with a summary of the student's performance (SoP) in the student's last year of school

**Division of Vocational Rehabilitation (DVR) Representative Roles and Responsibilities (at least two years prior to graduation):**

- Provide outreach to students
- Explain its mission to help students and adults with disabilities obtain, maintain and improve employment opportunities
- Respond to IEP meeting requests
- Attend IEP meetings when invited and available (at least two years prior to graduation)
- If not able to attend, provide information on DVR services and eligibility criteria to students, their parents, and other stakeholders appropriate
- Establish and maintain channels of communication with school personnel

- Provide information on DVR services and eligibility criteria to students, parents/guardians, and other stakeholders as appropriate through various means (presentations, brochures, IEP meetings, and Employment Planning Consultation)
- Share thoughts and be part of the IEP discussion occurring
- When requested provide an application for services and determine eligibility for services
- Provide assessments to determine the type of work the student would like and how to obtain it
- Help the student develop his/her work goals for after school
- For students found eligible, develop the Individual Plan for Employment (IPE) at the meeting to ensure it aligns with the student's IEP
- Help determine what the student can do now and in the future to help him/her achieve their goals.
- Coordinate services with the school and other stakeholders as appropriate for students found eligible for DVR services
- Provide services agreed to and listed in the IPE
- Provide consultation services as needed and appropriate
- Help ensure the student is making progress towards his/her goals and review the IPE with appropriate stakeholders annually

**County Case Managers, Child Service Workers, and Mental Health Professionals Roles and Responsibilities (at least two years prior to graduation or no later than 6 months before age 18):**

- Establish and maintain open channels of communication with schools and school district personnel for the purpose of informing and sharing information with teachers.
- Respond to IEP meeting requests
- Attend IEP meetings when invited and available
- If not able to attend, provide information on program and eligibility criteria to students, their parents, guardians, and other stakeholders as appropriate
- Be an active participant in the transition process for students, as appropriate, including in the development of the post-school goals
- Assist other stakeholders in determining when and where a referral for services would be appropriate
- Provide information on program and eligibility criteria to students, their parents/guardians and other stakeholders as appropriate
- Share thoughts and be part of the discussion occurring

- When requested provide an application for services and determine eligibility
- Provide information about resources, services and supports available in the county, now and into the future
- Help determine what the student can do now and in the future to help him/her achieve chosen goals
- Stay informed about the student's progress towards achieving post school goals
- For students found eligible, work with other stakeholders, such as Family Support Programs, Children's waivers, Mental Health services and Long Term Care providers to plan and coordinate services, as appropriate
- For students found eligible, provide long term funding and services

### **Representatives of Aging and Disability Resource Center (ADRCs) Roles and Responsibilities (apply at the age of 17 years and 6 months):**

- Establish and maintain open channels of communication with schools and school district personnel for the purpose of informing and sharing ADRC information with teachers and student interdisciplinary teams
- Explain and describe the array of available services and support options so that students, school staff, parents/guardians, and other stakeholders may make informed choices when planning post-school activities, services and supports
- Provide individual information and options counseling to students and parents/guardians so that they can assist the student in identifying and selecting the best options for living as adults.
- Determine disability, functional and financial eligibility for long term care services and supports that may be provided during the school-to-adulthood transition period (for 18-21 year olds) and in adult life
- When invited to the IEP team meeting, share information about post-graduation options, as appropriate, that will foster the identification and development of post-school goals
- Encourage students and their families to become familiar with ADRC information, services and supports available prior to and after graduation
- Provide benefit counseling to help students, parents, and guardians understand and apply for private and publicly funded benefits (such as Medical Assistance and Medicare)
- Assist in identifying and planning for the best services and supports that will meet the student's outcomes
- Educate all stakeholders about eligibility for long term supports and services, including Self-Directed Supports (SDS) when the student is 18 or older

# Appendix III – Sample Agency Letters

## Sample Letter to Agency Representative:

(Date)

(Name/ Address)

Dear \_\_\_\_\_:

As we discussed during our telephone conversation on \_\_\_\_\_ (date), we have identified your agency as one which is critical to assist in the planning of transition services for (one of our students or my son/ daughter). We would like to have you assist in developing a plan to meet the post-school goals and needs of (this student or my son/ daughter). As a member of the IEP team, we will ask you to explore the services, support, and/or programs that your agency might be able to provide in the transition of (this student or my son/ daughter) to help him/her realize his/her post-secondary goals.

We have scheduled an Individual Education Program (IEP) team meeting for \_\_\_\_\_ (student's name) on \_\_\_\_\_ (date), \_\_\_\_\_ (time), at \_\_\_\_\_ (location).

During this meeting, based on \_\_\_\_\_ (student's name) needs, preferences, and interests, there will be discussion on:

- \_\_\_\_\_ 's (student's name) post-school goals and need for post-school services, support, or programs.
- A plan for the next \_\_\_\_\_ (4, 3, 2, 1) year(s) that describes the student's post-school goals and the courses, activities, agencies, and people who will help him/her achieve these post-school goals.
- Determination of courses, school and community activities, and supports that will help the student achieve his/her goals after high school.

Along with \_\_\_\_\_ (student's name), other individuals invited to attend this meeting are:

Name \_\_\_\_\_ Position/ Agency

Name \_\_\_\_\_ Position/ Agency

Name \_\_\_\_\_ Position/ Agency

Name \_\_\_\_\_ Position/ Agency

Please let me know whether the date and time are convenient for you by contacting me by telephone at \_\_\_\_\_, by email at \_\_\_\_\_, or by returning the attached response slip.

If you are unable to join us, please let me know the best way to engage your agency in planning for the transition services that will meet \_\_\_\_\_'s goals.

We appreciate your time and commitment to establish the linkages with your agency to enable \_\_\_\_\_ (student's name) to attain his/her personal and professional goals.

Thank you,

Sincerely,

(Name/Title)

## Sample Agency Representative Response to IEP Team Meeting Invitation:

( ) Yes, I will attend the IEP team meeting on \_\_\_\_\_ (date) at \_\_\_\_\_ (time) in \_\_\_\_\_ (location).

( ) Yes, I would like to attend \_\_\_\_\_'s (student name) IEP team meeting, but please contact me at the following telephone number \_\_\_\_\_ to reschedule.

( ) No, I would not like to attend the IEP team meeting, but I wish to share my input about

\_\_\_\_\_ 's (student's name) long-term post-school interests and goals with you prior to the meeting and assist with planning for his/her future. Please contact me at the following number: \_\_\_\_\_.

Signature

Date

## Sample Parent/Student Letter to Agency Providing Permission to be Involved in Meetings and Services:

(Name of parent/guardian, if student is under age 18)

(Name of student)

(Address and contact information)

(Date)

Dear \_\_\_\_\_ (Agency) Representative,

I am inviting you to participate in helping us plan transition goals for

\_\_\_\_\_ (student's name). We give you formal permission to be involved with sharing information about your services and/or attending school meetings (i.e., IEP team meetings) for \_\_\_\_\_ (student's name). We are appreciative of the assistance and service you may be able to provide in the preparation for his/her adult future.

Sincerely,  
(Name)

## Sample Follow-up Letter to Agency Representatives:

**(Edit to fit the particular conditions of the student's IEP meeting; and if sent by the school, print on school letterhead.)**

(Date)

(Name/Address)

Dear \_\_\_\_\_:

Thank you for attending \_\_\_\_\_'s (student name) IEP team meeting on \_\_\_\_\_ at \_\_\_\_\_. As we agreed, the linkages with your agency and the commitment of the agency's resources are a critical component of \_\_\_\_\_'s (student name) transition plan to assist him/her achieve his/her post-secondary goals.

During the meeting, we agreed that \_\_\_\_\_ will be responsible for providing or paying for the following transition services according to the timeline indicated below:

Type of transition services to be provided:

Starting and ending date for services:

Name of service provider:

Thank you for agreeing to provide the services listed above. We will be in contact with you on \_\_\_\_\_ (date/time) to discuss the provision of these services and determine next steps for working together to help \_\_\_\_\_ (student name) transition from school to adult life.

If you have any questions or concerns, please feel welcome to contact me by mail at the address above, by phone at \_\_\_\_\_ or by email at \_\_\_\_\_.

Sincerely,

(Name/Title)

# Appendix IV – Sample Agency Phone Call Interview

## Sample Agency Phone Call Interview Guide:

### (Keep a record of the agencies you have contacted)

Name of agency / organization \_\_\_\_\_

Name of person you spoke to \_\_\_\_\_

Date contacted \_\_\_\_\_

Position \_\_\_\_\_

Address \_\_\_\_\_

Email address \_\_\_\_\_

Phone number \_\_\_\_\_ FAX \_\_\_\_\_

#### Sample phone script:

Hello, this is \_\_\_\_\_. I am a (parent, teacher, coordinator, etc.) of a young adult who is (or if you are the student, then "I am") \_\_\_\_\_ (exploring options, exploring where to live after graduation, interested in a recreational program or whatever fits your need). I am looking for information to help in planning for my (own, son/daughter, family member, student's) future. I found your agency/organization through \_\_\_\_\_ (another agency, yellow pages, brochure, etc) and I am interested in learning more about what services you provide (or what your agency/organization does). Could you tell me who in your organization I could talk to about this? Thank you.

Key questions to ask (also refer to questions provided in Opening Doors - A Guide to Adult Services):

- Who do you serve?
- What services do you offer?
- How does one get involved with your agency/organization?
- Are there special eligibility requirements?
- Do you have any ideas about how your agency/organization might help meet a need such as: (describe a specific problem or need).
- Can you refer me to some other people, agencies/organization that might offer some services to meet this need?
- Do you have any written materials describing your agency/organization and if so, would you please send them to me \_\_\_\_ (name) at \_\_\_\_ (address)?
- Is there a time in which I could come and meet with you for more information?

Thank you for speaking with me today. This information is very helpful in planning my (own, son/daughter's, student's) future. I'll be in contact with you soon (if that is needed). Good bye.

# Appendix V – Possible Members of the Transition Team

## Possible Members of the Transition Team

**(Descriptions are not all inclusive of services that may be provided)**

- Adult Education Representative – provides information about life-long education options.
- Advocacy Organization Representative – may offer self-advocacy training or support group for youth or advocacy support for student/parents/guardians.
- Aging and Disability Resource Center Representative – offers information and resources on long term support services; door to Family Care and IRIS.
- Assistive Technology Representative – provides expertise on devices that can open doors to opportunities.
- At-Risk Prevention Specialist – offers counseling and support on teen pregnancy, alcohol and drugs.
- Business-Education Partnership Representative – provides links between schools and local businesses and industry.
- Community Action Agency Representative – may link team to resources for traditionally underrepresented groups.
- Community Center Representative – provides information on programs and opportunities in the community.
- Correctional Education Staff – provides incarcerated youth with continued learning opportunities.
- Drop-out Prevention Representative – provides youth with alternatives to dropping out of school.
- Employer – offers insight into expectations; promotes hiring of individuals with disabilities.
- Employment Specialist – provides job development, placement, coaching.
- Extension Service Agent – offers programs in parenting, homemaking, and independent living.
- Family Care Representative – provides information on long term support living options.
- Guidance Counselor – provides information on curriculum, assessment, graduation requirements, and college.
- Health Department/School Nurse – provides guidance on community health services and health care advice.

- Higher Education Representative – provides information on postsecondary services to students with disabilities.
- Housing Agency Representative – assists in developing housing options.
- Human Services Representative – provides crisis services, information and/or services for individuals with disabilities, adult protective services, guardianship, funding programs.
- Independent Living Center Representative – provides information and services for financial benefits counseling, peer counseling, independent living training, personal care placement, and advocacy.
- IRIS (Include, Respect, I Self Direct) Representative – provides information and services for long term support under a Self-directed Support System (SDS).
- Leisure Program Representative – knows available program options within the community.
- Literacy Council Representative – coordinates volunteers to teach basic reading and writing skills.
- Local Government Representative – funds many local services, can provide information on local services
- Local Disability Representative – provides information and training; often serves all disabilities, not just one.
- Parent Training and Information Center Representative – provides training on transition planning and advocacy services to families.
- Parks and Recreation Representative – provides information on programs and opportunities in the community.
- Religious Community Member – can provide social support to young adults and their families.
- Social worker or Social Services Representative – provides guidance and arranges for case management, support, and respite care.
- Special Olympics Representative – provides sports training, competition, and recreational opportunities for youth.
- Therapist – provides behavioral, physical, occupational and speech services in the community.
- Transportation Representative – offers expertise about transportation options for young adults.
- Very Special Arts Representative – provides information on art programs and opportunities for youth.
- Vocational Educator – provides job training and teaches work-related skills.
- YMCA/YWCA Representative – offers information on recreation and leisure programs.



# Publications

STATE OF WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

*The nation's leading state education department publisher.*

**Now Available!**

## **Opening Doors Series: Transition Resources for Students with Disabilities Planning for Life after High School**

### **Opening Doors to Self-Determination Skills**

Setting and achieving goals helps students grow. Knowing their strengths and addressing their weaknesses is important as students prepare for life after high school. As students move through school and toward adulthood, they go through a process of considering who they are and who they wish to become. What kind of work would they like to do? What will they need to do to pursue this work? What living arrangements do they envision? What education, training, and services will be available to them along the way? Students can work with counselors, parents, and teachers as they work with this resource.

### **Opening Doors to Employment**

Opening Doors to Employment was created to provide input and direction to students as they set and work toward their employment goals. It offers career exploration strategies, job preparation advice, and job search strategies. It addresses questions such as:

- What kind of work would be best for me?
- How do I know I can do certain kinds of jobs?
- How can I get a job and keep a job?
- If I get a certain kind of job, could I live on my income?

### **Opening Doors to Postsecondary Education and Training: Planning for Life after High School**

This Opening Doors booklet leads the reader through a process of planning for life after high school that includes making decisions, planning, and taking actions. Specifically, this publication is a tool for students with disabilities to use as they begin to plan for a successful future. Each student can consider his or her strengths and weaknesses, plan a high school experience that will achieve specific goals, explore possibilities for work and a career, and identify the next steps for life after high school.

### **Opening Doors A Guide to Adult Services**

*Opening Doors a Guide to Adult Services* will help students, their families, and educators understand the adult service system as well as services available in the community. Preparing for graduation and thinking about the future beyond high school is a very exciting time in anyone's life. The possibilities are endless. This guide will help students prepare for this new journey to adulthood.



	In State	Out of State
<b>Opening Doors to Self-Determination Skills</b> (Packet of 50 copies) _____ packets	<input type="checkbox"/> \$35	<input type="checkbox"/> \$50
<b>Opening Doors to Employment</b> (Packet of 50 copies) _____ packets	<input type="checkbox"/> \$45	<input type="checkbox"/> \$66
<b>Opening Doors to Postsecondary Education and Training</b> (Packet of 50 copies) _____ packets	<input type="checkbox"/> \$35	<input type="checkbox"/> \$50
<b>Adult Services</b> (Packet of 50 copies) _____ packets	<input type="checkbox"/> \$55	<input type="checkbox"/> \$81
<b>Value Pack (one packet of each)</b> _____ packets	<input type="checkbox"/> \$160	<input type="checkbox"/> \$240

**Prices subject to change**

**Please visit [dpi.wi.gov/pubsales](http://dpi.wi.gov/pubsales) for current pricing.**

Publication Sales • Drawer 179 • Milwaukee, WI 53293-0179 • (800) 243-8782 • [dpi.wi.gov/pubsales](http://dpi.wi.gov/pubsales)

**Proven and Valuable Resources for:**

- High School Students
- Teachers
- Parents
- Counselors
- IEP Team Members



# Publication Sales

STATE OF WISCONSIN  
DEPARTMENT OF PUBLIC INSTRUCTION  
125 SOUTH WEBSTER STREET  
P.O. BOX 7841  
MADISON, WI 53707-7841

## Opening Doors Series Now Available!

Add shipping charges (see chart below).  
Send prepaid (Visa/MasterCard or check) orders to:

Publication Sales  
Wisconsin Department of Public Instruction  
Drawer 179  
Milwaukee, WI 53293-0179

**Or place Visa/MasterCard orders via a toll-free call  
(800) 243-8782 between 8 a.m. and 4 p.m. CST.**

### United States Shipping and Handling Charges

If order totals,	Shipping and handling is**
Up to \$16.00	\$7.00
\$16.01 to \$30.00	\$8.00
\$30.01 to \$45.00	\$9.00
\$45.01 to \$60.00	\$10.00
\$60.01 to \$100.00	\$12.00
\$100.01 to \$150.00	\$15.00
Over \$150.00	Call (800)243-8782 or email pubsales@dpi.wi.gov for quote.

\* Orders from Alaska and Hawaii will be shipped UPS second-day air. Call 1-800-243-8782 for a quote on shipping costs. For an additional \$10 expediting fee, your credit card order can be shipped the same day! Just let us know when you phone in your order.

\*\* International orders will be mailed via "Airmail Parcel Post" and the customer will be charged according to the actual weight of the order plus handling.

### Don't forget to add shipping & handling to your order!

Please rush my order to:

Your name/agency name \_\_\_\_\_

Street address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime telephone (     ) \_\_\_\_\_

E-mail: \_\_\_\_\_

Place **VISA/MasterCard** orders toll-free at **(800) 243-8782** between 8 a.m. and 4 p.m. CST.

Expiration date:     (month / year)

Card number:

Signature \_\_\_\_\_

**See our complete publications catalog at [dpi.wi.gov/pubsales](http://dpi.wi.gov/pubsales)**

**800-243-8782 • [pubsales@dpi.wi.gov](mailto:pubsales@dpi.wi.gov)**

This publication is available from:  
[www.dpi.wi.gov/sped/pdf/tranopndrs-self-determination.pdf](http://www.dpi.wi.gov/sped/pdf/tranopndrs-self-determination.pdf)

Wisconsin Department of Public Instruction  
125 South Webster Street  
Madison, WI 53707-7841  
800-441-4563 (U.S. only)  
608-266-1146  
608-267-3746 Fax  
<http://www.wsti.org>

Bulletin No. 02041

© October 2011 Wisconsin Department of Public Instruction

ISBN 978-1-57337-151-3

The Wisconsin Department of Public Instruction does not discriminate on the basis of sex, race, color, religion, creed, age, national origin, ancestry, pregnancy, marital status or parental status, sexual orientation, or disability.



Printed on recycled paper



**Wisconsin Department of Public Instruction**  
**Tony Evers, PhD, State Superintendent**