

Transition Planning

with help from the Aging & Disability Resource Center (ADRC)

What is the role of the ADRC in transition planning?

The ADRC offers the public a single-entry point for accurate and unbiased information and assistance on issues affecting adults with disabilities. The ADRC can provide information on adult service agencies, service providers, transportation, respite, caregiving, independent living options and more. The ADRC will determine eligibility for Medicaid Long-Term Care programs and assist with enrollment in a long-term care program if the person is eligible. A Disability Benefit Specialist is available to provide counseling on Social Security benefits including assistance with applying for benefits, dealing with a denial of benefits, and how to work while receiving benefits. Young adults with disabilities can meet with the ADRC as early as 17 years and 6 months.

What is an options counselor?

An options counselor will work with you to address your specific needs during this transition period. They will focus on your strengths, goals and preferences to help you identify and access various resources and service options in the community. They will provide you with the information you need to make the best decisions for yourself. Ultimately, *you remain in control of your life*. The options counselor's role is to be a support person and to help you navigate the next steps as you make your own choices on this journey into adulthood.



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Post-High School Goals & Needs

Finishing high school and becoming an adult is exciting! There are many possibilities, and changes, too. This is the time for you to think about your future. What are your school, work, and personal life goals? Start talking about this with your friends, your family, and your teachers. When you meet with an ADRC options counselor, let them know what goals you have and if you think you might need some help.

Revisit your post-secondary transition plan (PTP).

The PTP is part of your Individualized Education Plan (IEP) and should be reviewed at least annually. Use the Wisconsin Transition App as a tool to start thinking about your plans for after high school then share it at your next IEP meeting.

- ✓ **WiTransition App:** <https://www.witransition.com/>

Employment Support

The Wisconsin Department of Vocational Rehabilitation (DVR) helps people with disabilities find employment. You are eligible if your disability is stopping you from getting or keeping a job that uses your skills and abilities AND you require vocational rehabilitation services to deal with your disability limitations so you can reach your job goal. When you apply for services, DVR will ask for your disability information and may ask you to sign a release so they can request disability records. You can also ask DVR to pay for a disability evaluation if you do not have complete or current disability information.

Contact the Department of Vocational Rehabilitation (DVR) to apply for services at least two years prior to graduating or leaving high school.

- ✓ **Local Office:** 608-789-5627 or 1-800-523-2139
TTY 1-866-392-3090
- ✓ **Website:** <http://www.dwd.wisconsin.gov/dvr>

Decision-Making Support

Everybody needs help making their own decisions, especially young adults. Big decisions, small decisions, all kinds of decisions. It is natural to ask others for help. Start thinking about what kinds of life decisions you might need help making. (Financial, health/medical, long-term care services, education, public benefits, relationships...). Then educate yourself about the range of decision-making supports available.

- ✓ **Release of information**
- ✓ **Supported Decision-Making**
- ✓ **Representative Payee Services**
- ✓ **Power of attorney**
- ✓ **Guardianship**

The range of options you see above offers least to most restrictive options. It is important that individuals stay in control of their lives and different people need different amounts and types of support. Start the conversation early. Think about an individual’s current abilities and areas where growth can occur. Learning is lifelong process and does not end at age 18. People with disabilities can learn new skills and increase their independence over time. Many families feel pressured into pursuing guardianship to retain access to medical or school records, to prevent poor financial judgment, or because they believe that guardianship will make the person safer. *Alternatives to guardianship* may provide the right supports for an individual while keeping them safe and allowing them to grow their independence.

An ADRC options counselor can help you better understand the range of options or tools for decision-making support. They can provide you with more resources to help you determine which option is the most appropriate and least restrictive.

Adult Long-Term Care Programs

What is “long-term care”?

Long-term care is any service or support that a person may need because of a disability, getting older, or having a chronic illness that limits their ability to do things that are part of their daily routine. This includes things like bathing, getting dressed, making meals, going to work, and paying bills.

Review long-term care program options available through WI Medicaid.

Note: these programs have certain eligibility requirements which means that not everyone has the same options. The ADRC options counselor will help you determine your eligibility and provide more in-depth information about the differences between these programs. If eligible, the options counselor will also help you enroll.

✓ **Family Care**

Family Care provides a full range of long-term care services that can help people to remain independent with their daily activities or to receive supports that can help them complete their tasks. Family care provides care management through an “interdisciplinary team”. The team helps you identify the sort of assistance you might need and works with you to arrange your long-term care services.

Read the “Tell Me More About...Family Care” publication to learn more.

✓ **IRIS (Include, Respect, I Self-Direct)**

IRIS allows you to direct your own long-term care services and supports. Self-determination is a core value of the IRIS program. Self-directing your services means that you will select and manage your own providers for the various services, supports, and goods that meet your long-term care needs and goals. Read the “Tell Me More About...IRIS” publication to learn more.

✓ **Option to use Medicaid card services**

In addition to health care services like physician visits, hospital charges, and prescription medications, some long-term care services are automatically covered under full benefit Medicaid using your Forward Health card. These services include personal care, medical transportation, incontinence products, medical supplies and devices, mental health care, and therapeutic or counseling services. Read the “Covered Services in Wisconsin’s Long-Term Care Programs” publication to learn more and to compare what services are covered by Medicaid and what additional services are offered through Family Care and IRIS.

Basics of Social Security Benefits

The Social Security Administration (SSA) administers benefits to eligible people with disabilities through two different programs:

- ✓ **Social Security Disability Insurance (SSDI)**
- ✓ **Supplemental Security Income (SSI)**

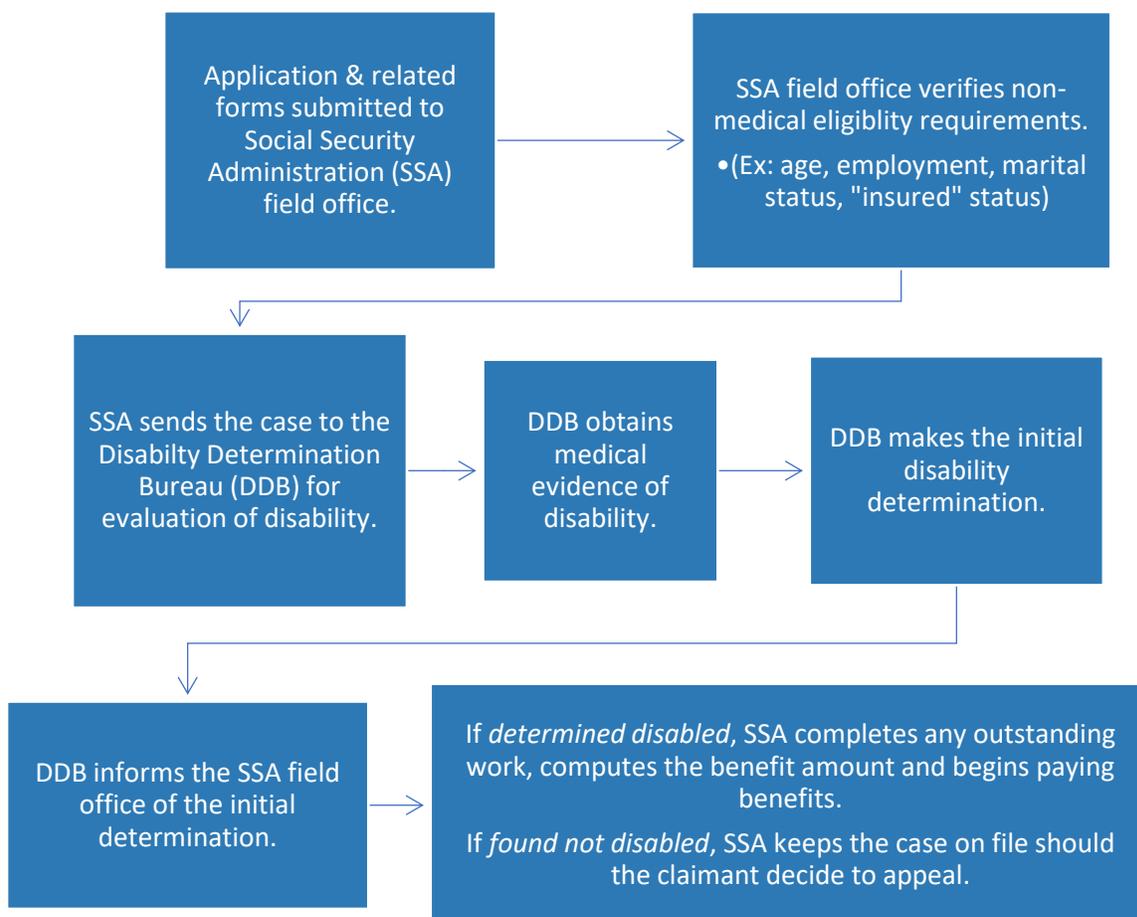
Social Security Disability Insurance: Pays benefits (cash assistance & medical coverage through *Medicare*) to individuals with disabilities and certain family members who are considered “insured”. To be “insured” means you have worked long enough and paid Social Security taxes.

A **disabled adult child** may qualify for SSDI benefits if they are a dependent of a parent who receives disability benefits, retirement benefits or is deceased. This benefit is paid on the parent’s Social Security earning record. The “adult child”—including an adopted child, or, in some cases, a stepchild, grandchild, or step grandchild—must be unmarried, age 18 or older, have a disability that started before age 22, and meet the definition of disability for adults.

Supplemental Security Income: Pays benefits (cash assistance & medical coverage through *Medicaid*) to individuals with disabilities based on financial need.

Disability Determination Process: When you apply for benefits, the Social Security Administration collects medical and other information to determine whether you meet the definition of disability for adults. The “disability determination process” also involves the Wisconsin Disability Determination Bureau (DDB). This group is comprised of disability examiners and medical professionals. They are responsible for obtaining, developing, and reviewing medical evidence of the applicant or “claimant”. The DDB will then make the initial determination on whether a claimant is disabled or blind under the law.

Here is a breakdown of the general process:



The disability determination process can take anywhere from 60 – 120 days before an initial determination is made. A claimant will be notified of the determination via mail.

If a claimant was found *not* to be disabled, they have the right to appeal the initial determination. A Benefit Specialist at the Aging & Disability Resource Center can help with an appeal if needed.

Starting the Application for Social Security Benefits

- **Already receiving SSI (Supplemental Security Income) payments? You will not need to submit a new application.** Social Security will conduct a redetermination of your disability according to adult criteria. The “age-18 redetermination” process typically occurs within the first year after turning 18. Social Security will notify you in writing before they begin your disability redetermination, and they will notify you in writing of the results of the redetermination.

✓ **For more information:** <https://www.ssa.gov/pubs/EN-05-11005.pdf>

- **Not already receiving Social Security benefits?** You will need to submit a new application *on or after your 18th birthday* (will be denied if submitted sooner).

Choose your application method:

- In-person appointment (call to schedule an appointment)
 - La Crosse Office: 1-866-770-2345
- Telephone appointment (call to schedule an appointment):
 - La Crosse Office: 1-866-770-2345
- Online application
 - Go to: <http://ssa.gov/pgm/ssi.htm>.

Note: After completing the medical portion/adult disability report online, you will need to call Social Security to schedule a phone or office interview during which the financial portion of the application will be completed.

- Contact the Disability Benefit Specialist at the Aging & Disability Resource Center: 608-785-5700

☐ **Create a My Social Security account.**

This is a free and secure account that provides personalized tools for EVERYONE, *whether you receive benefits or not*. You can use your account to request a replacement Social Security card, check the status of an application, estimate future benefits, or manage the benefits you already receive.

- ✓ **Online:** <https://www.ssa.gov/myaccount/>

☐ **Open a bank account if you do not already have one.**

Social Security will want somewhere to deposit benefit payments, and this is good practice for learning money management skills and preparing for independent living.

Understanding the application:

There are 2 parts to the application:

- **Medical:** provides non-medical information (age, marital status, employment, or work history) and medical history.
- **Financial:** looks at income (because SSI pays benefits based on financial need).

Parental income and assets will be counted for the entire birth month.

Indicate at the financial interview if the claimant is paying toward household expenses (rent, etc.) as this will increase the SSI monthly payment amount.

The first month of SSI eligibility will be no sooner than the first full month after the applicant's 18th birthday.

The first SSI check may arrive no sooner the second month after eligibility is determined.

Tips for completing the online application:

The online application only deals with medical/functional information. **It can be started early but DON'T CLICK SUBMIT until after turning 18 years old.** You can start the application process online but will need to complete the financial portion by calling Social Security to schedule a phone or office interview. The online application is for both SSDI and SSI. Don't be confused by this. When asked, check "yes" to permanent/total disability.

You can re-enter the online application to update or add information at any time before submission. Keep track of your re-entry number here: _____

Tips for interviewing with Social Security:

Social Security may ask for the following documents, but you do not need to prepare these in advance of applying (in other words, do not wait to apply just because you don't have records):

- ✓ birth certificate
- ✓ guardianship papers
- ✓ medical records
- ✓ educational records (IEP, ISP, 504 plan)
- ✓ employment records (job coach notes, aptitude testing, etc.)
- ✓ IQ testing reports (if available, provide most recent)

Indicate to the Social Security representative whether the applicant is currently receiving Katie Beckett Medicaid, BadgerCare, Adoption Subsidy, Foster Care Medicaid, or if they are currently enrolled in the Children's Long-Term Support (CLTS) program.

Be ready to speak to any recent hospitalizations, emergency department visits and other significant medical care needs that are *current*, not what occurred in early childhood.

Be ready to give the name of a support person such as family member or friend who knows the applicant and who would be willing to fill out a questionnaire regarding their observations of the applicant's functional abilities.

Social Security Employment Supports:

Employment support provisions are available to recipients of Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI). They are meant to assist you in your efforts toward becoming self-sufficient through work by helping you enter the workforce, re-enter, or stay in the workforce while protecting your cash and medical benefits.

Examples of employment supports used by transition-age youth:

Student Earned Income Exclusion: If you are under age 22 and regularly attending school (high school or post-secondary), Social Security will exclude up to a certain dollar amount of earned income per month or per year when calculating your SSI payment amount.

Ticket to Work: This program is for individuals with disabilities who want to work and participate in planning their employment. The Ticket Program increases your available choices when obtaining employment services, vocational rehabilitation services, and other support services you may need to get or keep a job. It is a free and voluntary service. You can use “the Ticket” if you choose and there is no penalty for not using it.

Plan to Achieve Self-Support (PASS): To be eligible for PASS, you must receive SSI (or SSDI and be eligible for SSI) and want to set aside money to pursue an employment goal.