

Healthcare Transition Planning (HTP) and the IEP and IPE

A Resource Document



Plans, Plans, Plans! There are so many types of plans for students and adults with disabilities. It is important that the various plans that relate to education, employment, independent living, and healthcare are all coordinated in some way, even if they cover different areas. That coordination, between plans and between the providers that help implement those plans, will help facilitate greater success.

In this document, we are going to review three important plans: The **Individualized Education Program (IEP)**, the **Individualized Plan for Employment (IPE)**, and the **Healthcare Transition Plan (HTP)**. We will review the key parts of each and talk about how they can and should work together! The document also contains a brief description of the **Individual Health Plan (IHP)** which some students with disabilities may have to ensure their medical conditions are appropriately managed.

	The IEP	The IPE	The HTP
Who Gets this?	Students with disabilities who have been found eligible under the Individuals with Disabilities Education Act (IDEA) for special education and related services.	Students or adults with disabilities who have been found eligible for vocational rehabilitation services under federal and state eligibility criteria who are pursuing employment.	Anyone who needs to move from the pediatric health care system to the adult healthcare system. This is not a required plan but is a helpful one to have.
What is it?	An IEP is a written plan that includes goals and objectives and specialized services and supports that support your individual needs as a student with a disability and that ensures that you receive an appropriate public education (FAPE).	An IPE is a written plan that shows your goal for work and the services you will get to help you reach that goal. If you are a student, your IPE will instead say what your expected employment outcome will be when you leave school.	The HTP is a plan to help you manage the transition to adult healthcare, including finding providers, making sure you have the right insurance, and learning how to manage your healthcare.

Healthcare Transition Planning (HTP) and the IEP and IPE

A Resource Document



	The IEP	The IPE	The HTP
Who develops the plan?	An IEP team that includes your parents, you (the student), school staff, and others work together to develop the IEP. At 18 you get to make your own decisions, but you can still give permission for your parents to participate so that they can help you or they may have a legal document that allows this.	If you apply for VR services, you, your parents (if you are under 18) and your VR counselor develops the IPE. If you are over 18, your parents will not participate unless you give permission for them to do so, or they have a legal document that allows them to do so. A student in transition can have both an IEP and an IPE and the VR counselor may attend IEP meetings.	This is a plan that you will make with your family and your medical providers . You may have to meet separately with different providers. You may also want to talk with your IEP team and/or VR counselor about what to include in this plan based on your specific needs.
What is the plan based on?	The IEP is based on the results of a variety of assessments (tests) that show your strengths, challenges, and how you are currently performing in your classes and in other services you may be getting. At age 16, or earlier if needed, a transition plan will focus on your goals for life after high school and more specialized assessments will take place. Many states require transition planning earlier, at age 14 or even 12.	An IPE is based on existing information if it is current. If you are a student, information from the school will be used as part of the process. Your counselor may also want you to have other assessments look at your strengths, resources, priorities, concerns, abilities, and career interests.	An HTP can be based on a health care skills assessment that looks at a variety of skills needed for you to manage your own healthcare (with support if you need it). It looks at where you are terms of having those skills or developing them. The health care skills assessment can be formal (like reviewing a checklist) or informal, discussion with your family and team(s).

Healthcare Transition Planning (HTP) and the IEP and IPE

A Resource Document



	The IEP	The IPE	The HTP
How long does the plan last?	You will have an IEP for as long as you are eligible for special education services. That decision is made every 3 years. You can receive services up through your 22 nd birthday unless you graduate with a regular or advanced diploma. Your IEP must be reviewed every year, or sooner if you and your parents don't feel you are making progress.	Your IPE lasts as long as it takes for you to meet your employment goal. If your employment goal requires a college education, your IPE will last longer than if you are attending a 6-month job training program. Your IPE must be reviewed every year, or sooner if you don't feel like you are making progress or things aren't going well.	Once you have successfully transitioned from pediatric to adult healthcare providers, you may not need the HTP . But you can keep it as long as it is helpful, particularly for looking at skills that you may need and checking off those you have learned!
What is included in the plan?	An IEP has many parts. These include but are not limited to: <ul style="list-style-type: none"> • Information on your current level of performance in your academic classes and how you function every day (things like speech, social skills, getting around.) • Goals and objectives that will help you progress. 	The IPE also has several sections, including the following <ul style="list-style-type: none"> • Your competitive, integrated employment goal agreed on by you and your counselor. It must be a goal that you want and be based on your career interests and choice. If you are a student, your goal would be your expected employment after high school, which could be after further post-secondary education. 	Unlike the IEP and IPE which have specific required parts, the HTP includes the items you and your team think are needed. These may include the following: <ul style="list-style-type: none"> • Medical summary/history of medical condition(s), allergies, hospitalizations, etc. • Current medications and any information about side effects of current or previous medications.

Healthcare Transition Planning (HTP) and the IEP and IPE

A Resource Document



	The IEP	The IPE	The HTP
<p>What is included in the plan?</p>	<ul style="list-style-type: none"> • Special education and related services (like speech or occupational therapy) that you need to progress in your education. • If you are transition age (16 by federal law but younger in some states), transition goals and services addressing independent living, employment, training, and post- high school education. • Where services will be delivered (in the regular classroom, in a separate classroom, etc.) • How long each service will be (e.g., speech therapy 3 times a week for 30 minutes each.) 	<ul style="list-style-type: none"> • A list of steps needed to reach your goal. • The specific services needed to reach your goal which could include vocational counseling and guidance, assessment, assistive technology, help with benefits planning, transition services, on-the-job training, job coaching, supported employment, and attending college, or other job- related services and supports. • Who will provide these services. You have a right to choose. 	<ul style="list-style-type: none"> • Names and contact information for providers and pharmacy. • Legal considerations (such as health care power of attorney, advanced directive, supported decision-making agreement, guardianship.) • Health care skills and abilities/needs. For example: <ul style="list-style-type: none"> ○ Understanding medical condition ○ Managing medications ○ Managing doctor visits ○ Decision-making

Healthcare Transition Planning (HTP) and the IEP and IPE

A Resource Document



	The IEP	The IPE	The HTP
<p>What else is included in the plan?</p>	<ul style="list-style-type: none"> • Accommodations needed for you to be successful (like sitting up front, longer time to take tests, etc.) • Modifications needed to make information easier to understand, being tested on different information, etc. • How your progress will be measured and how it will be reported to you or your parents. • You and your family's rights including what you can do if you disagree with your program. 	<ul style="list-style-type: none"> • Your responsibilities as a VR client. • The VR agency' responsibilities toward you. • An explanation of whether you will have to pay toward services and how much, and other resources that may be available to pay for certain services. • How often you and your counselor will be in contact. • How services will be coordinated with your IEP or 504 plan if you are a student. 	<ul style="list-style-type: none"> • Other relevant plans (like an IEP or IPE.) • Community services received like case management. • Health care concerns. • Health care goals (long term and short-term). <p>The HTP should be provided to your current and new providers to help in the successful transition from pediatric to adult healthcare. No matter what, you can always still ask for help from your family and support teams.</p>



The Role of the IEP and ITP in Healthcare Transition Planning

One of the most important parts of the Healthcare Transition Plan (**HTP**) are the young adult's healthcare goals. These may include:

- Understanding and describing your medical conditions or disabilities.
- Your ability to consent to treatment or have a process in place for others to help you with this.
- Managing your medication—knowing what to take and when, how to refill, etc.
- Making your own medical appointments.
- Asking questions during medical appointments.
- Tracking health information on your phone or in writing.
- Taking care of equipment (like hearing aids or contact lenses.)

The **HTP** lists current skills, abilities, and goals. But you and your family need to ensure that there is a way to learn these skills. Your family may feel comfortable teaching these skills at home, or you may feel like you can learn them on your own. But you may need the support of professionals to make sure you can become as independent as possible with regard to managing your health care. This is where the **IEP** and **IPE** come in.

HEALTH-RELATED SERVICES IN THE IEP

Students with disabilities who have an IEP must have a transition plan. The federal age requirement to have such a plan is 16. However, many states require planning at an earlier age. The transition plan, which is part of the IEP, sets forth post-secondary goals (what will happen after high school), annual goals to meet those overarching post-secondary goals, and the services and activities needed to achieve those goals. If a student is also a **vocational rehabilitation** (VR) client, the **IPE** sets forth the student's employment goal and the services, steps and activities needed for the student to achieve their employment goal.

The skills needed to transition from pediatric health care to adult health care can be incorporated into the IEP as **independent living goals** or in the IPE as **services to develop skills** needed for successful employment. Some of the goals may be more general, such as self-advocacy skills, which will assist the child in all aspects of life, and some will be more specific to health care management.

Talk to your teams to determine how you can learn the skills needed to be an independent adult and know the supports you may need in managing healthcare needs. Here are examples of health-related goals that could be included in an **IEP**.

SAMPLE IEP GOALS

- By the end of (*insert timeframe*), I will be able to identify my doctors and know how to reach them with X % accuracy.
- By the end of (*insert timeframe*), I will be able to demonstrate with X percent accuracy that I know the medications I take and when I need to take them.
- By the end of (*insert timeframe*), I will be able to make an appointment with my primary care doctor by calling the doctor's office or using the online portal by myself with X % accuracy.
- By the end of the (*insert timeframe*), I will be able to name my medical conditions or disabilities, e.g., autism, epilepsy, etc.
- By the end of (*insert timeframe*), I will be able to prepare 1-3 questions to ask my doctor at an office visit and ask those questions at my visit with no more than one prompt.
- By the end of (*insert timeframe*), I will be able to know when I need to request refills on my medication with X % accuracy and no more than one prompt.

You get the idea! Now let's talk about how **IPEs** can also play a role in helping you achieve your **HTP** goals.

HEALTH-RELATED SERVICES IN THE IPE

The IPE is focused on an individual **obtaining an employment goal**. For example, if you want to become a **computer programmer**, then the services and supports provided through vocational rehabilitation might include payment for further schooling, assistive technology that might be needed, on-the-job training, assistance in obtaining an occupational license or equipment needed. But to be successful on the job (or in college), **you may need to be able to manage certain health care needs** like knowing when to take medication, when there is emergency, when to ask for help, or any other needs you have identified. VR can help.



The **IPE** should include all the services you need to get and keep a job in your chosen field. Those services can include things like **life skills training, independent living skills training, and self-advocacy training**. And the health-related goals on your HTP can be addressed through these types of services. For example:

- If you need assistance in **managing medication** in order to be successfully employed, independent living skills training may help, or the IPE may fund a specific device that helps you track your medication (like a smart phone or iPad).
- If you need **accommodations** on the job to meet health care needs (e.g., extra breaks to test your sugar levels if you have diabetes), self-advocacy training can help you feel more comfortable in asking for accommodations.

If the service is related to gaining or maintaining employment (or advancing in employment) and there is no other agency responsible for funding the services, it can be part of the IPE if agreed to by you and your VR counselor.

INDIVIDUAL HEALTH PLAN (IHP)

So, we've talked about three plans that can be coordinated and work together to help achieve post high-school outcomes. One additional plan a student may have is called an Individual Health Plan (IHP). While the HTP includes medical history, background information, provider contact information, legal information, etc., the **IHP focuses on how to manage the student's medical conditions** while in school.

The IHP is generally developed for students who have **more complex needs or require skilled medical care**. It is a written plan that is developed by the parents, the student depending on age, school nurse, and other relevant individuals, including as appropriate the student's IEP or 504 team. The IHP is a separate document from the IEP or 504 plan.

Students with IHPs generally require medically related services during the school day. This could be providing insulin injections to a student with diabetes. It could be something like caring for a tracheostomy or ensuring epinephrine is available and there is a plan for use for children who may have an allergic reaction. The IHP is used to **communicate health/medical safety needs, detail emergency interventions, and detail the specific actions that school staff are expected to take**. Generally, the school nurse is responsible for managing the IHP. If your school does not have a school nurse on site, ask the school principal who has oversight and responsibility for implementing your child's IHP.

Healthcare Transition Planning (HTP) and the IEP and IPE A Resource Document



A physician or provider does not have to review or authorize the IHP, but all medical interventions must be authorized by a prescriber. **The IHP should include** contact information for the student, parents, and relevant physicians; the student's diagnosis, information about recent hospital admissions, list of medications including dosage, frequency, and side effects; allergies, equipment used/needed; public and private providers, medical history; review of body systems (are there issues with swallowing, hearing, kidneys, etc.); problems to watch out for, and health care goals. The IHP should specify each procedure or intervention that is needed, how to determine if an emergency intervention is needed, who will implement the procedure, and what the expected outcome is. Standards of medical/nursing care practice must be followed.

REFERENCES/RESOURCES

[PACER Center - Health Transition Planning & the IEP](#)
[Parent to Parent of Georgia- Health Transition](#)
[PEATC - Health Care Transition Skills Checklist](#)

[PACER Center – Sample Health Care Plans](#)
[Got Transition – Youth and Family Resources](#)
[PTI Nebraska Family Health Information Center](#)

PEATC's mission focuses on building positive futures for Virginia's children by working collaboratively with families, schools, and communities to improve opportunities for excellence in education and success in school and community life.



The contents of this factsheet were developed under a grant from the US Department of Education, #H235F200001. However, those contents do not necessarily represent the policy of the US Department of Education, and you should not assume endorsement by the Federal Government Project Officer. PEATC is not a legal services agency and cannot provide legal advice or legal representation. Any information contained in this training is not intended as legal advice and should not be used as a substitution for legal advice.



In partnership with RAISE

