

# Healthcare Transition Planning (HTP) and the IEP and IPE

## A Resource Document



As a PTI you probably get a lot of calls from parents confused about all of the different types of plans for students and adults with disabilities. Parents and students need to know how important it is 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 <b>IEP</b> is a written plan that includes goals and objectives and specialized services and supports that support the student with a disability and that ensures that they receive an appropriate public education (FAPE).	An <b>IPE</b> is a written plan that shows lists the individual's goal for work and the services they will get to help them reach that goal. For students, the IPE will instead say what the expected employment outcome will be when the student leaves school.	The <b>HTP</b> is a plan to help students manage the transition to adult healthcare, including finding providers, making sure they have the right insurance, and learning how to manage their healthcare.

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

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

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<p><b>What is included in the plan?</b></p>	<ul style="list-style-type: none"> <li>• <b>Special education and related services</b> (like speech or occupational therapy) that the student needs to progress in their education.</li> <li>• If the student is transition age (16 by federal law but younger in some states), <b>transition goals and services</b> addressing independent living, employment, training, and post- high school education.</li> <li>• <b>Where services</b> will be delivered (in the regular classroom, in a separate classroom, etc.)</li> <li>• <b>How long</b> each service will be (e.g., speech therapy 3 times a week for 30 minutes each.)</li> </ul>	<ul style="list-style-type: none"> <li>• A <b>list of steps</b> needed to reach the goal.</li> <li>• The <b>specific services</b> needed to reach the employment 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.</li> <li>• <b>Who will provide</b> these services. The individual has a right to choose.</li> </ul>	<ul style="list-style-type: none"> <li>• Names and <b>contact information for providers</b> and pharmacy.</li> <li>• <b>Legal considerations</b> (such as health care power of attorney, advanced directive, supported decision-making agreement, guardianship.)</li> <li>• <b>Health care skills and abilities/needs.</b> For example: <ul style="list-style-type: none"> <li>○ Understanding medical condition</li> <li>○ Managing medications</li> <li>○ Managing doctor visits</li> <li>○ Decision-making</li> </ul> </li> </ul>

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<p><b>What else is included in the plan?</b></p>	<ul style="list-style-type: none"> <li>• <b>Accommodations</b> needed for the student to be successful (like sitting up front, longer time to take tests, etc.)</li> <li>• <b>Modifications</b> needed to make information easier to understand, being tested on different information, etc.</li> <li>• How <b>progress will be measured</b> and how it will be reported to the student and parents.</li> <li>• The student and family's <b>rights</b> including what they can do if they disagree with their child's program or services.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>The individual's responsibilities</b> as a VR client.</li> <li>• The <b>VR agency's responsibilities</b> toward the individual.</li> <li>• An explanation of whether the individual will have to <b>pay toward services</b> and how much, and other resources that may be available to pay for certain services.</li> <li>• How <b>often the counselor and individual</b> will be in contact.</li> <li>• If a student, <b>how services will be coordinated</b> with you're the IEP or 504 plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Other relevant plans (like an <b>IEP</b> or <b>IPE</b>.)</li> <li>• <b>Community services</b> received like case management.</li> <li>• <b>Health care concerns.</b></li> <li>• <b>Health care goals</b> (long term and short-term).</li> </ul> <p>The HTP should be provided to current and new providers to help in the successful transition from pediatric to adult healthcare. No matter what, the student can always still ask for help from their 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 their medical conditions or disabilities.
- Their ability to consent to treatment or have a process in place for others to help them with this.
- Managing their medication—knowing what to take and when, how to refill, etc.
- Making their own medical appointments.
- Asking questions during medical appointments.
- Tracking health information on their phone or in writing.
- Taking care of equipment (like hearing aids or contact lenses.)

The **HTP** lists current skills, abilities, and goals. But the student and family need to ensure that there is a way to learn these skills. The family may feel comfortable teaching these skills at home, or the student may feel like they can learn them on your own. But the student may need the support of professionals to make sure they can become as independent as possible with regard to managing their 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 WRITTEN IN FIRST PERSON

- 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 the student achieve their **HTP** goals.

### HEALTH-RELATED SERVICES IN THE IPE

The IPE is focused on an individual **obtaining an employment goal**. For example, if the student wants 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), **the student 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 the individual needs to get and keep a job in their 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 the HTP can be addressed through these types of services. For example:

- If the individual needs 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 them track their medication (like a smart phone or iPad).
- If they need **accommodations** on the job to meet health care needs (e.g., extra breaks to test your sugar levels if they have diabetes), self-advocacy training can help the individual 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 the individual and their 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.



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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](#)

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