

# Benefits Transition Worksheet

AdvocateNest - advocatenest.polsia.app

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## Instructions

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Use this worksheet to track every benefit your child currently receives and what happens to each one when they turn 18. Fill in the current status, then research and document what changes. This is your master tracking document for the entire benefits transition.

## Child / Young Adult Information

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**Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_

**18th Birthday Date:** \_\_\_\_\_

**Primary Diagnosis:** \_\_\_\_\_

**State of Residence:** \_\_\_\_\_

## Supplemental Security Income (SSI)

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**Current Monthly Benefit Amount:** \_\_\_\_\_

**Representative Payee:** \_\_\_\_\_

What changes at 18:

- Case reviewed under ADULT disability criteria
- Benefit amount may change (no longer based on parent income/resources)
- Representative payee status needs to be re-established

Action needed:

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**Redetermination deadline:** \_\_\_\_\_

## Medicaid / Health Insurance

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**Current Medicaid Status:** \_\_\_\_\_

**Medicaid Waiver (if any):** \_\_\_\_\_

**Private Insurance (if any):** \_\_\_\_\_

What changes at 18:

- Medicaid may continue even if SSI is lost (Section 1619(b))
- May qualify for Medicaid under different category (aged/blind/disabled)
- Waiver services may need to be re-applied for
- Can stay on parent's insurance until age 26 (ACA)

Action needed:

\_\_\_\_\_

\_\_\_\_\_

## SNAP / Food Assistance

**Current SNAP Status:** \_\_\_\_\_

What changes at 18:

- Child counted as separate household member
- May qualify for SNAP individually if receiving SSI
- Benefit amount may change based on new household composition

Action needed:

\_\_\_\_\_

\_\_\_\_\_

## Housing Assistance

**Current Housing Assistance (if any):** \_\_\_\_\_

What changes at 18:

- May qualify for Section 8 or other housing programs individually
- Need to update household composition with housing authority

Action needed:

\_\_\_\_\_

\_\_\_\_\_

## Legal Decision-Making

At 18, your child is a legal adult. You no longer have automatic authority to make medical, financial, or legal decisions for them.

- Full guardianship - you make all decisions (most restrictive)
- Limited guardianship - you make some decisions (less restrictive)
- Power of Attorney (healthcare and/or financial)
- Supported decision-making agreement (least restrictive)
- No formal arrangement needed - child can make own decisions

Status/Plan:

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**Attorney handling guardianship (if applicable):** \_\_\_\_\_

**Court date (if applicable):** \_\_\_\_\_

## Vocational Rehabilitation & Employment

- Applied to state Vocational Rehabilitation (VR) services
- Connected with Developmental Disabilities services
- Explored supported employment programs
- Opened an ABLE account

Employment plan:

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## Other Benefits / Services

List any other benefits or services your child receives and note what changes at 18:

**Benefit/Service:** \_\_\_\_\_

What changes:

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**Benefit/Service:** \_\_\_\_\_

What changes:

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**Benefit/Service:** \_\_\_\_\_

What changes:

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## Key Deadlines Summary

**18th Birthday:** \_\_\_\_\_

**SSI Redetermination Deadline:** \_\_\_\_\_

**Medicaid Renewal Date:** \_\_\_\_\_

**Guardianship Filing Deadline:** \_\_\_\_\_

**VR Application Date:** \_\_\_\_\_

**Other Deadline:** \_\_\_\_\_

**Other Deadline:** \_\_\_\_\_

Benefits vary by state. Research your specific state's programs and deadlines.  
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