

Assistive Technology Transition Checklist

Planning for education, employment, independent living, and community participation

Core question: What does the student want or need to do—and could assistive technology make it possible, safer, easier, or more independent?

Use this checklist with the student, family, school team, vocational rehabilitation counselor, service providers, and representatives of future settings. Start early and review the plan as goals, environments, and technology change.

Student and planning information

Student name:

People participating in this review:

Review date and next review date:

Goals and future environments

- ☐ Ask the student what they want to learn, do, change, or control in adult life.
- ☐ Identify likely education or training, employment, home, transportation, and community environments.
- ☐ Include daily activities—not only academic or work tasks.
- ☐ Identify activities that are currently difficult, unsafe, slow, tiring, avoided, or completed by someone else.
- ☐ Consider whether AT could allow the student to perform the activity, participate in part of it, direct assistance, communicate choices, or reduce needed support.

Priority activities or goals:

Review life activities

- ☐ Education and training: reading; writing; note-taking; listening; communication; computer access; testing; labs; trade tools; accessible materials.
- ☐ Employment: job applications; interviews; communication; transportation; task completion; productivity; safety; workplace systems and tools.
- ☐ Organization and memory: calendar; appointments; deadlines; medication routines; transportation; multistep tasks; time management.
- ☐ Communication: expressing needs and choices; understanding information; AAC; telephone and video communication; captions or transcription.
- ☐ Computer and mobile access: keyboard, mouse, touch, voice, switches, eye gaze, screen reading, magnification, braille, captions, mounting and positioning.

- ☐ Personal care and health: dressing; grooming; toileting; eating; medication; health information; emergency communication.
- ☐ Home management: meal preparation; laundry; cleaning; money management; shopping; appliances; environmental controls; home access.
- ☐ Mobility and transportation: wheelchair and seating; transfers; driving; vehicle modifications; public or paratransit; navigation; travel training.
- ☐ Community participation: wayfinding; recreation; relationships; communication; payment; safety; public information; civic participation.
- ☐ Vision and hearing access: lighting, contrast, magnification, braille, screen reading, OCR, tactile identification, captions, amplification, visual or vibration alerts.

Inventory current supports

- ☐ List current AT devices, software, apps, built-in accessibility features, low-tech tools, adaptations, and environmental modifications.
- ☐ List accommodations, strategies, and human supports used with the technology.
- ☐ Record the activity and barrier each solution addresses.
- ☐ Document the features that make the solution effective; do not rely only on a brand or product name.
- ☐ Record what has worked, what has not worked, and why a device or strategy was abandoned.
- ☐ Identify the settings in which the student can and cannot use the solution successfully.
- ☐ Confirm whether the student can set up, charge, clean, store, update, and troubleshoot the technology.
- ☐ Identify training needed by the student, family, educators, employers, or communication partners.

Current AT inventory

Activity or barrier	Technology or strategy	Essential features	Works well? Training needed?

Plan for future settings

- ☐ Contact future education, training, or employment settings early to learn about their systems, procedures, and available accessibility features.

- ☐ If postsecondary education is planned, contact campus disability or accessibility services before classes begin.
- ☐ Test likely solutions with real tasks in environments that resemble the future setting.
- ☐ Check compatibility with required learning platforms, testing systems, computers, job software, tools, communication systems, and security policies.
- ☐ Plan for personal care, meals, medication, transportation, navigation, housing, communication, and emergency needs—not only classroom accommodations.
- ☐ Identify what will happen if the person moves, changes programs, changes jobs, or no longer has internet, cellular service, or caregiver availability.

Ownership, funding, and continuity

- ☐ Identify who owns every important device or software license.
- ☐ Confirm whether school-owned equipment can leave school, be transferred, or be purchased before exit.
- ☐ Identify who may be responsible for obtaining or funding the next solution. Possibilities vary by setting and may include the school, postsecondary institution, employer, vocational rehabilitation, insurance, Medicaid waiver services, AT programs, financing, grants, or personal resources.
- ☐ Identify who will maintain, update, repair, replace, insure, and provide technical support for the technology.
- ☐ Plan for consumable supplies, subscriptions, batteries, accessories, data service, and future replacement costs.
- ☐ Create a backup method for essential communication, mobility, medication, safety, education, or work tasks when technology fails.

Ownership, funding, maintenance, and backup decisions:

Build self-advocacy skills

- ☐ The student can describe what they need or want to do.
- ☐ The student can describe the barrier in functional terms.
- ☐ The student can identify what technology or strategy helps and which features are essential.
- ☐ The student can demonstrate or direct another person in setting up the solution.
- ☐ The student knows when and how to request help, training, repair, or a different solution.
- ☐ The student practices speaking up when the technology or accommodation is unavailable or ineffective.
- ☐ The student knows where important instructions, account information, warranties, documentation, and contact information are stored.
- ☐ The student has an accessible way to communicate preferences and direct support, even if they require significant assistance.

Connect with AT services

- ☐ Identify who can provide a comprehensive AT evaluation when the solution is not obvious.
- ☐ Arrange demonstrations or short-term loans before purchasing when possible.
- ☐ Include fitting, customization, training, implementation, and follow-up—not only device acquisition.
- ☐ Ask whether specialty assessment is needed for communication, hearing, vision, mobility, seating, driving, home access, or computer access.
- ☐ Schedule follow-up after the student enters the new environment.

People or programs to contact and next steps:

Review before exit

- ☐ Update the student's personal AT inventory and transition plan.
- ☐ Provide accessible copies of relevant evaluations, reports, device information, training materials, and successful accommodation descriptions.
- ☐ Confirm that referrals have been made and appointments are scheduled.
- ☐ Confirm that required technology will be available early enough for training before it is needed.
- ☐ Review emergency and backup plans.
- ☐ Set a date to review the plan after transition.

Important: AT does not have to eliminate all human assistance to be successful. It may increase participation, choice, privacy, safety, control, or the ability to direct support.