

## Checklist for Transition and Exit Activities

Revised January 2018

### Planning for Transition

(Conduct activities when a child is near two years of age)

- Share *Parent Transition Handbook* and transition packet
- Inform parent of directory information requirements
- Data Entry:**
  - Case note contacts with parent

### Preparing for a Transition Meeting

- Obtain ROI for the school district, and if applicable, other agency
- Schedule additional ongoing assessments as needed
- Obtain verbal permission to invite ECSE to the IFSP meeting, or obtain parent signature on Opt Out form
- Schedule the IFSP meeting with parent and IFSP team
- Send *Meeting Notification for Transition IFSP* to parent, including:
  - *Parental Rights Statement*
  - Copy of ongoing assessment reports, if conducted
- Notify IFSP team of meeting
- Notify ECSE of meeting, if applicable
- Data Entry:**
  - IFSP Meeting Planner
  - Case note contacts with parent and providers regarding scheduling, verbal permission to invite ECSE, meeting information, etc.

### Directory Information

(Send the following information to the school district by the conclusion of the Transition Plan meeting, unless the parent opts out)

- Child's name;
- Child's birth date;
- Parent's name;
- Parent's address; and
- Parent's phone number (or documentation of no phone number).

### At the Transition Plan Meeting

(Held not fewer than 90 days or no more than nine months before third birthday)

- Follow the IFSP activities for the meeting type (i.e., Initial, Inter-periodic, Six-month, Annual)
- Facilitate transition discussion:
  - Program options after First Steps
  - Procedures to prepare the child for a new setting after First Steps
  - Services needed for the remainder of the child's time in First Steps
  - Confirmation by the conclusion of the Transition Plan meeting that:
    - Directory information was shared with the school district *or* the parent opted out
    - With a signed ROI, additional information was shared with ECSE, including:
      - Copy of the evaluation
      - Copy of most recent assessment
      - Copy of most recent IFSP
- Explain destruction of information
  - *Parental Rights Statement*

### At the Transition Conference with ECSE

(Held not fewer than 90 days or no more than nine months before third birthday)

- Facilitate transition discussion:
  - Differences between First Steps and ECSE
  - Description of the ECSE eligibility process and timelines
  - Contact information for ECSE

### After a Transition Meeting

- ASAP: Identify new provider(s) as indicated in the IFSP, if applicable
- Data Entry:**
  - ASAP: Finalize IFSP team meeting attendance
  - Case note IFSP meeting details
  - Within 14 days of meeting, finalize the entire IFSP
  - Case note date copy of IFSP sent to family, and if applicable, ECSE, PAT or non-enrolled team member
- Send IFSP to family, including:
  - Copies of all signed forms
  - Copy of *Monthly Fee Determination*, if applicable

### Summer Third Birthday

(Only applicable for a child with a third birthday of April 1 through August 15)

#### **At Transition Plan and/or Conference with ECSE Meeting:**

- Share *Parent Options for Summer Third Birthday Services*

#### **Prior to Child's Third Birthday:**

- Verify the child is eligible for ECSE or eligibility determination is in process
- Notice of Action/Consent to Continue First Steps for Summer Third Birthday Children*
- Schedule IFSP meeting up to 30 days prior to third birthday, as applicable
- Follow the IFSP activities for either an Initial or Annual meeting type
  - Document school readiness discussion

### Exiting First Steps

(Within 30 days prior to exit)

- Contact the parent to answer any lingering questions about transition out of First Steps
- Update case notes
- Complete data entry, as applicable, including:
  - IFSP meetings
  - Authorizations
  - Compliance notes
- Review progress notes
- Enter Exit ECO rating
- File all remaining paperwork in child's paper record

### After Child Exits First Steps

(Within 30 days after exit)

- Inactivate record after child exits
  - Select appropriate end enrollment reason