

Checklist for Transition and Exit Activities

Revised June 2016

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

- Schedule additional ongoing assessments as needed
- Obtain verbal permission to invite ECSE to the IFSP meeting, or obtain parent signature on Opt Out form
- Obtain ROI for ECSE, if applicable
- 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 ECSE no later than 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 Transition Plan meeting that:
 - Directory information was shared with ECSE *or* the parent opted out
 - With a signed ROI, additional information was shared with ECSE, including:
 - Copy of the evaluation
 - Copy of most recent ongoing assessment report
 - 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
- Notice of Action Consent - Initiation of Summer Third Birthday Service(s)*

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