

Transition

How To



1. Enter the Transition Discussion Information on the IFSP
2. Start a Transition Record
3. View the 4410 Calculator Dates from within EI-Hub
4. View and Edit Part B Eligibility
5. View and Edit a Transition Conference Notification
6. Enter Transition Plan Members
7. View and Enter Transition Details and Post-Transition Services
6. View and Enter Consents, Notifications, and Revocations
7. Locate Different Part B & Non-Part B Forms
8. Edit Part B Program – Form A Part 1b
9. Edit Transition Plan Part B Program Family Outcomes Form A
10. Edit Transition Plan Non-Part B Program Form B Part 1b
11. Edit Non-Part B Program Family Outcomes Worksheet Form B

Transition

Transition Plan

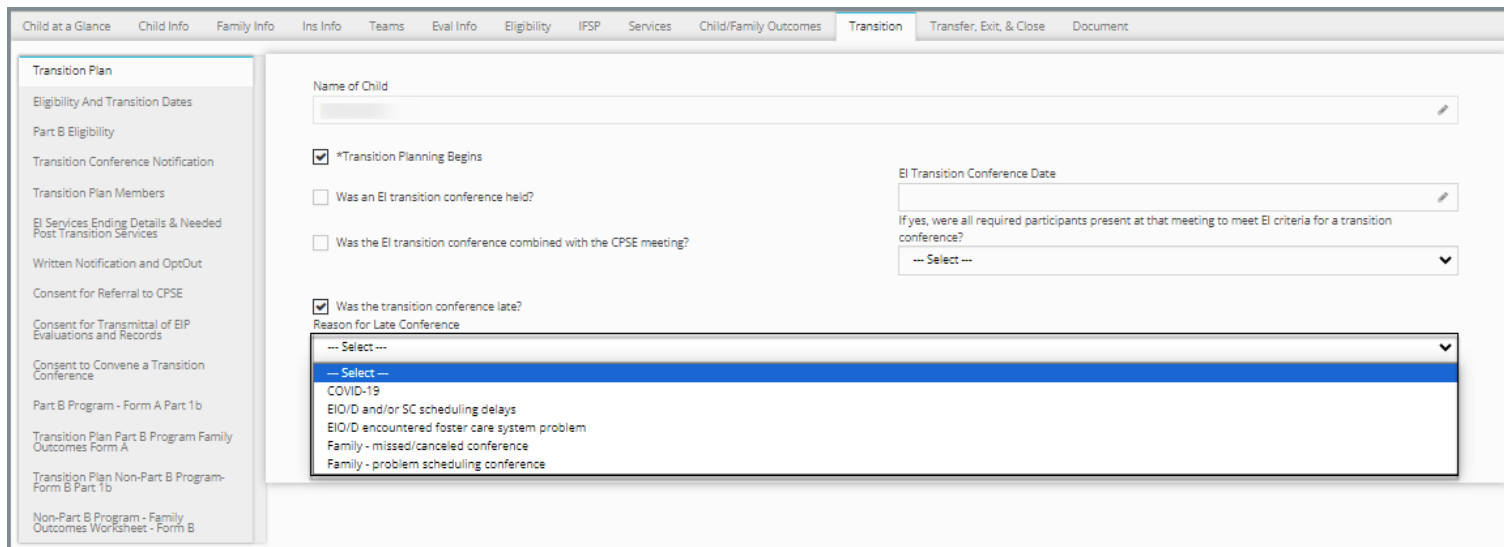
How To

Start a Transition Record.



Note

- If the transition conference is late, the reason for the late conference must be entered.
- If a child is referred to the EIP after the 90-day timeline for making notification to CPSE and convening a transition conference but prior to 45 days before their 3rd Birthday, the EIO can still accept the referral. Still, with parental consent, the child should also be immediately referred to CPSE.
- The EI Transition Conference Date field is when the conference occurred. Future dates cannot be entered. This is not a required field.
- Refer to Slide 10 to view and enter data into the Transition Conference Notification Panel.
- A check in the checkbox is an affirmative response. Blank checkboxes indicate that the activity has not been completed or the statement is untrue.



The screenshot shows the 'Transition Plan' section of the EI-Hub interface. The left sidebar lists various sections: Transition Plan, Eligibility And Transition Dates, Part B Eligibility, Transition Conference Notification, Transition Plan Members, EI Services Ending Details & Needed Post Transition Services, Written Notification and OptOut, Consent for Referral to CPSE, Consent for Transmittal of EIP Evaluations and Records, Consent to Convene a Transition Conference, Part B Program - Form A Part 1b, Transition Plan Part B Program Family Outcomes Form A, Transition Plan Non-Part B Program-Form B Part 1b, and Non-Part B Program - Family Outcomes Worksheet - Form B.

The main content area is titled 'Transition Plan' and contains the following fields and checkboxes:

- Name of Child:** A text input field.
- ☒ ***Transition Planning Begins**
- ☐ **Was an EI transition conference held?**
- ☐ **Was the EI transition conference combined with the CPSE meeting?**
- ☒ **Was the transition conference late?**
- Reason for Late Conference:** A dropdown menu with the following options: COVID-19, EIO/D and/or SC scheduling delays, EIO/D encountered foster care system problem, Family - missed/canceled conference, and Family - problem scheduling conference.
- EI Transition Conference Date:** A date input field.
- If yes, were all required participants present at that meeting to meet EI criteria for a transition conference?:** A dropdown menu with the option: --- Select ---.

Transition

Transition Discussion

How To

Enter Transition Discussion Details on an IFSP.

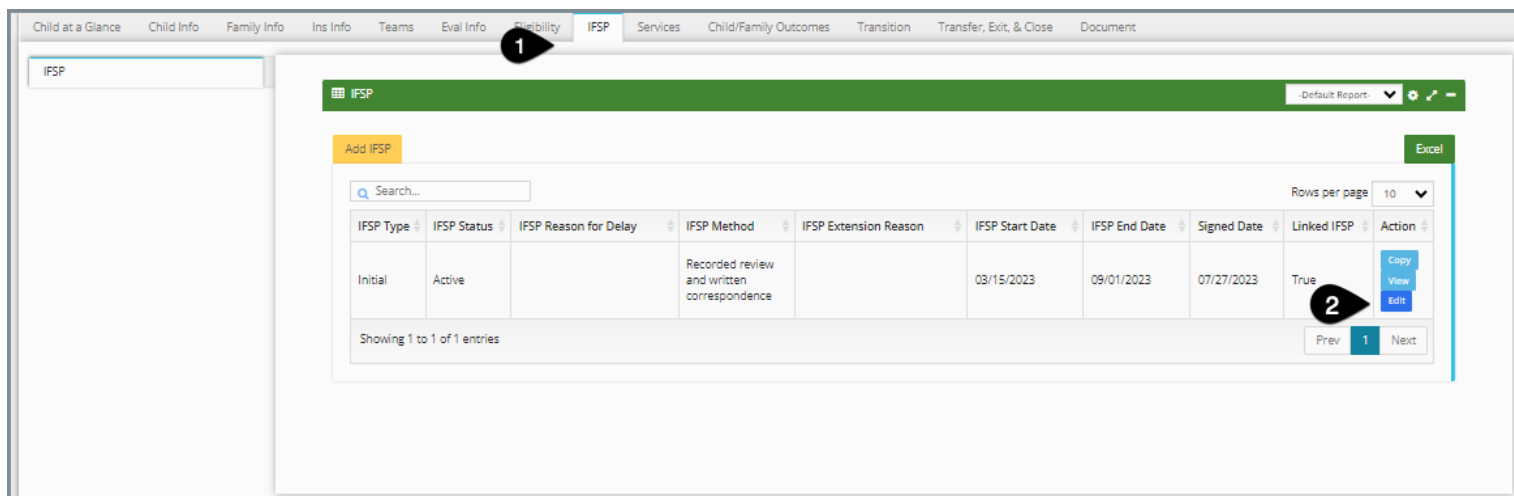
Notes

- Please note two main areas of EI-Hub address Transition. One area is the **IFSP Transition** panel, accessed through the **IFSP** tab (as seen on this slide). The second area is the **Transition** tab (discussed later in this job aid) after selecting the child.
 - The **IFSP Transition** panel houses general transition discussions that occur at **every** IFSP meeting. *The child's transition should be discussed at **every** IFSP meeting.
 - The **Transition** tab is where the formal transition process starts with the development of the transition plan and recording of the transition meetings and conferences held.
- **Please note** that **4410** is mentioned throughout this document. **4410** refers to Special Education services and programs for preschool children with disabilities.
- The **EIP to 4410 Calculator** will assist interested parties in identifying several key dates as defined in law and regulation relating to the action steps within the transition planning process from EIP to preschool special education programs and/or services.

Step / Action

1. Select the **IFSP** tab from within the Child's record.
2. Select **Edit** from the **IFSP** grid to edit an existing IFSP.

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IFSP Type	IFSP Status	IFSP Reason for Delay	IFSP Method	IFSP Extension Reason	IFSP Start Date	IFSP End Date	Signed Date	Linked IFSP	Action
Initial	Active		Recorded review and written correspondence		03/15/2023	09/01/2023	07/27/2023	True	Copy View Edit

Transition

Transition Discussion

How To

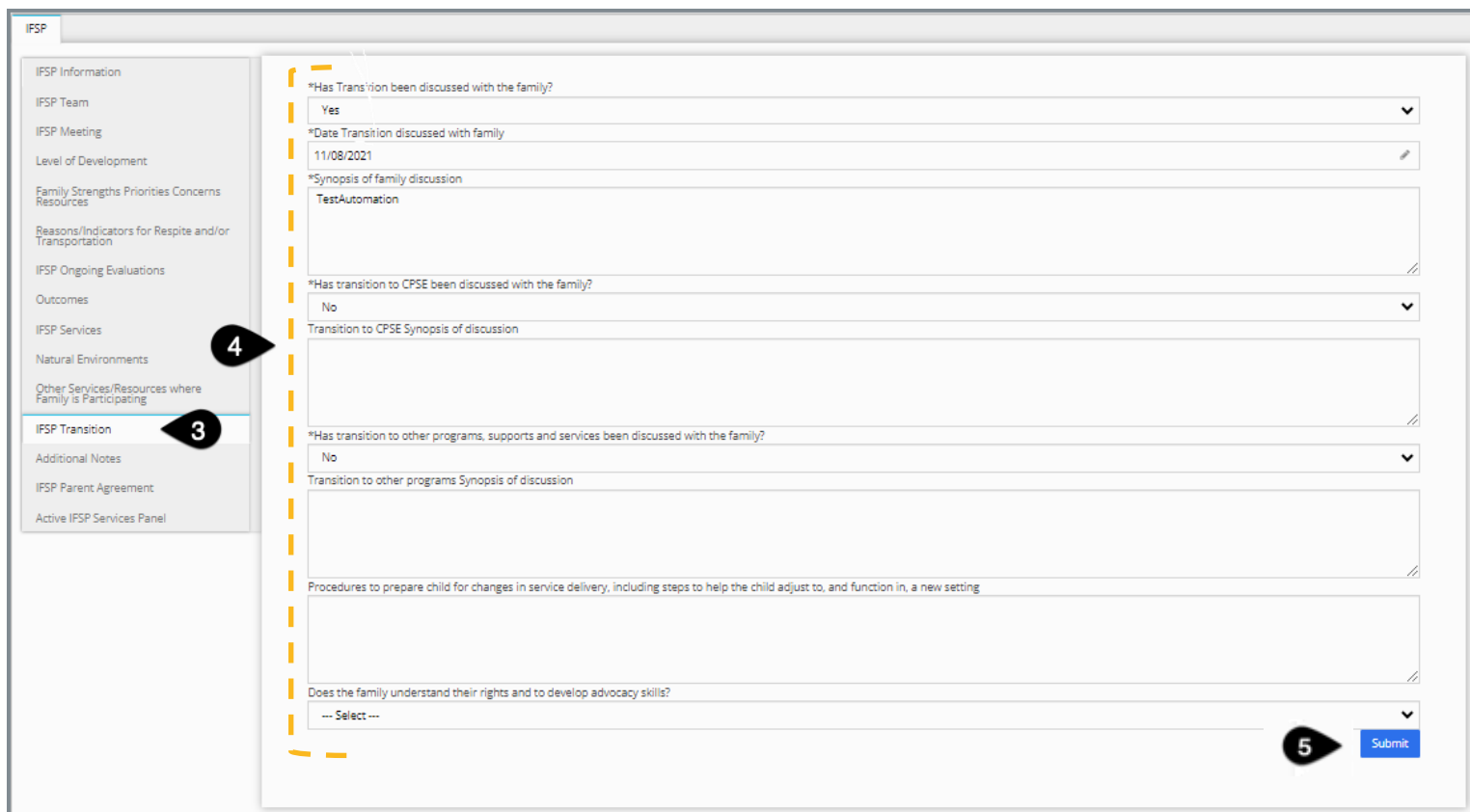
Enter Transition Discussion Details on an IFSP.

Note

- An asterisk (*) indicates a required field.
- Remember that a child's transition should be discussed at **every** IFSP meeting. Therefore, in every instance that an IFSP meeting occurs, the 'Date transition discussed with family' field should reflect the IFSP meeting date.
- The 'Has Transition been discussed with the family?' date should not be modified if a subsequent transition discussion occurs within the IFSP period. **This date should only reflect the date of the IFSP meeting.**

Step / Action

3. While in the IFSP, select the **IFSP Transition** panel. Upon selecting the **IFSP Transition** panel, the **IFSP Transition** pane populates.
4. Fill in all required fields beginning with the '**Has Transition been discussed with the family?**' field.
5. Select the **Submit** button.



The screenshot shows the 'IFSP Transition' panel selected in the left sidebar. The main form area contains several required fields marked with an asterisk (*):

- *Has Transition been discussed with the family? (Dropdown menu with 'Yes' selected)
- *Date Transition discussed with family (Text field with '11/08/2021' entered)
- *Synopsis of family discussion (Text area with 'TestAutomation' entered)
- *Has transition to CPSE been discussed with the family? (Dropdown menu with 'No' selected)
- Transition to CPSE Synopsis of discussion (Text area)
- *Has transition to other programs, supports and services been discussed with the family? (Dropdown menu with 'No' selected)
- Transition to other programs Synopsis of discussion (Text area)
- Procedures to prepare child for changes in service delivery, including steps to help the child adjust to, and function in, a new setting (Text area)
- Does the family understand their rights and to develop advocacy skills? (Dropdown menu with '--- Select ---' selected)

Numbered callouts indicate the following steps:

- 3: Selecting the 'IFSP Transition' panel in the sidebar.
- 4: Filling in the required fields starting with '*Has Transition been discussed with the family?'.
- 5: Clicking the 'Submit' button at the bottom right.

Transition

Transition Plan

How To

Start a Transition Record.

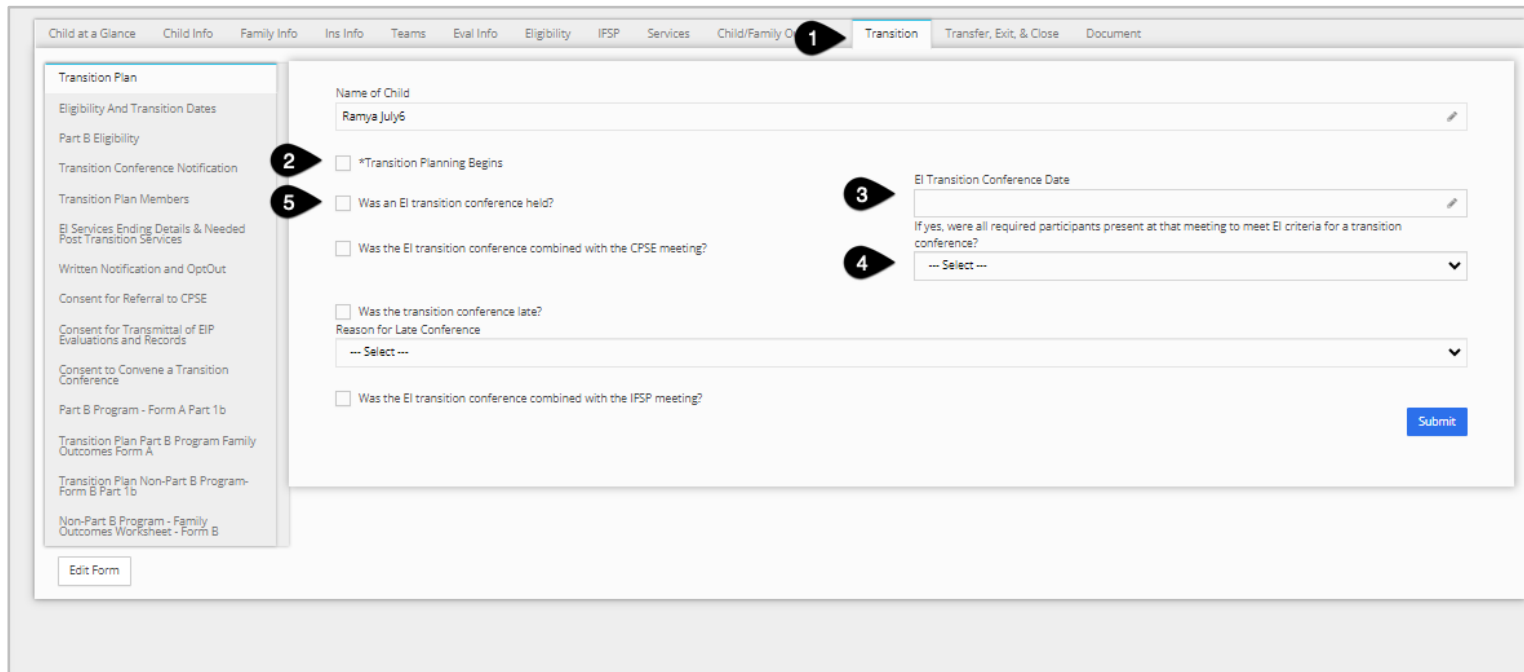
Note

- To begin a transition record and save/submit all Transition panels, the Transition Plan panel and the transition checkbox (Step 2) are required. **Once checked and saved, the checkbox cannot be unchecked.**
- Any information entered must be saved by selecting the **Submit** button before one can move to another panel.
- After starting a record, the panels in the Transition tab do not need to be completed in a specific order.
- The Transition Conference due date can be found by referencing the **Eligibility and Transition Dates** panel below the **Transition Plan** panel.
- If the transition conference is late, the reason for the late conference must be entered.

Step / Action

- Select the **Transition** tab from within the Child's record. The **Transition Plan** panel auto-populates with the child's name.
- Click the **Transition Planning Begins** checkbox (***NO transition information can be entered UNLESS the 'Transition Planning Begins' checkbox is checked**).
- Enter the **EI Transition Conference Date**, if one was held. This should be the actual date the conference was held.
- Select **Yes/No** if all required meeting participants meet the EI criteria.
- if an EI transition conference was held, select '**Was an EI transition conference held?**' checkbox.

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The screenshot shows the 'Transition' tab in the EI-Hub interface. The left sidebar lists various panels, with 'Transition Plan' selected. The main content area contains the following fields and checkboxes:

- Name of Child:** A text field containing 'Ramya July6'.
- *Transition Planning Begins:** A checkbox, labeled with a '2' in a black circle.
- Was an EI transition conference held?:** A checkbox, labeled with a '5' in a black circle.
- EI Transition Conference Date:** A text field, labeled with a '3' in a black circle.
- If yes, were all required participants present at that meeting to meet EI criteria for a transition conference?:** A dropdown menu with '--- Select ---', labeled with a '4' in a black circle.
- Was the transition conference late?:** A checkbox.
- Reason for Late Conference:** A dropdown menu with '--- Select ---'.
- Was the EI transition conference combined with the CPSE meeting?:** A checkbox.
- Was the EI transition conference combined with the IFSP meeting?:** A checkbox.
- Submit:** A blue button at the bottom right.

The top navigation bar includes tabs for 'Child at a Glance', 'Child Info', 'Family Info', 'Ins Info', 'Teams', 'Eval Info', 'Eligibility', 'IFSP', 'Services', 'Child/Family C', 'Transition', 'Transfer, Exit, & Close', and 'Document'. The 'Transition' tab is currently active.

Transition

Transition Plan

How To

Start a Transition Record.

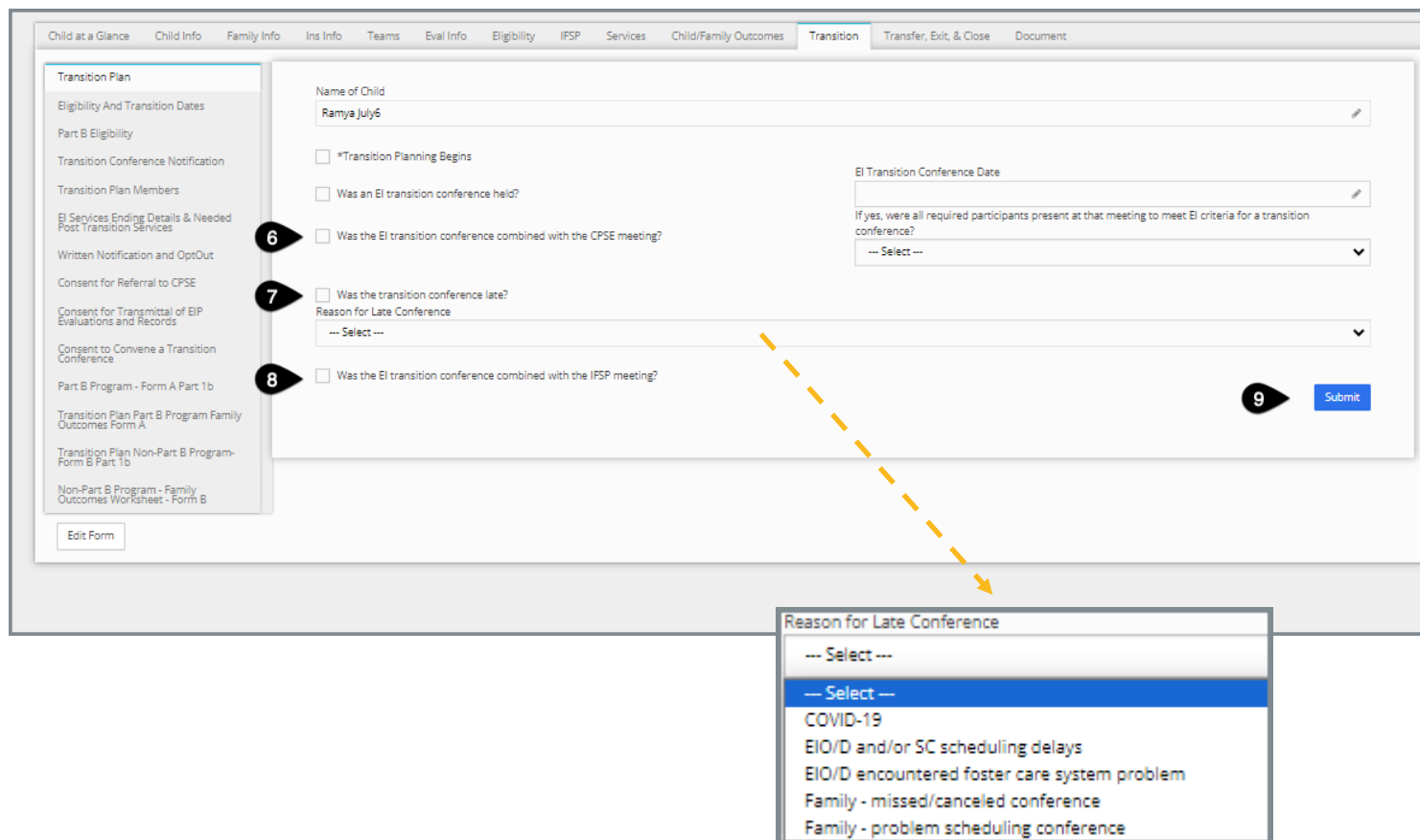


Note

- To start a transition plan record and make all transition panels available, the transition checkbox (Step 3) is required. **Once checked and saved, the checkbox cannot be unchecked.**
- Any information entered must be saved by selecting the **Submit** button before one can move to another panel.
- After starting a record, the panels in the Transition tab do not need to be completed in a specific order.
- The Transition Conference due date can be found by referencing the **Eligibility and Transition Dates** panel below the **Transition Plan** panel.
- If the checkbox for "Was the transition conference late?" is blank, the "Reason for Late Conference" is not an editable field.

Step / Action

- If applicable, select '**Was the EI transition conference combined with the CPSE Meeting?**' checkbox.
- If the transition conference was late, select '**Was the transition conference late?**' checkbox and select a reason for the late conference from the **Reason for the Late Conference** drop-down.
- If applicable, select '**Was the EI transition conference combined with the IFSP meeting?**' checkbox.
- Select the **Submit** button.



The screenshot shows the 'Transition Plan' form in the EI-Hub system. The form is divided into several sections, with the 'Transition Plan' section being the primary focus. It includes fields for 'Name of Child' (Ramya July6), 'EI Transition Conference Date', and checkboxes for 'Was the EI transition conference held?', 'Was the EI transition conference combined with the CPSE meeting?', 'Was the transition conference late?', and 'Was the EI transition conference combined with the IFSP meeting?'. A dropdown menu for 'Reason for Late Conference' is shown, with options including COVID-19, EIO/D and/or SC scheduling delays, EIO/D encountered foster care system problem, Family - missed/canceled conference, and Family - problem scheduling conference. A 'Submit' button is located at the bottom right of the form. A dashed orange arrow points from the 'Reason for Late Conference' dropdown in the screenshot to the list of reasons provided in the adjacent block.

Transition

Eligibility And Transition Dates

How To

View Important Eligibility and Transition dates.

Note

- Auto-populated dates are a feature of Case Management. This feature removes the work of manually tracking and calculating dates.
- Eligibility and Transition dates align with the **"EIP to 4410 Calculator."**

Step / Action

- Select the **Eligibility and Transition Dates** panel.
- Dates are view-only and automatically calculated.

EI Child ID:

Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Close Document

Transition Plan

Eligibility And Transition Dates 1

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

2

Child's Date of Birth
06/01/2022

Date Child is first potentially eligible for 4410 Services
01/02/2025

Notice to CPSE at least 90 days before the child is potentially eligible for 4410 Services
10/04/2024

Transition Conference Convened at least 90 days before the child is first eligible for 4410 Services
10/04/2024

Transition Conference Convened no earlier than
09/01/2024

Last date for referral to CPSE to ensure eligibility determination before age three (approximately 90 days before child turns three)
03/03/2025

Last Date for a child found eligible for 4410 Services to receive EIP services
08/31/2025

Edit Form

Transition

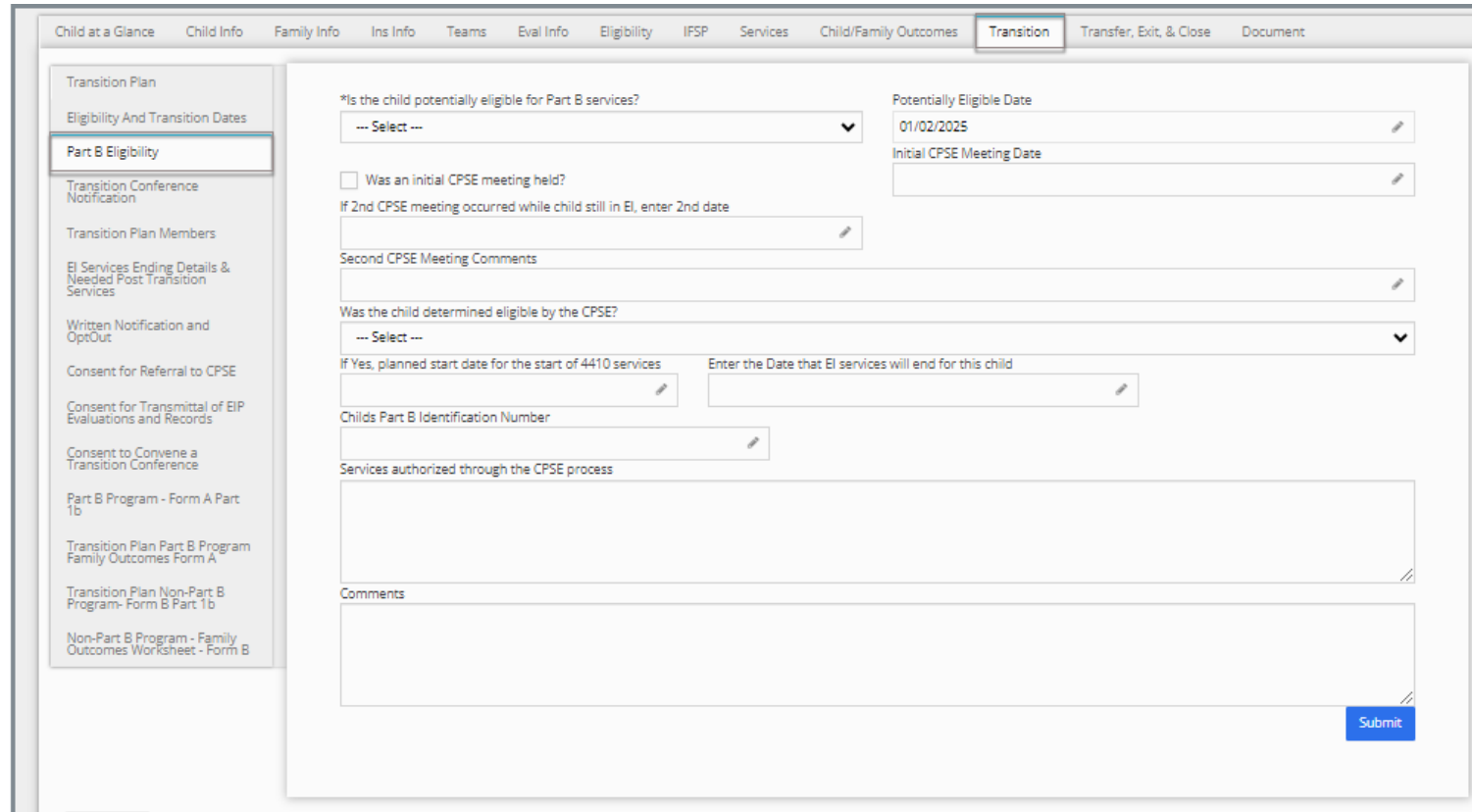
Part B Eligibility

How To

View and Edit Part B Eligibility.

Note

- Auto-populated dates are a feature of Case Management. This feature removes the work of manually tracking and calculating dates.
- Eligibility and Transition dates align with [‘The EIP to 4410 Calculator.’](#)
- **Please note that** the ‘Childs Part B Identification Number’ field is generated (ID number) by the CPSE system and may be found on the Child's IEP; the Service Coordinator may complete this field if the number is known. This field is not required.
- There is no validation that crosschecks dates on this panel against each other. **With manually entered dates, it is important to verify that the dates entered are accurate and were entered in the appropriate data field.**



The screenshot shows the 'Transition' tab in the EI-Hub system. The left sidebar contains a menu with the following items: Transition Plan, Eligibility And Transition Dates, Part B Eligibility (highlighted), Transition Conference Notification, Transition Plan Members, EI Services Ending Details & Needed Post Transition Services, Written Notification and OptOut, Consent for Referral to CPSE, Consent for Transmittal of EIP Evaluations and Records, Consent to Convene a Transition Conference, Part B Program - Form A Part 1b, Transition Plan Part B Program Family Outcomes Form A, Transition Plan Non-Part B Program- Form B Part 1b, and Non-Part B Program - Family Outcomes Worksheet - Form B.

The main content area displays the 'Part B Eligibility' form. It includes the following fields and sections:

- *Is the child potentially eligible for Part B services?**: A dropdown menu with '--- Select ---'.
- Potentially Eligible Date**: A date field showing '01/02/2025'.
- Initial CPSE Meeting Date**: A date field.
- ☐ Was an initial CPSE meeting held?
- If 2nd CPSE meeting occurred while child still in EI, enter 2nd date**: A date field.
- Second CPSE Meeting Comments**: A text area.
- Was the child determined eligible by the CPSE?**: A dropdown menu with '--- Select ---'.
- If Yes, planned start date for the start of 4410 services**: A date field.
- Enter the Date that EI services will end for this child**: A date field.
- Childs Part B Identification Number**: A text field.
- Services authorized through the CPSE process**: A large text area.
- Comments**: A large text area.
- Submit**: A blue button at the bottom right.

Transition

Part B Eligibility



Step / Action

1. Select the **Part B Eligibility** panel.
2. Select **Yes/No** from the drop-down '**Is the child potentially eligible for Part B Services.**'
3. The **Potential Eligibility Date** field auto-populates with the date the child is first potentially eligible for 4410 services (as per the EIP to 4410 calculator).
4. If held, select the checkbox for '**Was an Initial CPSE Meeting was held?**'
5. If held, enter the **Initial CPSE Meeting Date**. If applicable, enter the second date in the '**If 2nd CPSE meeting occurred while child still in EI, enter 2nd date**' and enter any **Second CPSE Meeting Comments** in the text field.
6. Select **Yes/No** for **Was the Child determined eligible by the CPSE** field.
7. If yes, enter the date for the '**Planned start date for the start of 4410 services,**' if applicable.
8. Enter the '**Date that EI services will end for this child,**' if applicable.
9. The CPSE system generates the '**Childs Part B Identification Number**' field, which may be found on the Child's IEP. The Service Coordinator may complete this field if the number is known. This field is not required.
10. Enter notes into the '**Services authorized through the CPSE process**' textbox, if applicable.
11. Enter comments into the **Comments** textbox, if applicable.
12. Click **Submit**.

The screenshot shows the 'Transition' tab in the EI-Hub system. The left sidebar lists various panels, with 'Part B Eligibility' selected. The main form area contains the following fields and actions:

- 1**: 'Transition Plan' dropdown menu.
- 2**: 'Eligibility And Transition Dates' section.
- 3**: 'Is the child potentially eligible for Part B services?' dropdown menu.
- 4**: 'Was an Initial CPSE meeting held?' checkbox.
- 5**: 'Initial CPSE Meeting Date' date picker.
- 6**: 'If 2nd CPSE meeting occurred while child still in EI, enter 2nd date' date picker.
- 7**: 'Second CPSE Meeting Comments' text area.
- 8**: 'Was the child determined eligible by the CPSE?' dropdown menu.
- 9**: 'If Yes, planned start date for the start of 4410 services' date picker.
- 10**: 'Enter the Date that EI services will end for this child' date picker.
- 11**: 'Childs Part B Identification Number' text field.
- 12**: 'Services authorized through the CPSE process' text area.
- 13**: 'Comments' text area.
- 14**: 'Submit' button.

Transition

Transition Conference Notification

How To

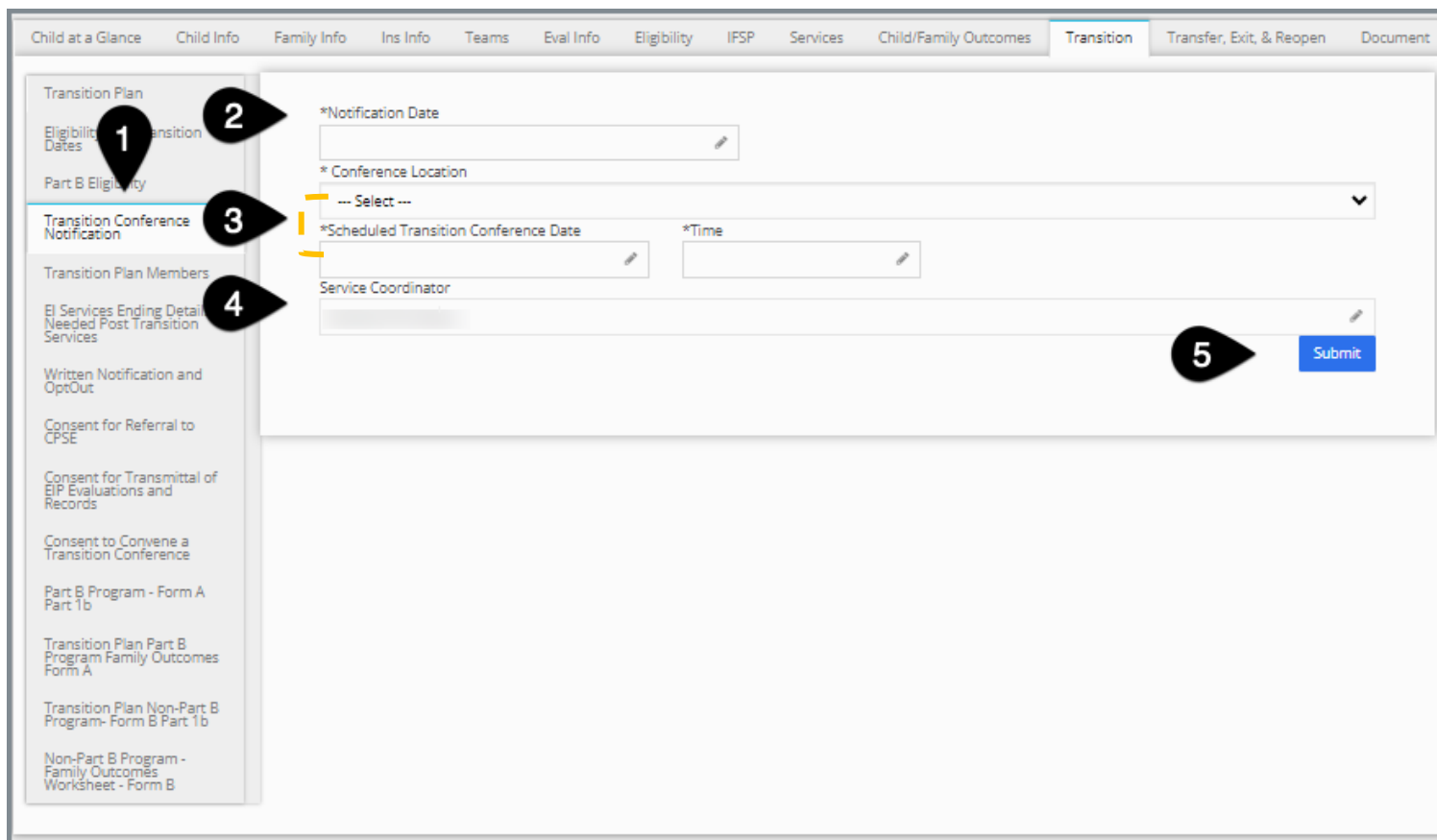
View and Edit a Transition Conference Notification.

Note

- The 'Service Coordinator' field on this panel auto-populates.
- Select the link for more EIP Transition Guidance https://www.health.ny.gov/community/infants_children/early_intervention/transition/.
- Scheduled Transition Conference Date** could be a future expected date.
- The '**Conference Location**' field reflects the school district where the child resides, **not** the actual location of the conference.
- The '**Notification Date**' field is when the notification was sent to the CPSE Chair.

Step / Action

1. Select the **Transition Conference Notification** panel.
2. Enter the '**Notification Date**.' This date can be entered manually or selected using the calendar feature.
3. Using the drop-down, select the **Conference Location** followed by select dates for the '**Scheduled Transition Conference Date**' and '**Time**.' The date can be entered manually or selected using the calendar feature.
4. The '**Service Coordinator**' field is pre-populated with the child's service coordinator name.
5. Click **Submit**.



The screenshot shows the 'Transition' tab in a software interface. The left sidebar contains a list of panels, with 'Transition Conference Notification' selected and highlighted by a black callout bubble with the number 1. The main content area displays the form for this panel. A black callout bubble with the number 2 points to the '*Notification Date' field. A black callout bubble with the number 3 points to the '*Conference Location' dropdown menu. A black callout bubble with the number 4 points to the '*Scheduled Transition Conference Date' and '*Time' fields. A black callout bubble with the number 5 points to the 'Submit' button at the bottom right of the form. The form also includes a 'Service Coordinator' field that is pre-populated with text.

Transition

Transition Plan Members

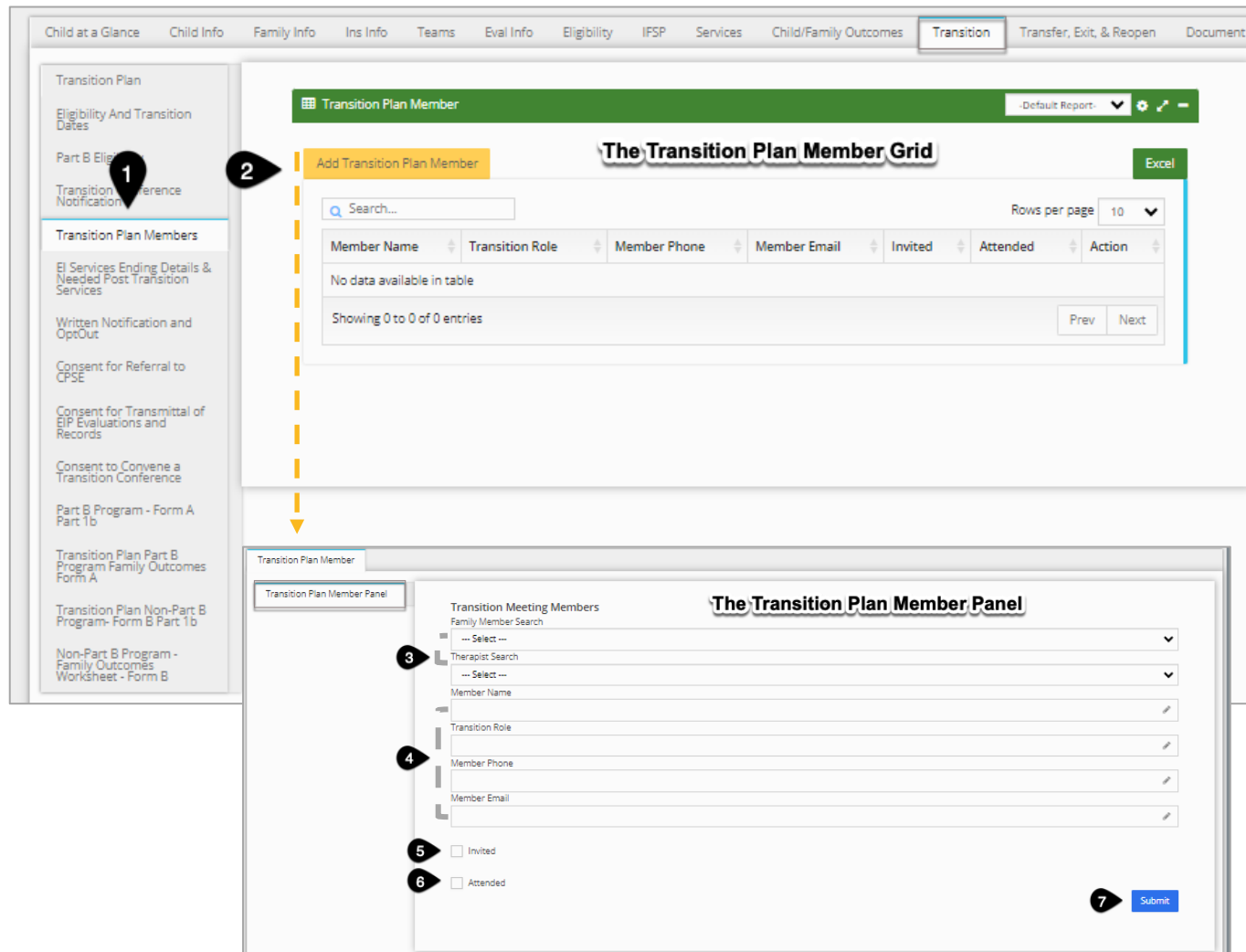
How To

View and Enter Transition Plan Members.



Note

- Only one Transition Plan member may be added at a time.
- If a family member is not available for selection in the '**Family Member Search**' field, please check the status of that family member within the **Family Info** tab. If not present, you can add the family member in the **Family Info** tab or enter the family member information into the Member Name and Transition Role fields directly on the **Transition Plan Member Panel**.
- While you can identify transition meeting members as being both 'Invited' and 'Attended' within the **Transition Plan Member** panel, you are not required to select both options simultaneously.
- You may select another option (i.e., attended) at another time or later.
- If a Therapist is not available for selection, please check the status of that provider within the **Services** tab.
- The **Therapist Search** field is populated based on individuals previously assigned to the child's case through service authorization or Teams assignment.



The screenshot displays the EI-Hub software interface for managing Transition Plan Members. The interface is divided into two main sections: 'The Transition Plan Member Grid' and 'The Transition Plan Member Panel'.

The Transition Plan Member Grid: This section is located at the top right of the interface. It features a search bar, a table with columns for Member Name, Transition Role, Member Phone, Member Email, Invited, Attended, and Action. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A 'Prev' and 'Next' button are visible at the bottom right of the table.

The Transition Plan Member Panel: This section is located below the grid. It contains several fields for entering member information:

- Transition Meeting Members:** A dropdown menu.
- Family Member Search:** A dropdown menu.
- Therapist Search:** A dropdown menu.
- Member Name:** A text input field.
- Transition Role:** A text input field.
- Member Phone:** A text input field.
- Member Email:** A text input field.
- Invited:** A checkbox.
- Attended:** A checkbox.
- Submit:** A blue button at the bottom right.

Numbered callouts (1-7) are present in the image to guide the user through the process:

1. Points to the 'Transition Plan Members' link in the left sidebar.
2. Points to the 'Add Transition Plan Member' button.
3. Points to the 'Transition Meeting Members' dropdown.
4. Points to the 'Family Member Search' dropdown.
5. Points to the 'Invited' checkbox.
6. Points to the 'Attended' checkbox.
7. Points to the 'Submit' button.

Transition

Transition Plan Members

How To

View and Enter Transition Plan Members.

Option 1: When using Family Member Search

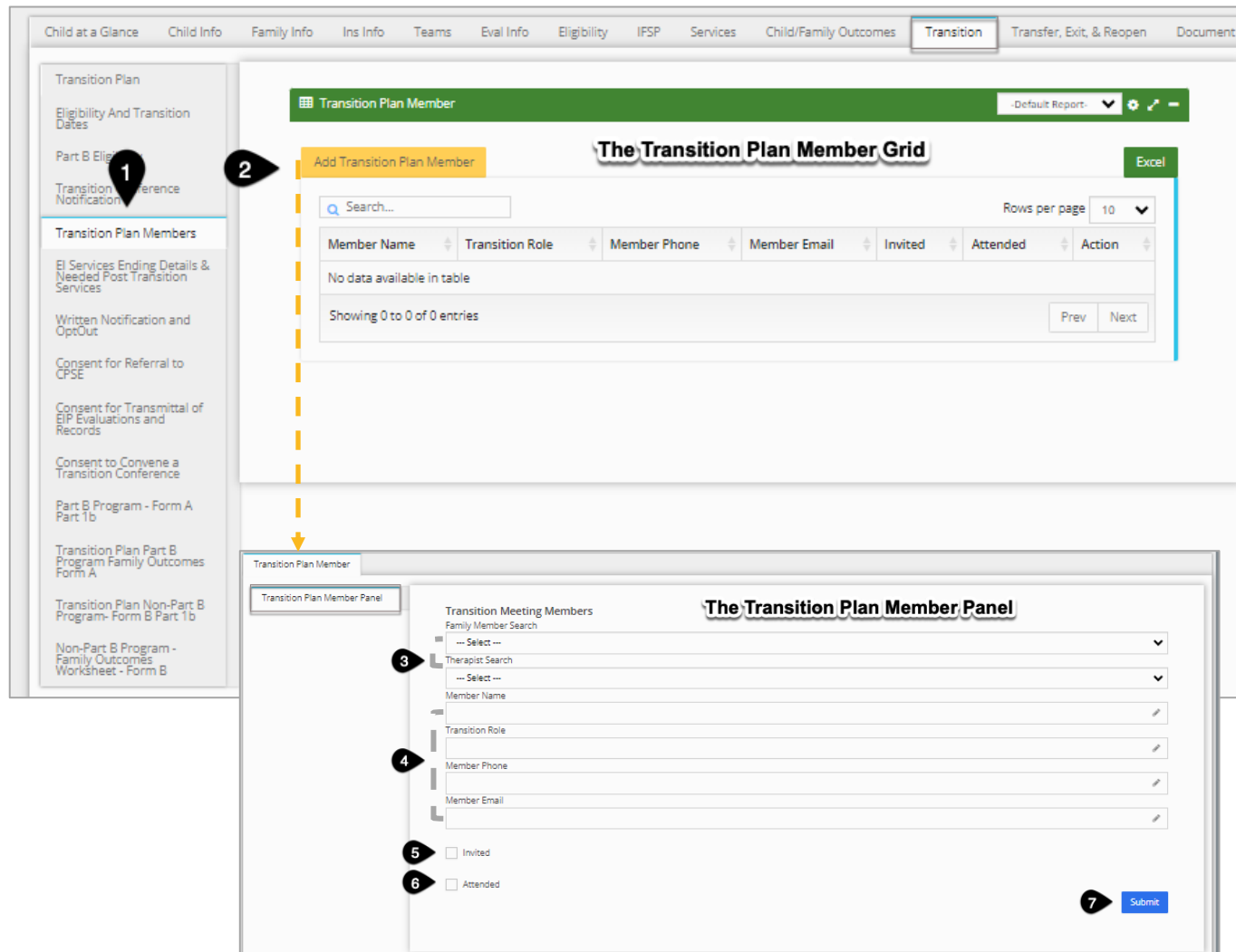
Step / Action

1. From the **Transition** tab, select the **Transition Plan Members** panel. The **Transition Plan Member** grid populates.
2. Select the **Add Transition Plan Member** button. **The Transition Plan Member** panel populates.
3. Select a Member from the **Family Member Search** or **Therapist Search** drop-down.
4. The selected Member information auto-populates (if entered in previous tabs such as the Family and Teams tabs) in the **Member**, **Transition Role**, **Member Phone**, and **Member Email** fields.
5. Select the checkbox **Invited** if the member has been invited to the conference. This is an optional field.
6. Select the checkbox **Attended** if the member has attended the conference. This is an optional field.
7. Select the **Submit** upon completion.

Option 2: Adding a Member Name and Role in the Panel

Step / Action

1. From the **Transition** tab, select the **Transition Plan Members** panel. The **Transition Plan Member** grid populates.
2. Select the **Add Transition Plan Member** button. **The Transition Plan Member** panel populates.
4. Complete the **Member Name**, **Transition Role**, **Member Phone**, and **Member Email** fields.
5. Select the checkbox **Invited** if the member has been invited to the conference. This is an optional field.
6. Select the checkbox **Attended** if the member has attended the conference. This is an optional field.
7. Select the **Submit** upon completion.



The screenshot displays the EI-Hub software interface. The top navigation bar includes tabs: Child at a Glance, Child Info, Family Info, Ins Info, Teams, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, **Transition**, Transfer, Exit, & Reopen, and Document. The left sidebar lists various panels, with 'Transition Plan Members' highlighted. The main area shows 'The Transition Plan Member Grid' with a search bar, a table with columns (Member Name, Transition Role, Member Phone, Member Email, Invited, Attended, Action), and a message 'No data available in table'. Below the grid is 'The Transition Plan Member Panel' with fields for Member Name, Transition Role, Member Phone, Member Email, and checkboxes for Invited and Attended. A 'Submit' button is at the bottom right. Numbered callouts 1 through 7 indicate the steps for adding a member.

Transition

EI Services Ending Details & Post Transition Services

How To

View and Enter EI Ending Details and Post-Transition Services.

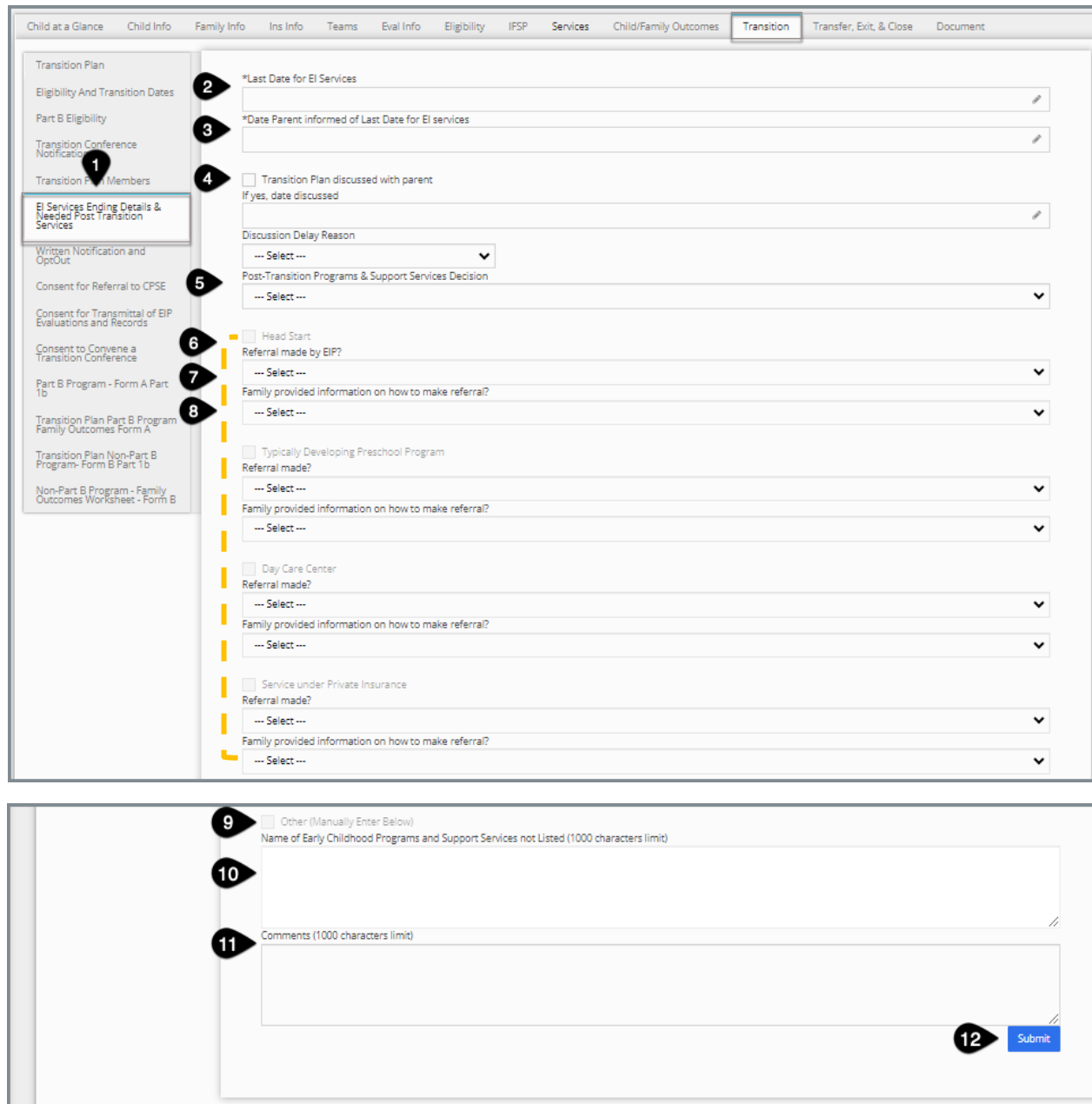
Note

Based on **Post Transition Programs & Support Services Decision** field, there are two options: "Early Childhood program and support services needed after transition" and "No formal referral/ discharge discussed." If "Early Childhood Program and support services needed after transition" is chosen, the subsequent fields below (Head Start, Typically Developing Preschool Program, etc.) will become active and can be checked.

Step / Action

1. Select the **EI Services Ending Details & Needed Post Transition Services** panel.
2. Enter the **Last Date for EI Services**.
3. Select the **'Date Parent Informed of Last date for EI Services.'** This date can be entered manually or selected using the calendar feature.
4. If the **Transition Plan** was discussed with the parent, select the **Transition Plan Discussed** checkbox and enter the **Date Discussed**.
5. Select the applicable **Post-Transition Programs & Support Services Decision** (i.e., Head Start, Preschool Program, Day Care Center).

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The screenshot displays the 'Transition' tab in the EI-Hub system. The left sidebar contains a list of panels, with 'EI Services Ending Details & Needed Post Transition Services' selected. The main content area is divided into two columns. The left column contains a list of panels with numbered callouts (1-8) indicating the steps: 1. Transition Plan Members, 2. Eligibility And Transition Dates, 3. Part B Eligibility, 4. Transition Plan Members, 5. Written Notification and OptOut, 6. Consent for Referral to CPSE, 7. Consent for Transmittal of EIP Evaluations and Records, 8. Consent to Convene a Transition Conference. The right column contains the main form fields with numbered callouts (9-12): 9. *Last Date for EI Services, 10. *Date Parent informed of Last Date for EI services, 11. Transition Plan discussed with parent, 12. Discussion Delay Reason, 13. Post-Transition Programs & Support Services Decision, 14. Head Start, 15. Referral made by EIP?, 16. Family provided information on how to make referral?, 17. Typically Developing Preschool Program, 18. Referral made?, 19. Family provided information on how to make referral?, 20. Day Care Center, 21. Referral made?, 22. Family provided information on how to make referral?, 23. Service under Private Insurance, 24. Referral made?, 25. Family provided information on how to make referral?, 26. Other (Manually Enter Below), 27. Name of Early Childhood Programs and Support Services not Listed (1000 characters limit), 28. Comments (1000 characters limit), 29. Submit button.

Transition

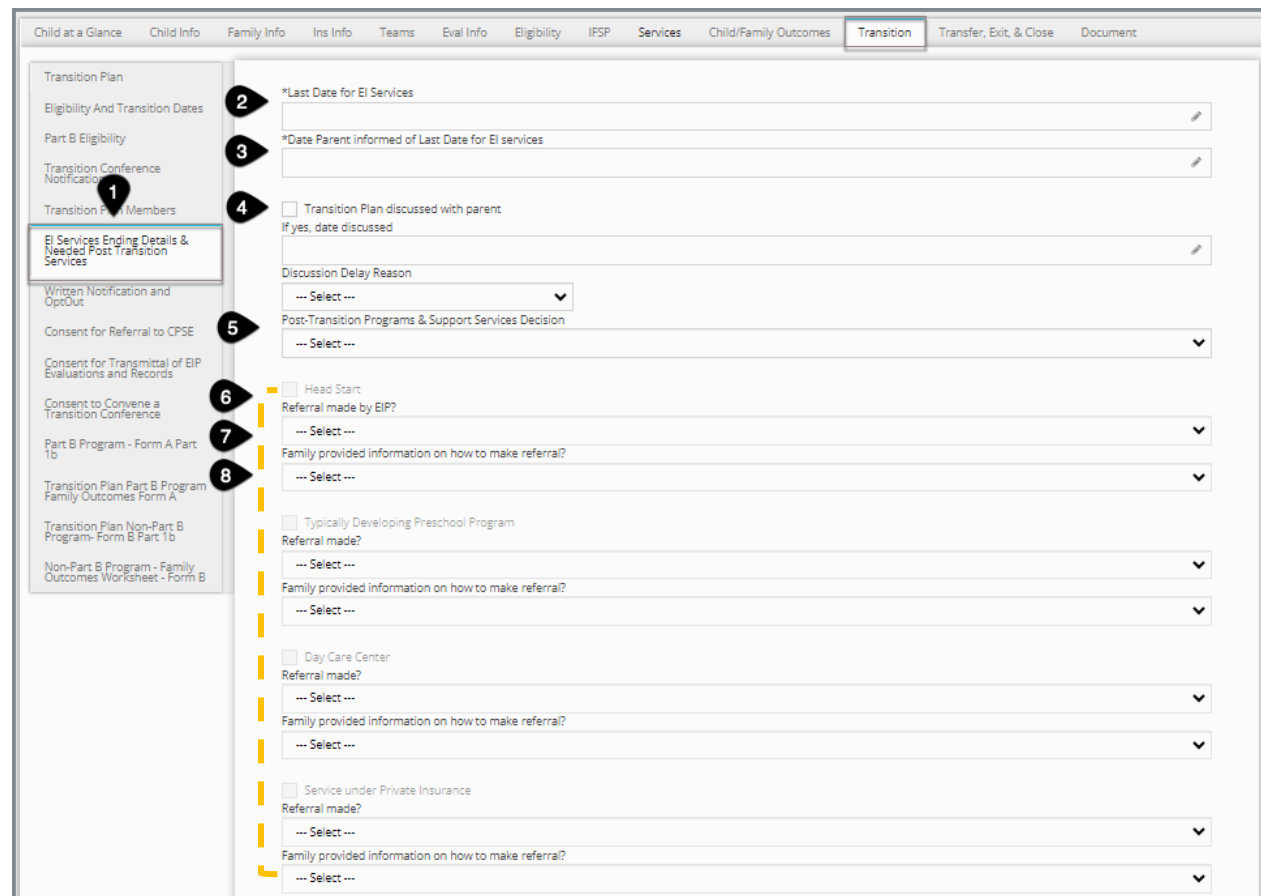
EI Services Ending Details & Post Transition Services

How To

View and Enter EI Ending Details and Post-Transition Services.

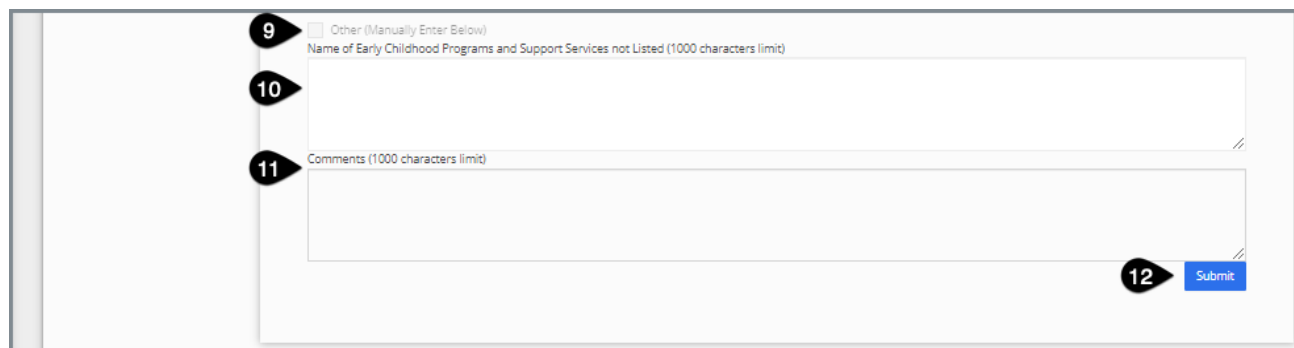
Step / Action

6. If a referral is made for **Early Childhood Program and Support Services**, select the applicable '**Program**' checkbox (Head Start, Preschool Program, Day Care Center, Service under Private Insurance, Office of People with Developmental Disabilities, Office of Mental Health, Children with Special Care Needs, Physically Handicapped Children's Program, EI At-Risk/Child Find Tracking, NYS Commission for the Blind and Visually Impaired, and Referral back to EIP if child is under 3).
7. For each program checked (checkbox selected), use the dropdown to choose Yes or No if '**EIP made by Referral.**'
8. For each program checked, use the dropdown to choose Yes or No if the '**Family was Provided Information on how to make a Referral.**'
9. Select the '**Other**' checkbox if the child is transitioning to a program not listed.
10. Using the textbox, enter the **Name of Early Childhood Programs/Support Services not Listed** to which the child will be transitioning.
11. Enter any **Comments**, if applicable.
12. Click **Submit**.



The screenshot shows the 'Transition' tab in the EI-Hub system. The left sidebar contains a navigation menu with items like 'Transition Plan', 'Eligibility And Transition Dates', 'Part B Eligibility', 'Transition Conference Notifications', 'Transition Plan Members', 'EI Services Ending Details & Needed Post Transition Services' (highlighted), 'Written Notification and OptOut', 'Consent for Referral to CPSE', 'Consent for Transmittal of EIP Evaluations and Records', 'Consent to Convene a Transition Conference', 'Part B Program - Form A Part 1b', 'Transition Plan Part B Program Family Outcomes Form A', 'Transition Plan Non-Part B Program- Form B Part 1b', and 'Non-Part B Program - Family Outcomes Worksheet - Form B'. The main content area shows fields for:

- *Last Date for EI Services (step 2)
- *Date Parent Informed of Last Date for EI services (step 3)
- Transition Plan discussed with parent (checkbox) (step 4)
- Discussion Delay Reason (dropdown) (step 5)
- Post-Transition Programs & Support Services Decision (dropdown) (step 5)
- Head Start Referral made by EIP? (dropdown) (step 6)
- Family provided information on how to make referral? (dropdown) (step 7)
- Typically Developing Preschool Program Referral made? (dropdown) (step 8)
- Family provided information on how to make referral? (dropdown) (step 8)
- Day Care Center Referral made? (dropdown) (step 8)
- Family provided information on how to make referral? (dropdown) (step 8)
- Service under Private Insurance Referral made? (dropdown) (step 8)
- Family provided information on how to make referral? (dropdown) (step 8)



The screenshot shows the bottom section of the form. It includes:

- Other (Manually Enter Below) checkbox (step 9)
- Name of Early Childhood Programs and Support Services not Listed (1000 characters limit) (step 10)
- Comments (1000 characters limit) (step 11)
- Submit button (step 12)

Transition

Written Notification and Opt-Out

How To

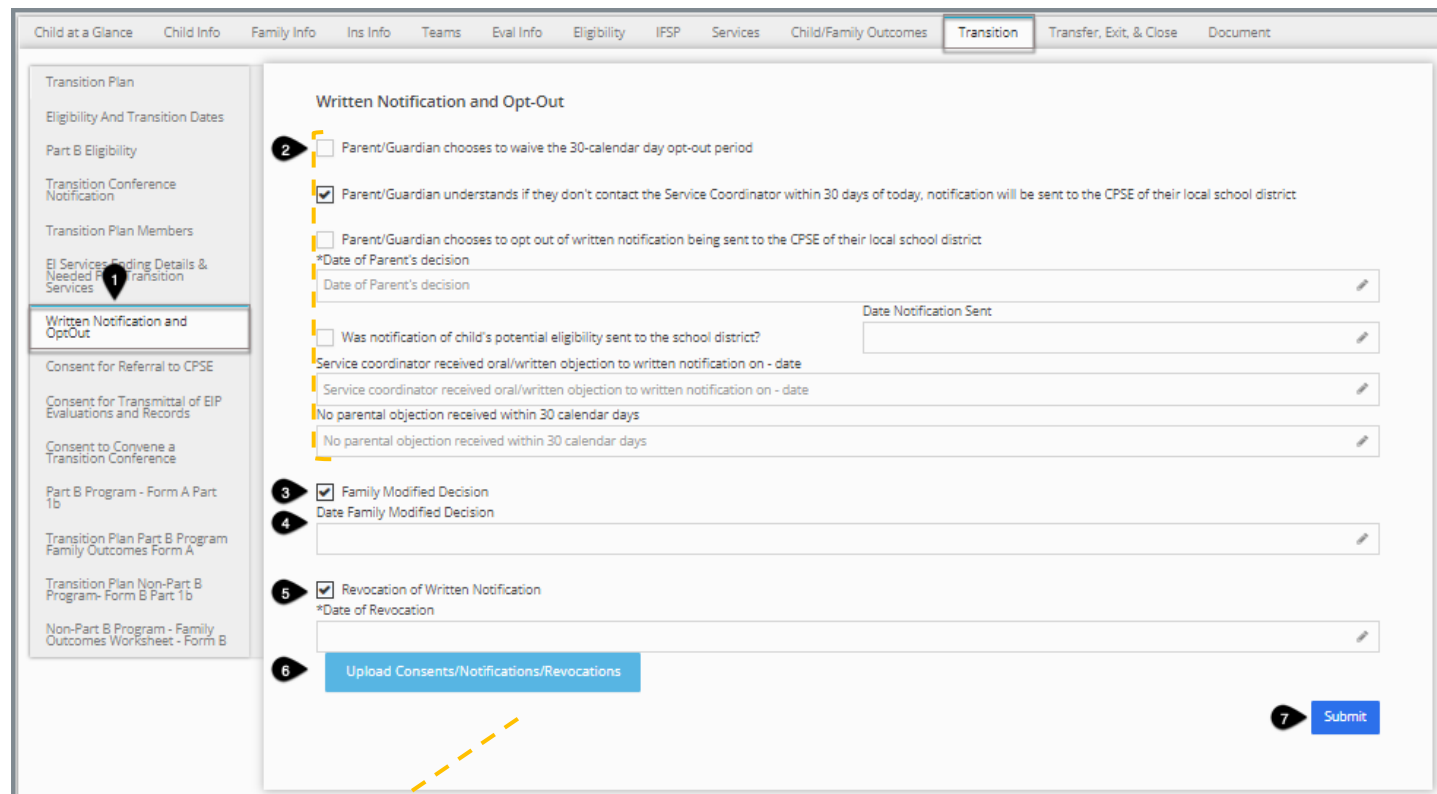
Complete a Written Notification and Opt-Out.

Note

Selecting some checkboxes on this page may result in additional checkboxes, fields, and drop-downs.

Step / Action

1. Select the **Written Notification and Opt-Out** panel.
2. Select the **'Parent/Guardian Written Notification and Opt-Out'** checkboxes that apply. If applicable, select any additional checkboxes, fields, and drop-downs that may populate due to your selections.
3. Select the **'Family Modified Decision'** checkbox, if applicable.
4. The **'Date Family Modified Decision'** field is when the EIO/D or Service Coordinator was notified that the family had modified their original decision regarding whether the school district should be notified of the child's potentially eligible for the 3-5 (Part B) program.
5. Select the **'Revocation of Written Notification'** checkbox, if applicable. Enter the **'Date of Parent's Decision'** and **'Date of Revocation'** (to revoke written notification). Both dates can be entered manually or selected using the calendar feature.
6. Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** popup panel appears, allowing you to select and upload relevant document types.
7. Select the **Submit** button.



Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Close Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Pending Details & Needed For Transition Services

Written Notification and Opt-Out

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

Written Notification and Opt-Out

2 ☐ Parent/Guardian chooses to waive the 30-calendar day opt-out period

☒ Parent/Guardian understands if they don't contact the Service Coordinator within 30 days of today, notification will be sent to the CPSE of their local school district

☐ Parent/Guardian chooses to opt out of written notification being sent to the CPSE of their local school district

*Date of Parent's decision

Date of Parent's decision

Date Notification Sent

☐ Was notification of child's potential eligibility sent to the school district?

Service coordinator received oral/written objection to written notification on - date

Service coordinator received oral/written objection to written notification on - date

No parental objection received within 30 calendar days

No parental objection received within 30 calendar days

3 ☒ Family Modified Decision

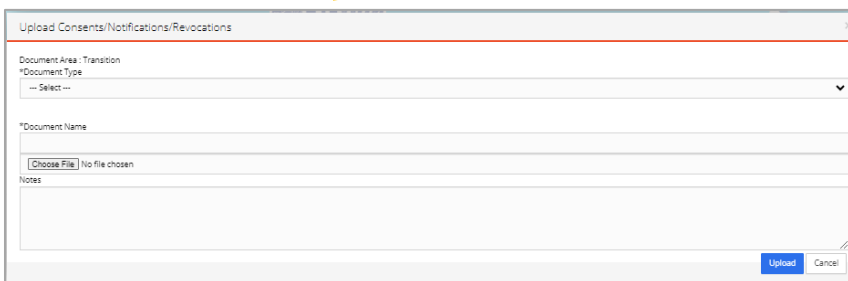
4 Date Family Modified Decision

5 ☒ Revocation of Written Notification

*Date of Revocation

6 Upload Consents/Notifications/Revocations

7 Submit



Upload Consents/Notifications/Revocations

Document Area: Transition

*Document Type

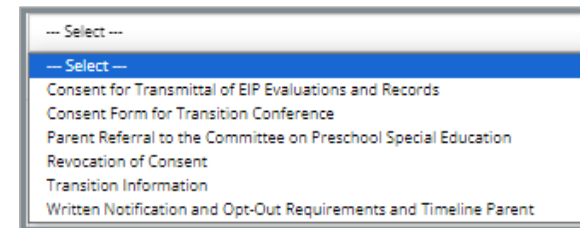
--- Select ---

*Document Name

Choose File No file chosen

Notes

Upload Cancel



--- Select ---

--- Select ---

Consent for Transmittal of EIP Evaluations and Records

Consent Form for Transition Conference

Parent Referral to the Committee on Preschool Special Education

Revocation of Consent

Transition Information

Written Notification and Opt-Out Requirements and Timeline Parent

Transition

Consent for Referral to CPSE

How To

Complete a Consent for Referral to CPSE.

Note

- Parents or guardians will choose to give or not give consent to a referral being sent to the CPSE.
- Selecting some checkboxes on this page will allow additional checkboxes, fields, and drop-downs to appear.
- The default landing page is shown in the screenshot.

EI Child ID: Accept, Agency - DOB:

Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Reopen Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

Consent for Referral to CPSE

☐ Parent/Guardian gives consent to a referral being sent to the CPSE

☒ Parent/Guardian does NOT give consent for a referral being sent to the CPSE

*Date of Parent's Decision

Date of Parent's Decision

If no, why?

☐ Revocation of consent for Referral to CPSE

Referral to CPSE Date of Revocation

Upload Consents/Notifications/Revocation

Submit

Transition

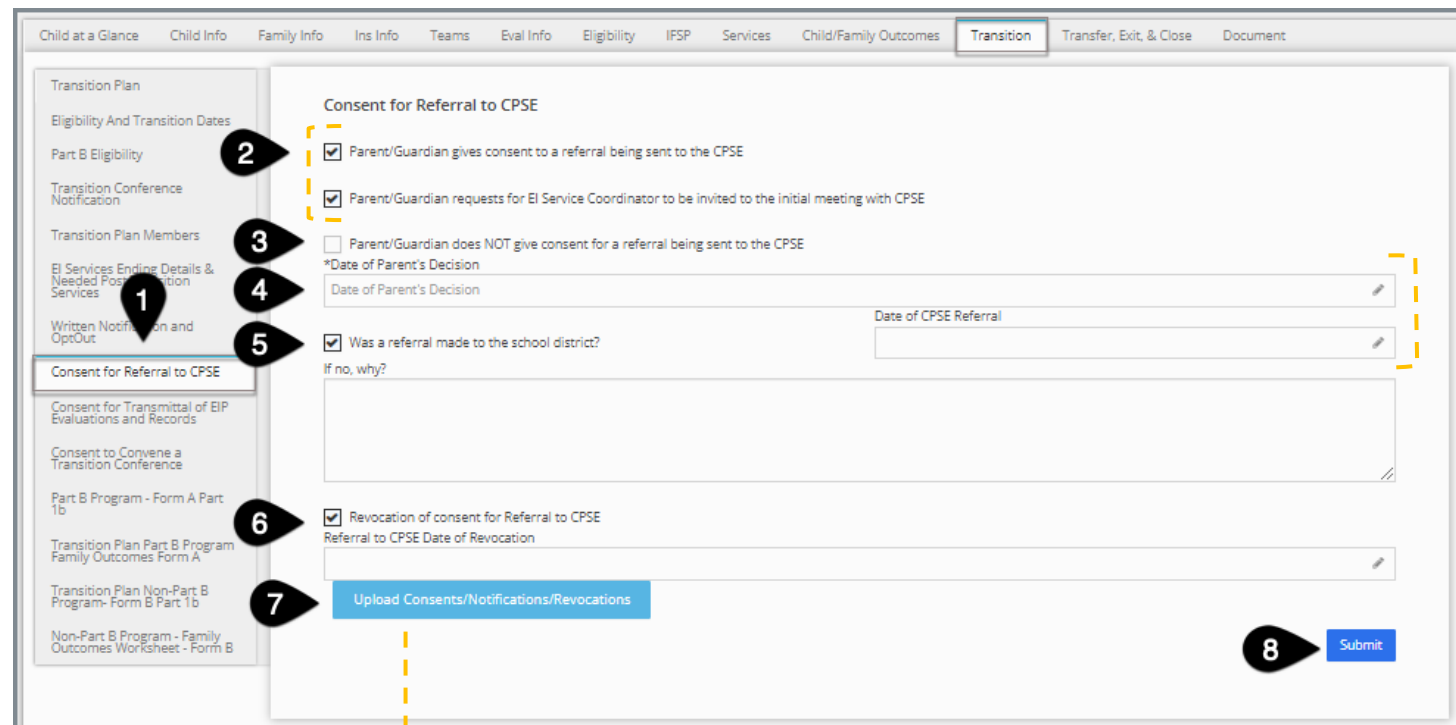
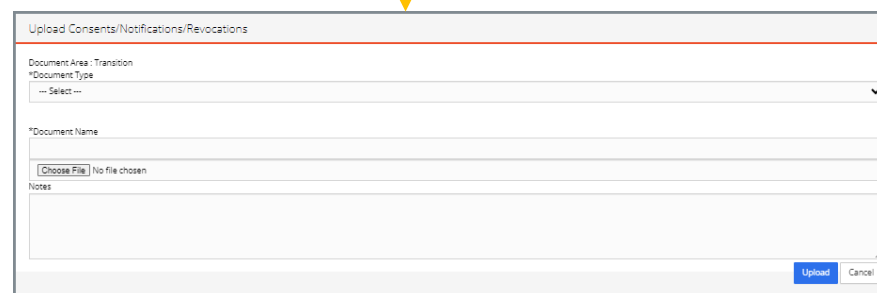
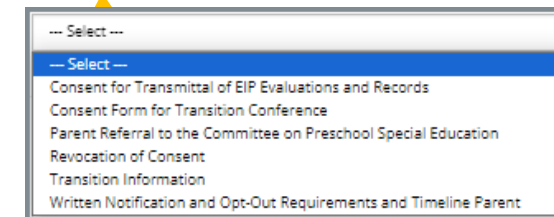
EI Services Ending Details & Post Transition Services

How To

Complete a Consent for Referral to CPSE.

Step / Action

1. Select the **Consent for Referral to CPSE** panel.
2. Select the **'Parent/Guardian gives consent to a referral being sent to the CPSE'** checkbox. If applicable, select the **'Parent/Guardian requests for EI Service Coordinator to be invited to the initial meeting with CPSE'** checkbox.
3. If applicable, select the **'Parent/Guardian does NOT give consent for a referral being sent to the CPSE'** checkbox.
4. Enter the **'Date of Parent's Decision.'** The date can be entered manually or selected using the calendar feature. If applicable, enter the **Date of CPSE Referral**.
5. If the **'Parent/Guardian gives consent to a referral being sent to the CPSE'** checkbox is selected, select **'Was a referral made to the school district'** checkbox, if applicable. If the checkbox for **'Was a referral was not made to the school district,'** enter a brief reasoning in the **'If no, why?'** textbox,
6. If applicable, select the **Revocation of Consent for Referral to CPSE** checkbox. Enter **'Referral to CPSE Date of Revocation.'**
7. Next, select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** popup panel appears, allowing you to select and upload relevant document types.
8. Select the **Submit** button.

Transition

Consent for Transmittal of EIP Evaluations and Records

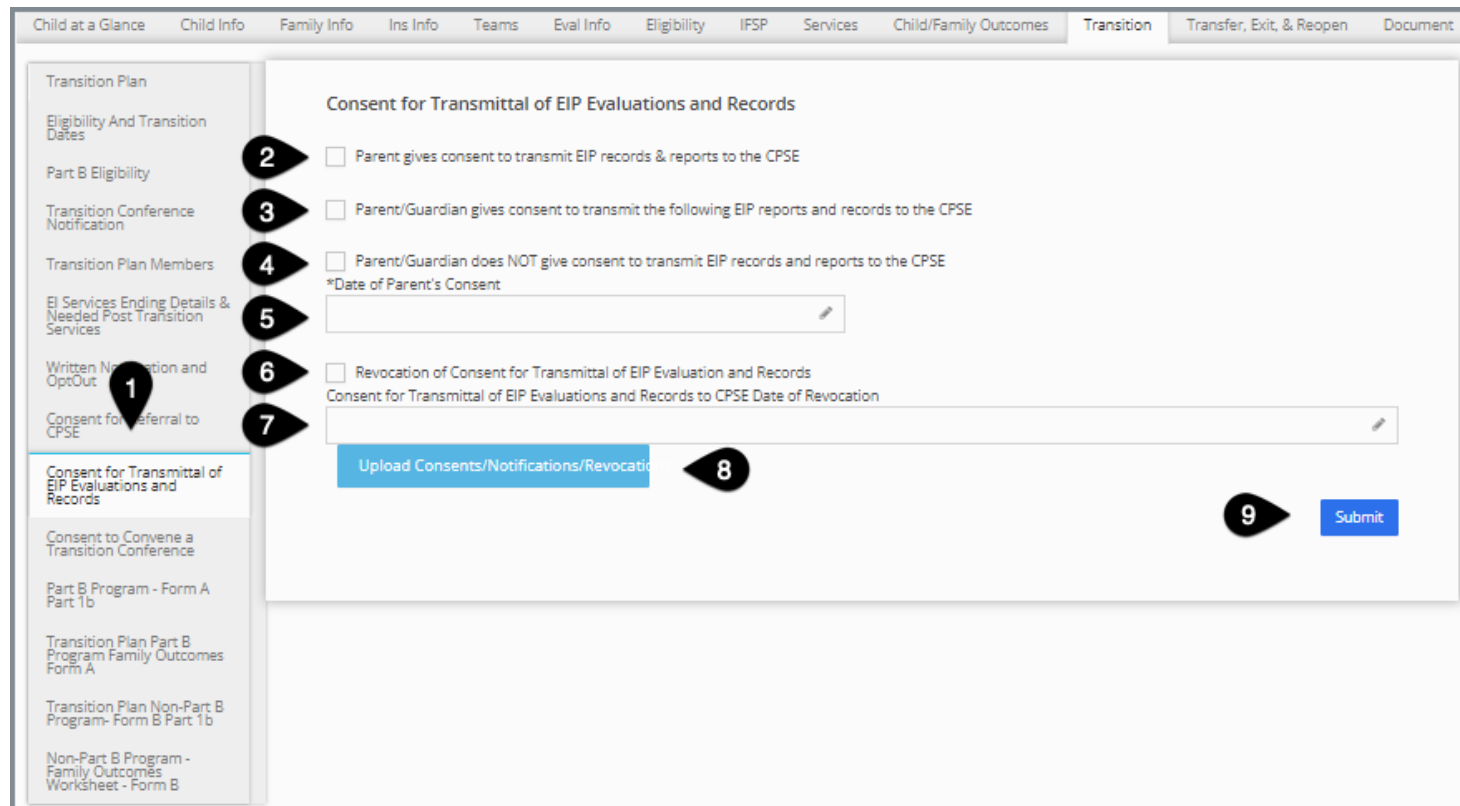
How To

Complete a Consent for Transmittal of EIP Evaluations and Records.



Note

- For this slide, the screenshot shows the default screen for **Consent for Transmittal of EIP Evaluations and Records**. ISC or OSC will discuss transition options with parents or guardians. They will choose one of three choices based on the first three checkboxes.
- Selecting some checkboxes on this page will allow additional checkboxes, fields, and drop-downs to appear.
- The **Consent for Transmittal of EIP Evaluations and Records to CPSE** does not need to be checked. You should enter the revocation date if there is one.



The screenshot shows a web application interface with a top navigation bar and a left sidebar. The main content area is titled 'Consent for Transmittal of EIP Evaluations and Records'. The sidebar contains a list of menu items, with 'Consent for Transmittal of EIP Evaluations and Records' highlighted. The main form contains three checkboxes, a date field, and a revocation section. Numbered callouts (1-9) point to specific elements: 1 points to the 'Consent for Transmittal of EIP Evaluations and Records' checkbox; 2 points to the first checkbox; 3 points to the second checkbox; 4 points to the third checkbox; 5 points to the date field; 6 points to the 'Revocation of Consent' checkbox; 7 points to the revocation date field; 8 points to the 'Upload Consents/Notifications/Revocations' button; and 9 points to the 'Submit' button.

Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Reopen Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

Consent for Transmittal of EIP Evaluations and Records

☐ Parent gives consent to transmit EIP records & reports to the CPSE

☐ Parent/Guardian gives consent to transmit the following EIP reports and records to the CPSE

☐ Parent/Guardian does NOT give consent to transmit EIP records and reports to the CPSE

*Date of Parent's Consent

☐ Revocation of Consent for Transmittal of EIP Evaluation and Records

Consent for Transmittal of EIP Evaluations and Records to CPSE Date of Revocation

Upload Consents/Notifications/Revocations

Submit

Transition

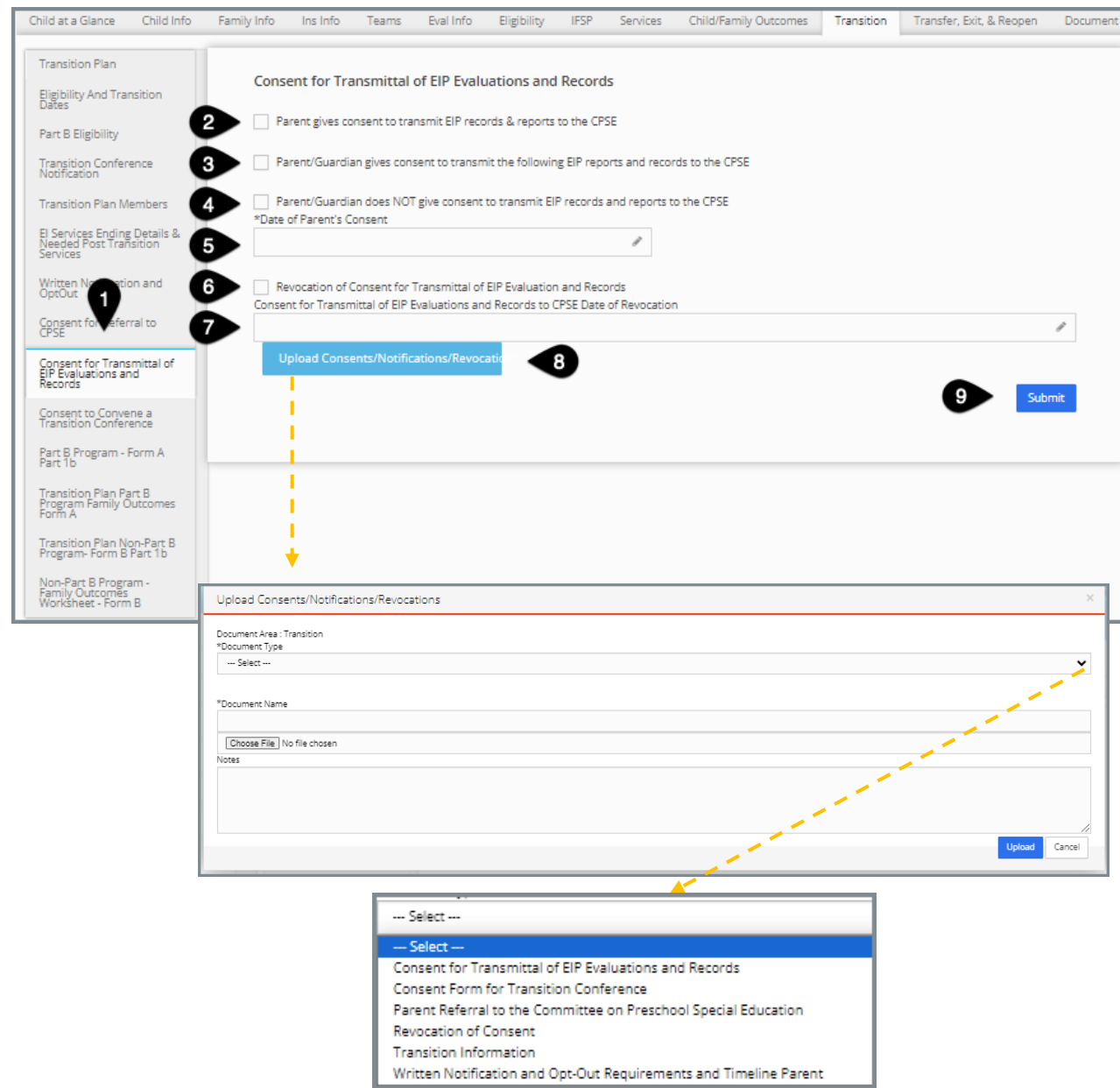
Consent for Transmittal of EIP Evaluations and Records

How To

Complete a Consent for Transmittal of EIP Evaluations and Records.

Step / Action

1. Select the **Consent for Transmittal of EIP Evaluation and Record** panel.
2. If applicable, select the '**Parent gives consent to transmit EIP records & reports to the CPSE**' checkbox. Enter the **Date Transmitted**.
3. If applicable, select the '**Parent/Guardian gives consent to transmit the following EIP reports and records to the CPSE**' checkbox. Enter the '**Forms to be transmitted** and '**Date Transmitted**' fields.
4. If applicable, select the '**Parent/Guardian does NOT give consent to transmit EIP records and reports to the CPSE**' checkbox.
5. Enter the '**Date of Parent's Consent**'.
6. If applicable, select the '+**Revocation of Consent for Transmittal of EIP Evaluation and Records**' checkbox.
7. If applicable, enter the name of the person giving the '**Consent for Transmittal of EIP Evaluations and Records to CPSE Date of Revocation**' text field.
8. Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** popup panel appears, allowing you to select and upload relevant document types.
9. Select the **Submit** button.



The screenshot displays the 'Consent for Transmittal of EIP Evaluations and Records' form within the EI-Hub application. The sidebar on the left lists various navigation options, with 'Consent for Transmittal of EIP Evaluations and Records' highlighted. The main form area contains several sections with checkboxes and text input fields, numbered 1 through 9. A blue button labeled 'Upload Consents/Notifications/Revocations' is visible, which triggers a popup window. This popup window, titled 'Upload Consents/Notifications/Revocations', contains a dropdown menu for 'Document Type', a text field for 'Document Name', and a 'Choose File' button. A list of document types is shown below the text field, including 'Consent for Transmittal of EIP Evaluations and Records', 'Consent Form for Transition Conference', 'Parent Referral to the Committee on Preschool Special Education', 'Revocation of Consent', 'Transition Information', and 'Written Notification and Opt-Out Requirements and Timeline Parent'. The 'Upload' and 'Cancel' buttons are at the bottom right of the popup.

Transition

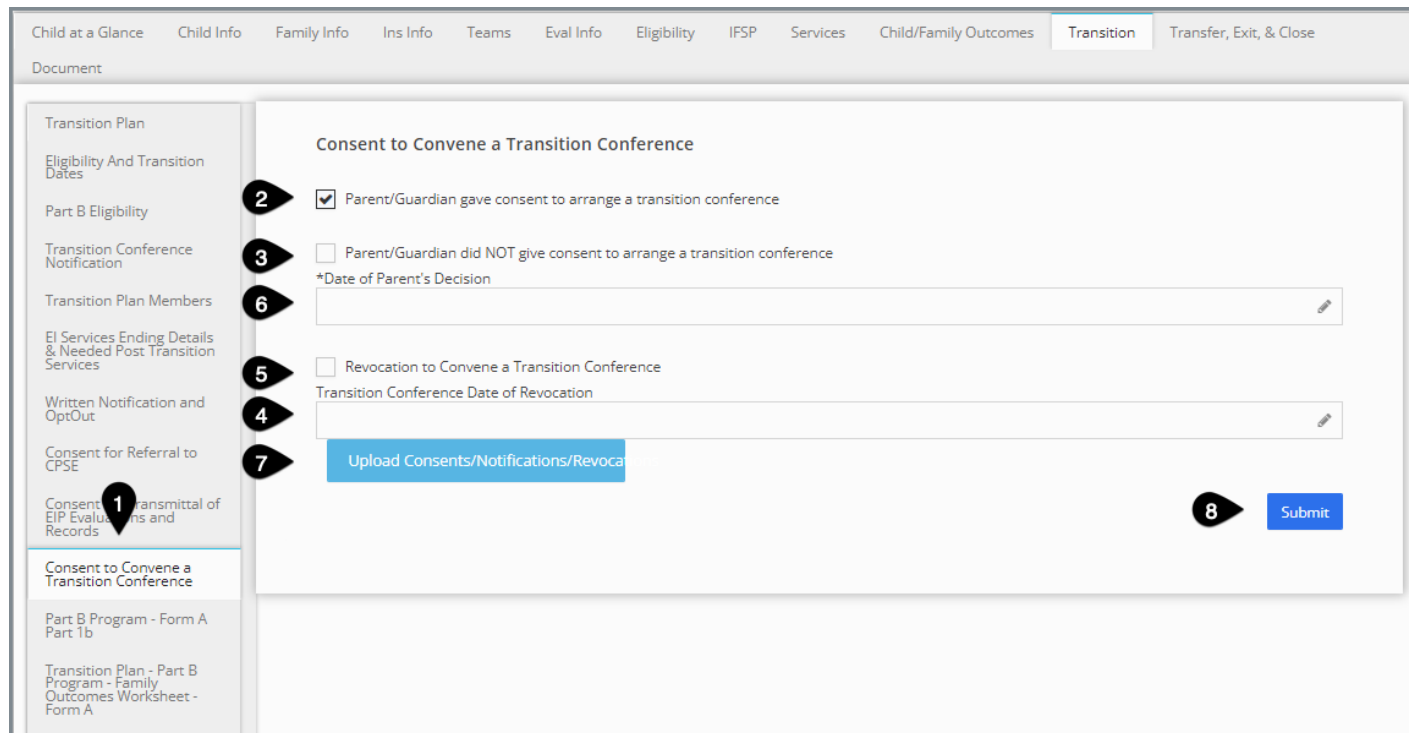
Consent to Convene a Transition Conference

How To

Complete a 'Consent to Convene a Transition Conference.'

Note

- This slide contains the default landing page screenshot for **Consent to Convene a Transition Conference**. Parents or guardians will either give or not give consent to arrange a transition conference for their child.
- Selecting some checkboxes on this page will allow additional checkboxes, fields, and drop-downs to appear.



The screenshot shows a web application interface for a transition conference. The top navigation bar includes tabs for Child at a Glance, Child Info, Family Info, Ins Info, Teams, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition (selected), and Transfer, Exit, & Close. Below this is a 'Document' section with a list of items: Transition Plan, Eligibility And Transition Dates, Part B Eligibility, Transition Conference Notification, Transition Plan Members, EI Services Ending Details & Needed Post Transition Services, Written Notification and OptOut, Consent for Referral to CPSE, Consent for Transmittal of EIP Evaluations and Records (highlighted with callout 1), Consent to Convene a Transition Conference (highlighted with callout 2), Part B Program - Form A Part 1b, and Transition Plan - Part B Program - Family Outcomes Worksheet - Form A. The main content area is titled 'Consent to Convene a Transition Conference' and contains the following elements:

- Callout 2: A checked checkbox for 'Parent/Guardian gave consent to arrange a transition conference'.
- Callout 3: An unchecked checkbox for 'Parent/Guardian did NOT give consent to arrange a transition conference'.
- Callout 6: A text input field for '*Date of Parent's Decision'.
- Callout 5: An unchecked checkbox for 'Revocation to Convene a Transition Conference'.
- Callout 4: A text input field for 'Transition Conference Date of Revocation'.
- Callout 7: A blue button labeled 'Upload Consents/Notifications/Revoca'.
- Callout 8: A blue button labeled 'Submit'.

Transition

Consent to Convene a Transition Conference

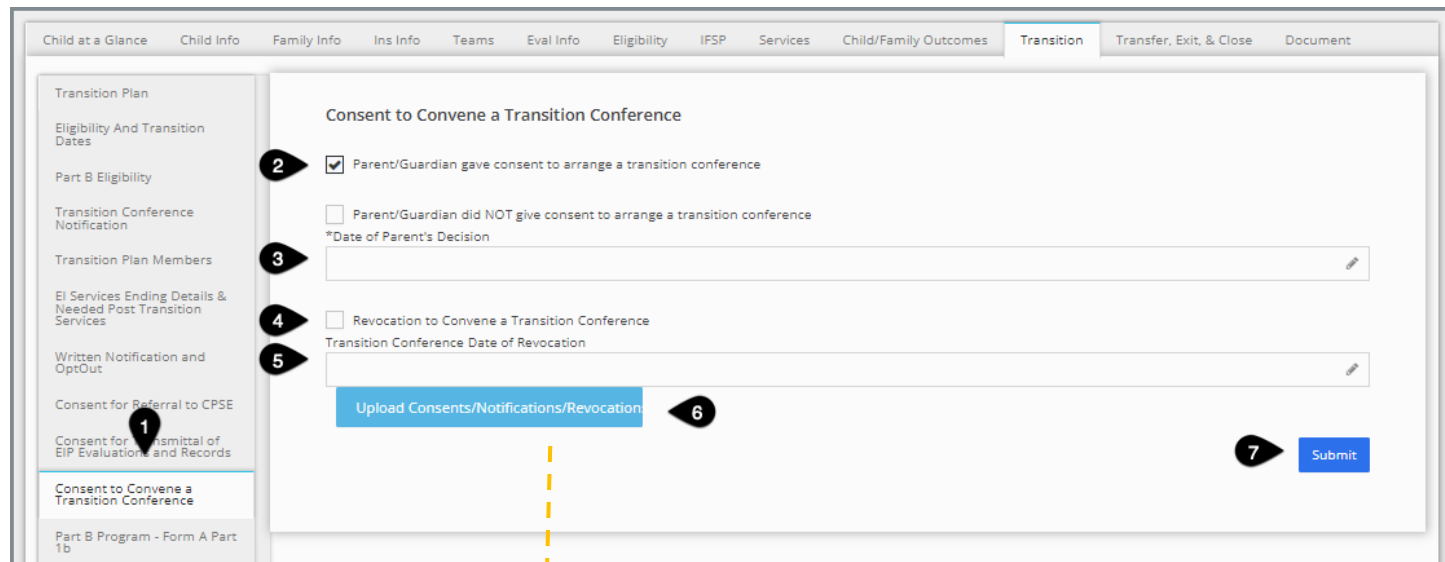
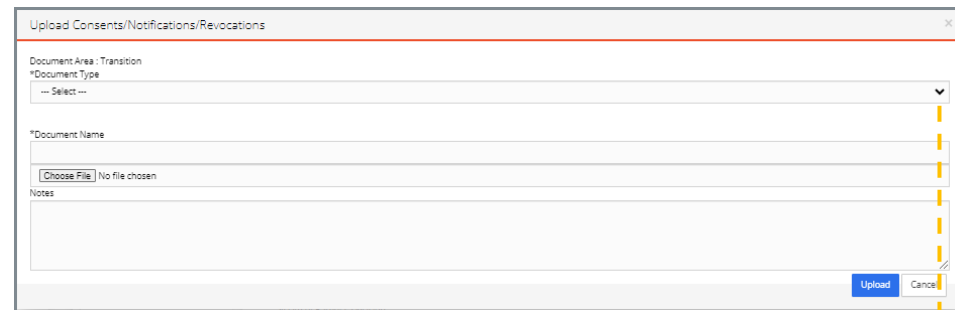
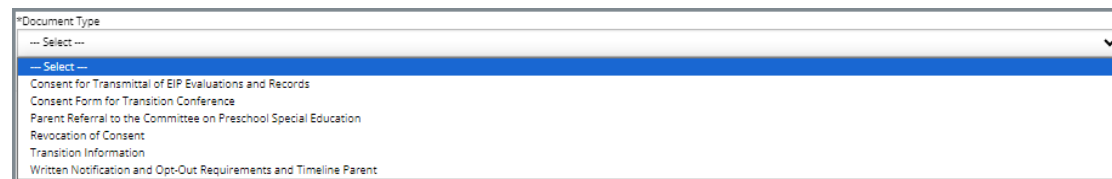
How To

Complete a Consent to Convene a Transition Conference.

Option 1: Parent/Guardian gave consent to arrange a transition conference.

Step / Action

1. Select the **Consent to Convene a Transition Conference** panel.
2. Select '**Parent/Guardian gave consent to arrange a transition conference**' checkbox.
3. Enter the '**Date of Parent's Decision**.' This date can be entered manually or selected using the calendar feature. This is a required field.
4. If applicable, complete the checkbox for '**Revocation to Convene a Transition Conference**.'
5. If applicable, enter a '**Transition Conference Date of Revocation**.' This date can be entered manually or selected using the calendar feature.
6. If applicable, select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** popup panel appears, allowing you to select and upload relevant document types.
7. Select the **Submit** button.

Transition

Consent to Convene a Transition Conference

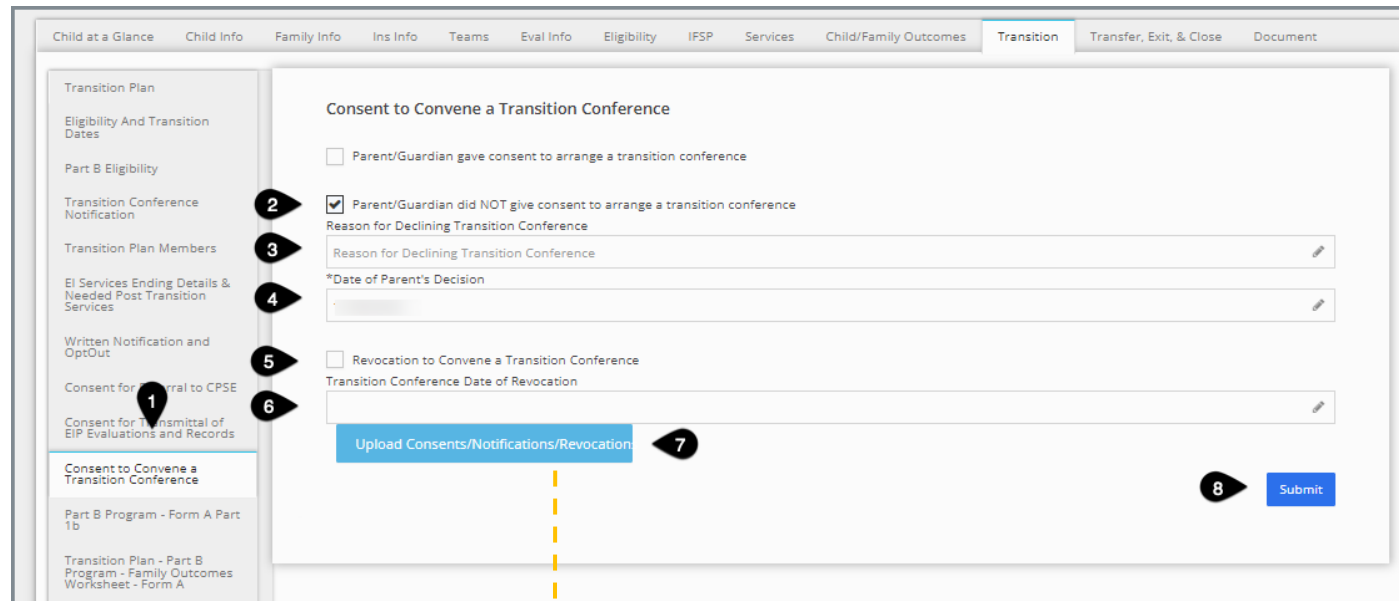
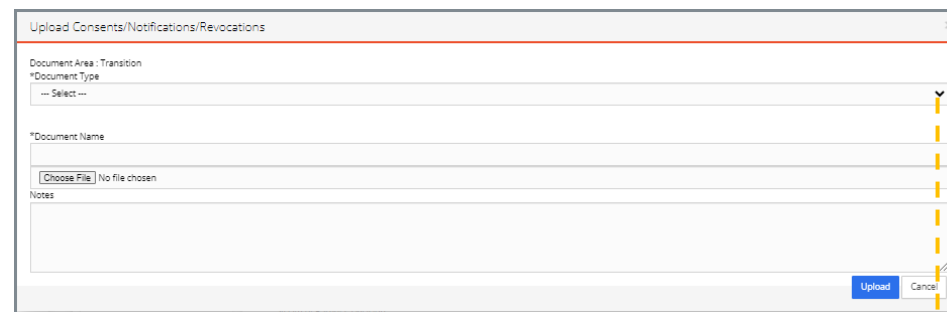
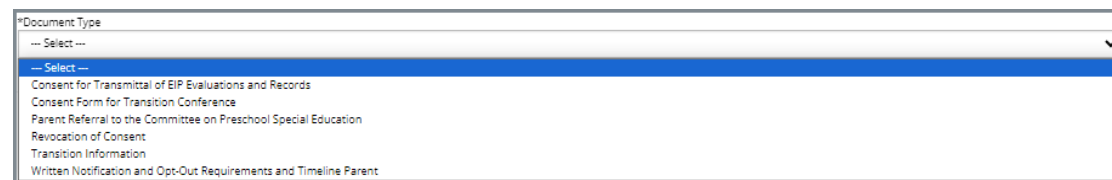
How To

Complete a Consent to Convene a Transition Conference.

Option 2: Parent/Guardian did not give consent to arrange a transition conference.

Step / Action

1. Select the **Consent to Convene a Transition Conference** panel.
2. Select '**Parent/Guardian did NOT consent to arrange a transition conference**' checkbox.
3. Enter the '**Reason for Declining Transition Conference.**' If no reason was provided, you enter "N/A" in the field.
4. Enter the '**Date of Parent's Decision.**' This date can be entered manually or selected using the calendar feature. This is a required field.
5. If applicable, select the '**Revocation to Convene a Transition Conference**' checkbox.
6. If applicable, enter a '**Transition Conference Date of Revocation.**' This date can be entered manually or selected using the calendar feature.
7. If applicable, Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** popup panel appears, allowing you to select and upload relevant document types.
8. Select the **Submit** button.

Transition

Part B & Non-Part B

How To

Interpret Transition Form Types.

About Transition Forms Part B/Non-Part B

- **Part B of IDEA** (Individuals with Disabilities Education Act) requires public schools to provide assessments and specialized instruction/services to individuals with disabilities ages 3 to 21. Services may include, but are certainly not limited to, speech-language therapy, physical therapy, and occupational therapy.
- Children who will transition out of Early Intervention and receive these services within a public education setting are said to be transitioning to a Part B Program.
- Children are likely to transition without Part B services within a public education setting, transitioning from Early Intervention into Non-Part B programs such as general education or privately funded support services.
- The Transition Panel houses **two** (2) form types:
 - Transition Checklist Completion Form
 - Family Outcomes form.
- Both form types (mentioned above) are provided to Children who **are** transitioning and who **are not** transitioning to Part B programs/services.
- The Transition Plans Form A and B are **optional** tools. Service Coordinators may use these forms to guide their children and families through the transition process. Service Coordinators can enter pertinent information into the panels as necessary.
- These forms should be updated at each subsequent IFSP Meeting/Review.

Forms for Children Transitioning to Part B Programs.

Part B Program -
Form A Part 1b

Transition Plan
Part B Program
Family Outcomes
Form A

Transition Plan
Non-Part B
Program- Form B
Part 1b

Non-Part B
Program - Family
Outcomes
Worksheet - Form
B

Forms for Children not Transitioning to Part B Programs.

Transition

Part B Program – Form A Part 1b

How To

Complete the Transition Plan Checklist.

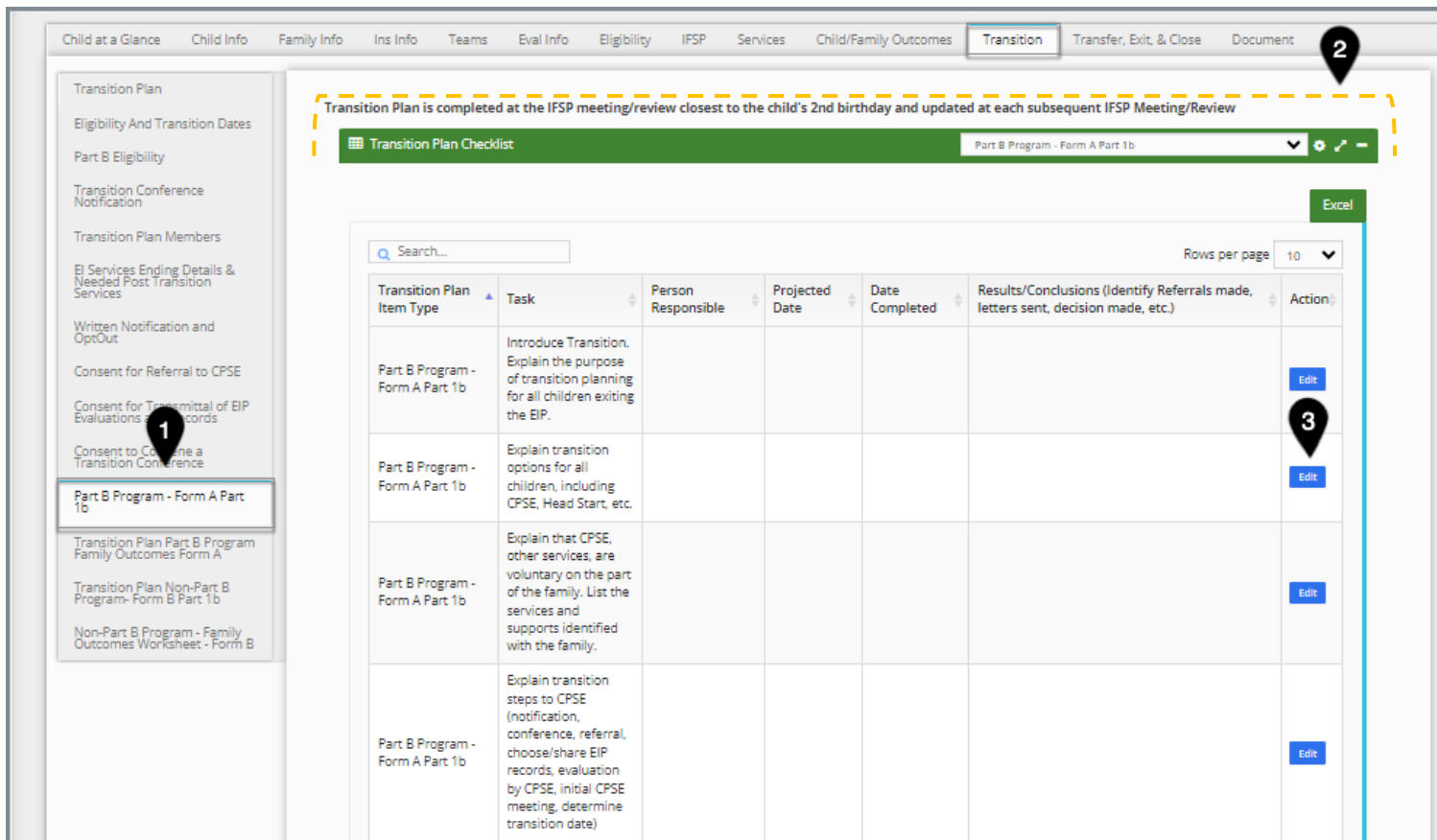
Note

Please remember that for Transition Plan information to populate into the Transition form panels (i.e., Part B Program – Form A Part 1b), users **must** indicate they wish to start a transition plan record. Please refer to pg. 5 for a refresher.

Step / Action

1. Select the **Part B Program – Form A Part 1b** panel.
2. Transition tasks can be viewed in the **Transition Plan Checklist** grid.
3. Select **Edit** to update a Transition task.

Continued next page...



Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Close Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

IF Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

Transition Plan is completed at the IFSP meeting/review closest to the child's 2nd birthday and updated at each subsequent IFSP Meeting/Review

Transition Plan Checklist Part B Program - Form A Part 1b

Excel

Search...

Rows per page 10

Transition Plan Item Type	Task	Person Responsible	Projected Date	Date Completed	Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)	Action
Part B Program - Form A Part 1b	Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP.					Edit
Part B Program - Form A Part 1b	Explain transition options for all children, including CPSE, Head Start, etc.					Edit
Part B Program - Form A Part 1b	Explain that CPSE, other services, are voluntary on the part of the family. List the services and supports identified with the family.					Edit
Part B Program - Form A Part 1b	Explain transition steps to CPSE (notification, conference, referral, choose/share EIP records, evaluation by CPSE, initial CPSE meeting, determine transition date)					Edit

Transition

Part B Program – Form A Part 1b

How To

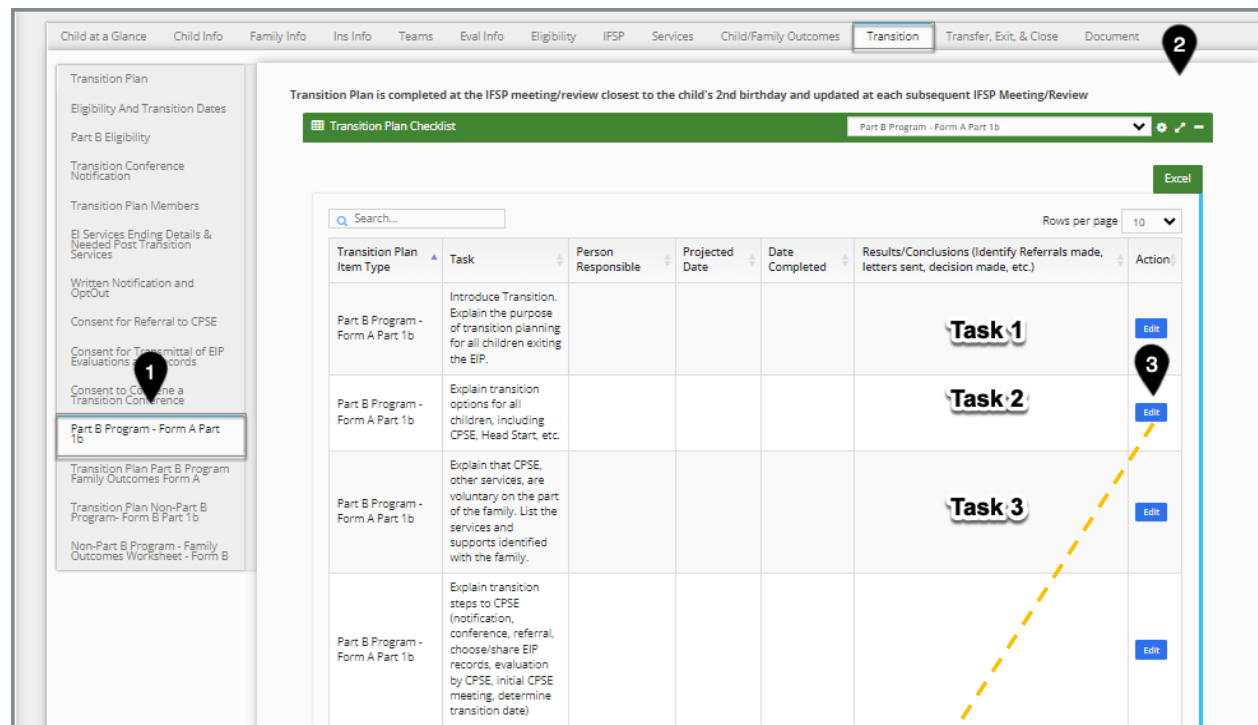
Complete the Transition Plan Checklist.

Note

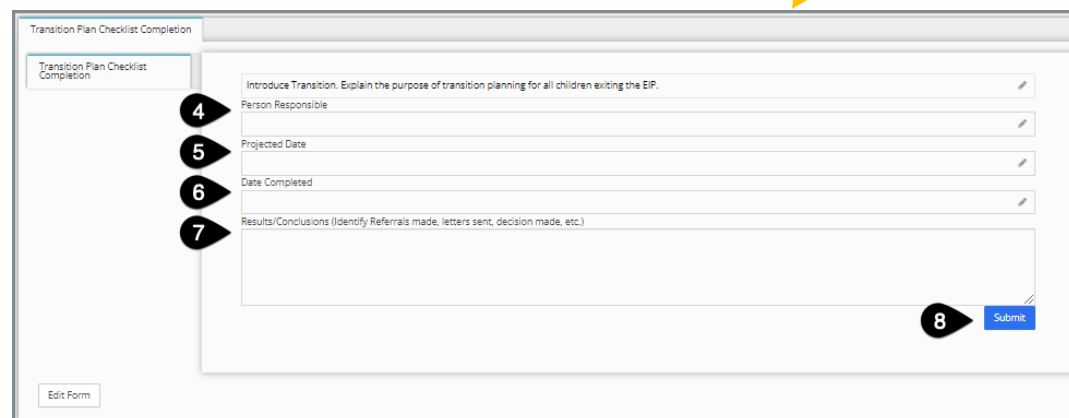
- Repeat this process for each Transition task listed within the **Transition Plan Checklist** grid. For example, if there are 3 tasks, this process **must** be completed 3 times. Please reference the previous slide for assistance in repeating this process.
- Projected Date** is a future date in which the topic will be discussed with the parent or guardian.

Step / Action

- Enter the name of the **Person Responsible**.
- Enter the **Projected Date**.
- Enter the **Date Completed**, if applicable.
- Enter a brief description of the **Results/Conclusion**.
- Select **Submit**.



Transition Plan Item Type	Task	Person Responsible	Projected Date	Date Completed	Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)	Action
Part B Program - Form A Part 1b	Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP.				Task 1	3 Edit
Part B Program - Form A Part 1b	Explain transition options for all children, including CPSE, Head Start, etc.				Task 2	Edit
Part B Program - Form A Part 1b	Explain that CPSE, other services, are voluntary on the part of the family. List the services and supports identified with the family.				Task 3	Edit
Part B Program - Form A Part 1b	Explain transition steps to CPSE (notification, conference, referral, choose/share EIP records, evaluation by CPSE, initial CPSE meeting, determine transition date)					Edit



Transition Plan Checklist Completion

Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP.

4 Person Responsible

5 Projected Date

6 Date Completed

7 Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)

8 Submit

Edit Form

Transition

Transition Plan Part B Program Family Outcomes Form A

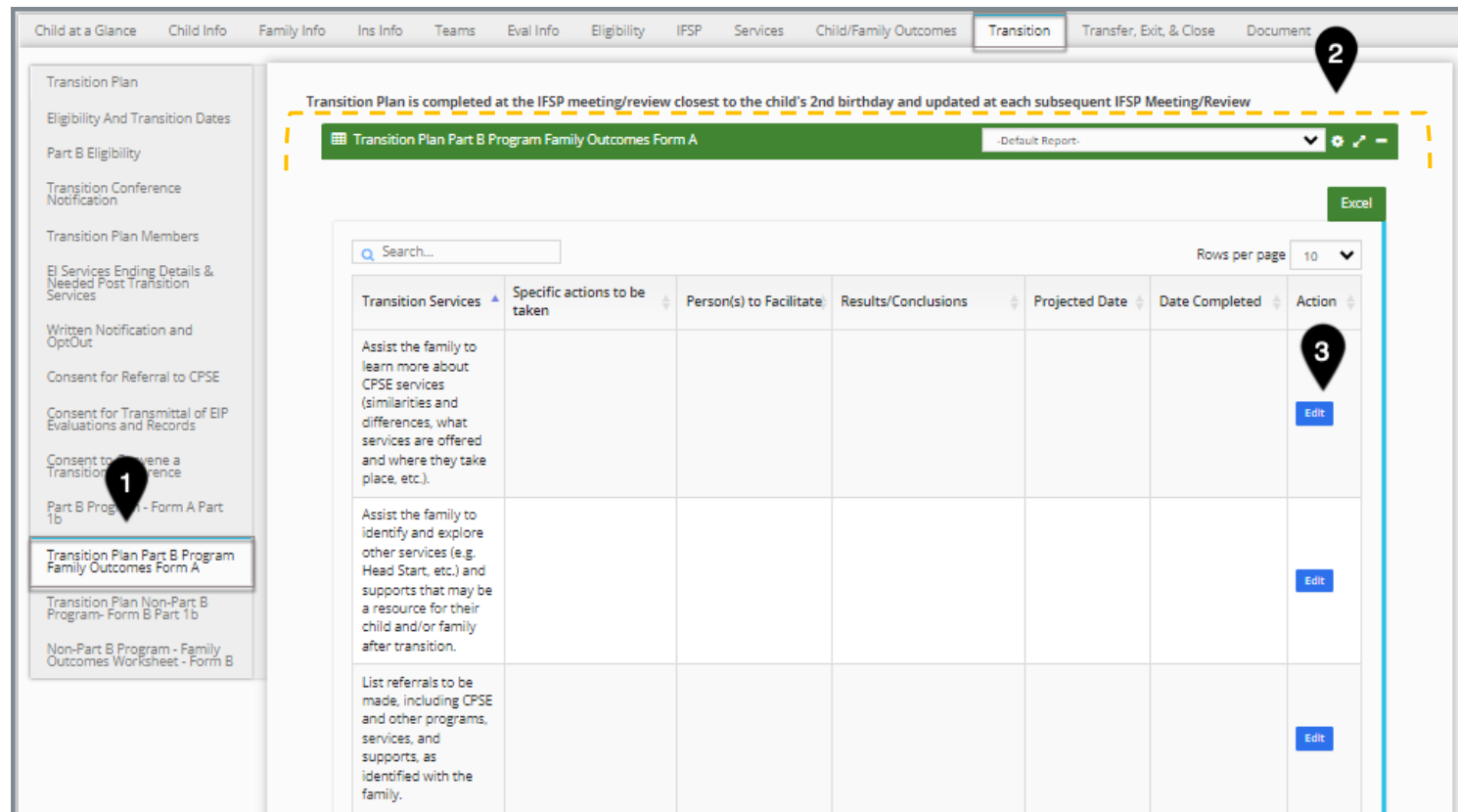
How To

Complete the Transition Plan Checklist.

Step / Action

1. Select the **Transition Plan Part B Program – Family Outcomes Form A** panel (for Children transitioning to CPSE).
2. Transition Services are in the **Transition Plan Part B Program Family Outcomes Form A** grid.
3. Select **Edit** to edit a service.

Continued next page...



The screenshot shows the EI-Hub software interface. The top navigation bar includes tabs for Child at a Glance, Child Info, Family Info, Ins Info, Teams, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, **Transition**, Transfer, Exit, & Close, and Document. A sidebar on the left lists various forms, with 'Transition Plan Part B Program Family Outcomes Form A' highlighted and marked with a '1'. The main content area displays a grid titled 'Transition Plan Part B Program Family Outcomes Form A' with a green header bar. Above the grid, a note states: 'Transition Plan is completed at the IFSP meeting/review closest to the child's 2nd birthday and updated at each subsequent IFSP Meeting/Review'. The grid has columns for Transition Services, Specific actions to be taken, Person(s) to Facilitate, Results/Conclusions, Projected Date, Date Completed, and Action. Three rows of services are listed, each with an 'Edit' button in the Action column, marked with a '3'. A '2' is also present in the top right corner of the grid area.

Transition Services	Specific actions to be taken	Person(s) to Facilitate	Results/Conclusions	Projected Date	Date Completed	Action
Assist the family to learn more about CPSE services (similarities and differences, what services are offered and where they take place, etc.).						Edit
Assist the family to identify and explore other services (e.g. Head Start, etc.) and supports that may be a resource for their child and/or family after transition.						Edit
List referrals to be made, including CPSE and other programs, services, and supports, as identified with the family.						Edit

Transition

Transition Plan Part B Program Family Outcomes Form A

How To

Complete the Transition Plan Checklist.

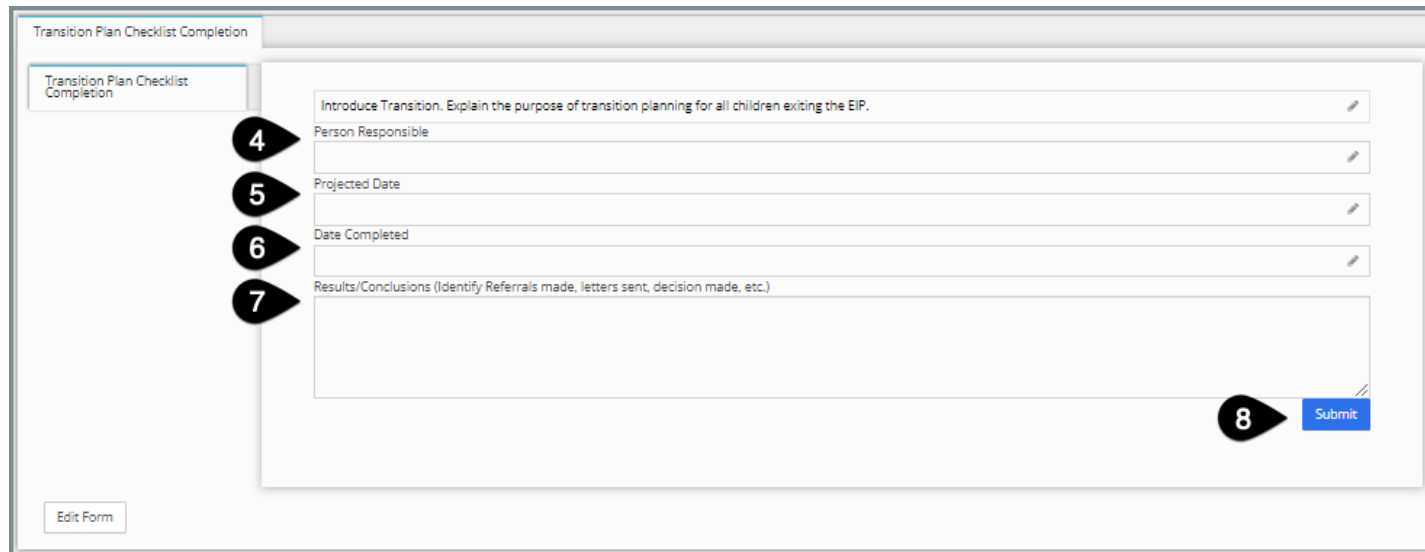


Note

- Asterisks(*) indicate required fields.
- Repeat this process for all services, as necessary.
- **Projected Date** is a future date in which the topic will be discussed with the parent or guardian.

Step / Action

4. Enter the name of the **Person Responsible**.
5. Enter the **Projected Date**.
6. Enter the **Date Completed**, if applicable.
7. Enter a brief description of the Results and/or **Conclusions**.
8. Click **Submit**.



The screenshot shows a web-based form titled "Transition Plan Checklist Completion". The form is divided into several sections, each with a numbered step indicator (4, 5, 6, 7, 8) on the left side. The sections are:

- Step 4:** "Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP." This section has a text input field.
- Step 5:** "Person Responsible" This section has a text input field.
- Step 6:** "Projected Date" This section has a text input field.
- Step 7:** "Date Completed" This section has a text input field.
- Step 8:** "Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)" This section has a large text area for input.

At the bottom right of the form, there is a blue "Submit" button. At the bottom left, there is an "Edit Form" button.

Transition

Transition Plan Non-Part B Program Form B Part 1b

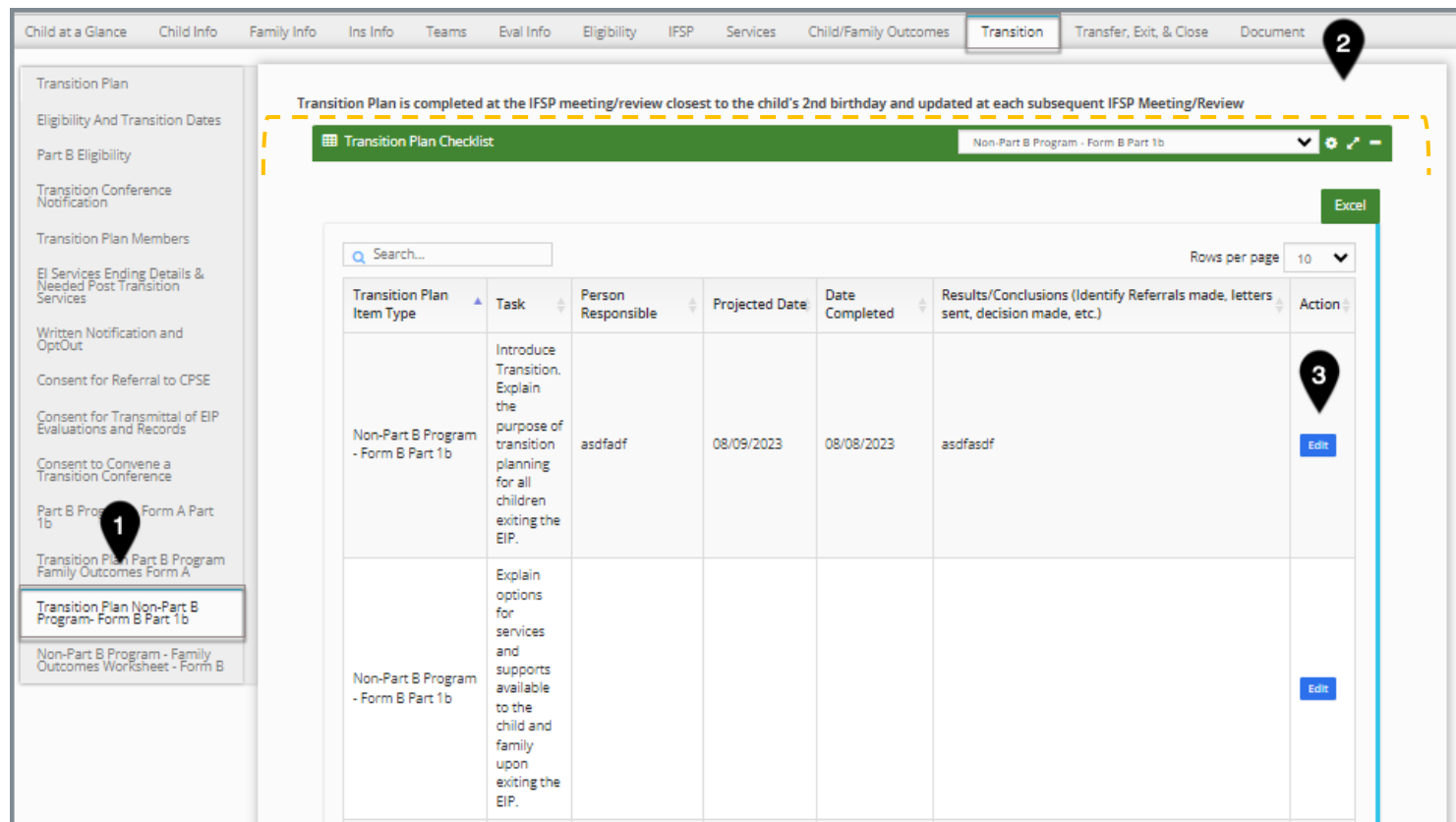
How To

Complete the Transition Plan Checklist.

Step / Action

1. Select **Transition Plan Non-Part B Program – Form B Part 1b** panel (For children NOT transitioning to CPSE).
2. Tasks can be seen in the **Transition Plan** grid.
3. Select **Edit** to edit a task.

Continued next page...



Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Close Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan Part B Program Family Outcomes Form A

Transition Plan Non-Part B Program- Form B Part 1b

Non-Part B Program - Family Outcomes Worksheet - Form B

Transition Plan is completed at the IFSP meeting/review closest to the child's 2nd birthday and updated at each subsequent IFSP Meeting/Review

Transition Plan Checklist

Non-Part B Program - Form B Part 1b

Excel

Search...

Rows per page 10

Transition Plan Item Type	Task	Person Responsible	Projected Date	Date Completed	Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)	Action
Non-Part B Program - Form B Part 1b	Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP.	asdfadf	08/09/2023	08/08/2023	asdfasdf	Edit
Non-Part B Program - Form B Part 1b	Explain options for services and supports available to the child and family upon exiting the EIP.					Edit

Transition

Transition Plan Non-Part B Program Form B Part 1b

How To

Complete the Transition Plan Checklist.

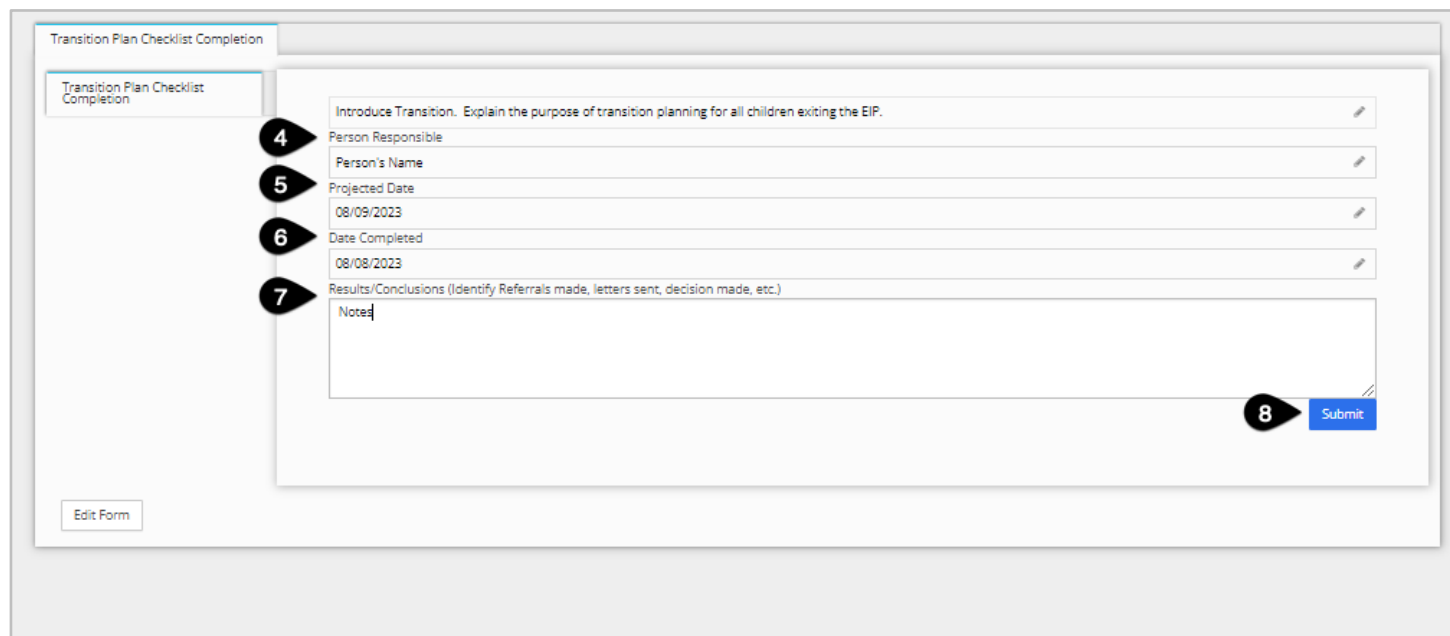


Note

- Repeat this process for all services, as necessary.
- **Projected Date** is a future date in which the topic will be discussed with the parent or guardian.

Step / Action

4. Enter the name of the **Person Responsible**.
5. Enter the **Projected Date**.
6. Enter the **Date Completed**, if applicable.
7. Enter a brief description of the **Results/Conclusions**.
8. Click **Submit**.



The screenshot shows a web-based form titled "Transition Plan Checklist Completion". The form is divided into several sections, each with a numbered step indicator (4, 5, 6, 7, 8) on the left side. The sections are:

- Step 4:** "Introduce Transition. Explain the purpose of transition planning for all children exiting the EIP." (Text area)
- Step 5:** "Person Responsible" (Text field)
- Step 6:** "Person's Name" (Text field)
- Step 7:** "Projected Date" (Text field, value: 08/09/2023)
- Step 8:** "Date Completed" (Text field, value: 08/08/2023)
- Step 9:** "Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)" (Text area, value: Noted)

At the bottom right of the form, there is a blue "Submit" button. At the bottom left, there is an "Edit Form" button.

Transition

Non-Part B Program Family Outcomes Worksheet Form B

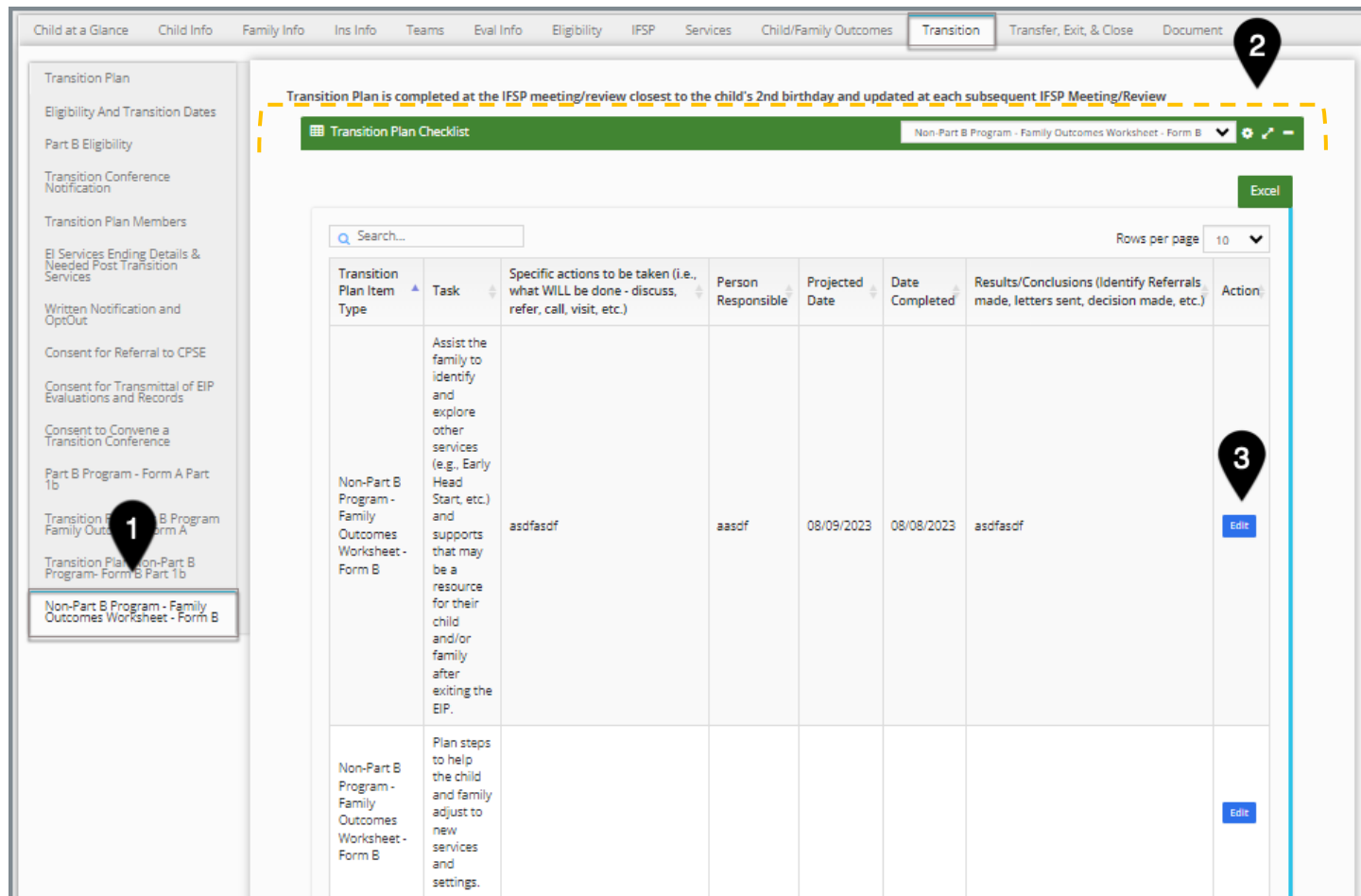
How To

Complete the Transition Plan Checklist.

Step / Action

1. Select **Non- Part B Program Family Outcomes Worksheet Form B** (For children NOT transitioning to CPSE).
2. Tasks can be seen in the **Transition Plan** grid.
3. Select **Edit** to edit a task.

Continued next page ...



Child at a Glance Child Info Family Info Ins Info Teams Eval Info Eligibility IFSP Services Child/Family Outcomes **Transition** Transfer, Exit, & Close Document

Transition Plan

Eligibility And Transition Dates

Part B Eligibility

Transition Conference Notification

Transition Plan Members

EI Services Ending Details & Needed Post Transition Services

Written Notification and OptOut

Consent for Referral to CPSE

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Part B Program - Form A Part 1b

Transition Plan - Non-Part B Program - Form A

Transition Plan - Non-Part B Program - Form B

Non-Part B Program - Family Outcomes Worksheet - Form B

Transition Plan is completed at the IFSP meeting/review closest to the child's 2nd birthday and updated at each subsequent IFSP Meeting/Review

Transition Plan Checklist

Non-Part B Program - Family Outcomes Worksheet - Form B

Excel

Search...

Rows per page 10

Transition Plan Item Type	Task	Specific actions to be taken (i.e., what WILL be done - discuss, refer, call, visit, etc.)	Person Responsible	Projected Date	Date Completed	Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)	Action
Non-Part B Program - Family Outcomes Worksheet - Form B	Assist the family to identify and explore other services (e.g., Early Head Start, etc.) and supports that may be a resource for their child and/or family after exiting the EIP.	asdfasdf	asdf	08/09/2023	08/08/2023	asdfasdf	Edit
Non-Part B Program - Family Outcomes Worksheet - Form B	Plan steps to help the child and family adjust to new services and settings.						Edit

Transition

Non-Part B Program Family Outcomes Worksheet Form B

How To

Complete the Transition Plan Checklist.

Note

- Repeat this process for all tasks, as necessary
- Projected Date** is a future date in which the topic will be discussed with the parent or guardian.

Step / Action

- Enter the **Specific Actions to be taken**.
- Enter the name of the **Person Responsible**.
- Enter the **Projected Date**.
- Enter the **Date Completed**, if applicable.
- Enter a brief description of the **Results/Conclusions**.
- Select **Submit**.

Transition Plan Checklist Completion

Transition Plan Checklist Completion

4

Assist the family to identify and explore other services (e.g., Early Head Start, etc.) and supports that may be a resource for their child and/or family after exiting the EIP.
*Specific actions to be taken (i.e., what WILL be done - discuss, refer, call, visit, etc.)

5

Discuss topic x, y and z

6

Person Responsible

7

Person's Name

8

Projected Date

9

08/09/2023

10

Date Completed

11

08/08/2023

12

Results/Conclusions (Identify Referrals made, letters sent, decision made, etc.)

Notes

9 Submit

Revision History

Version Number	Release Date	Author	Revision Summary
v.1	3.15.2022	Matthew O'Brien	First Draft Release
v.2	6.18.2022	Courtney Pittman	Second Draft Release
v.3	7.29.2022	Courtney Pittman	Final Draft Release
v.4	9.22.2022	Courtney Pittman	Post-Final Review
v.5	10.4.2022	Courtney Pittman	Post-Post Final Review
V.6	06/23/2023	Jessica Yorkman	Resolved Comments
V.7	8/30/23	Matthew O'Brien	Added page 11
V.8	09/05/2023	Jessica Yorkman	Updated Screenshots
V.9	10/11/2023	Jessica Yorkman	Update content based on UAT findings
v.10	11/06/2023	Jessica Yorkman	Updated content based on review comments
v.11	11/07/2023	Jessica Yorkman	Final formatting and review