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

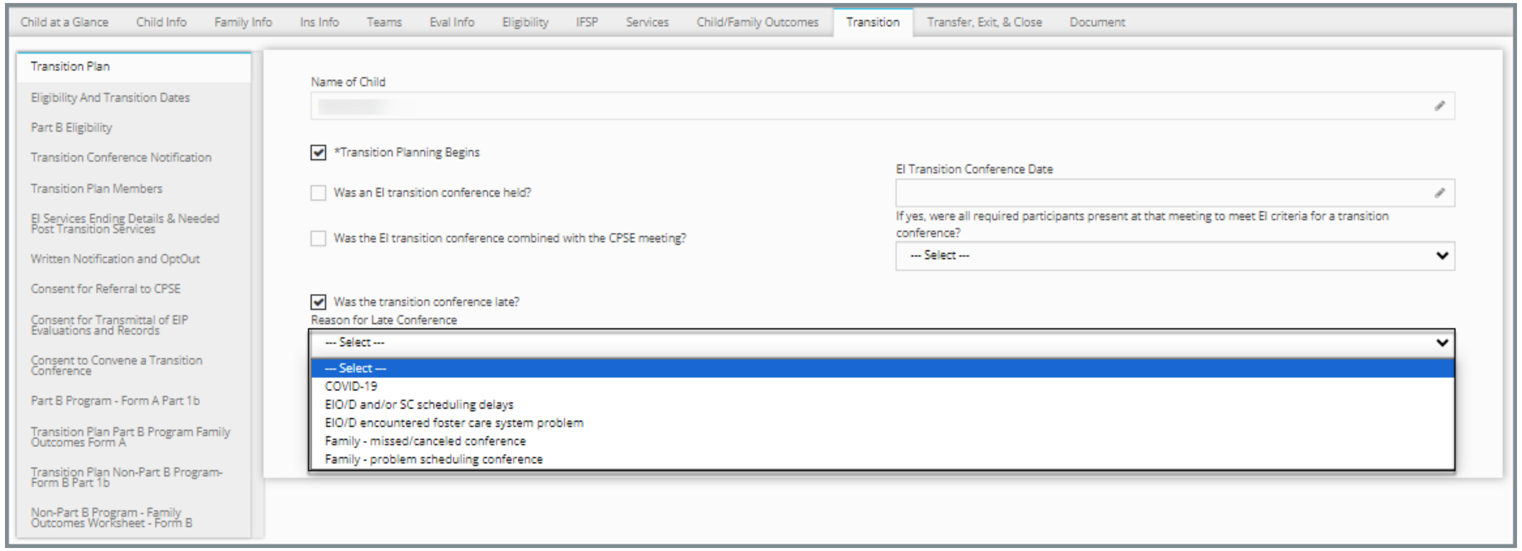
Transition Plan

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.



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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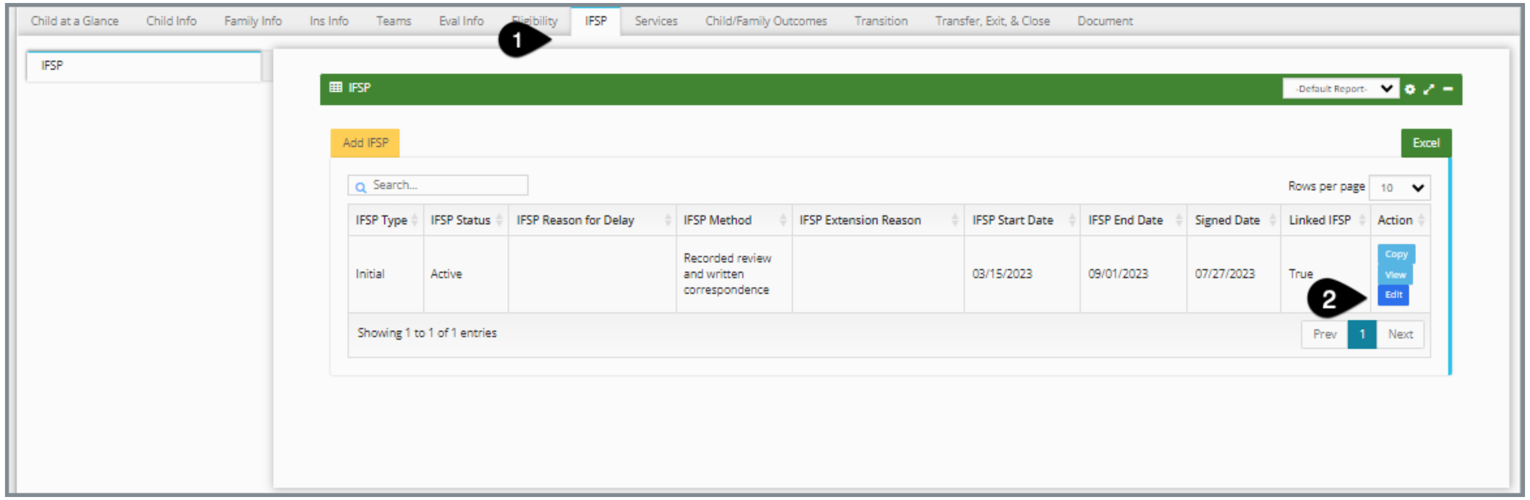


Transition

Transition Discussion

How To

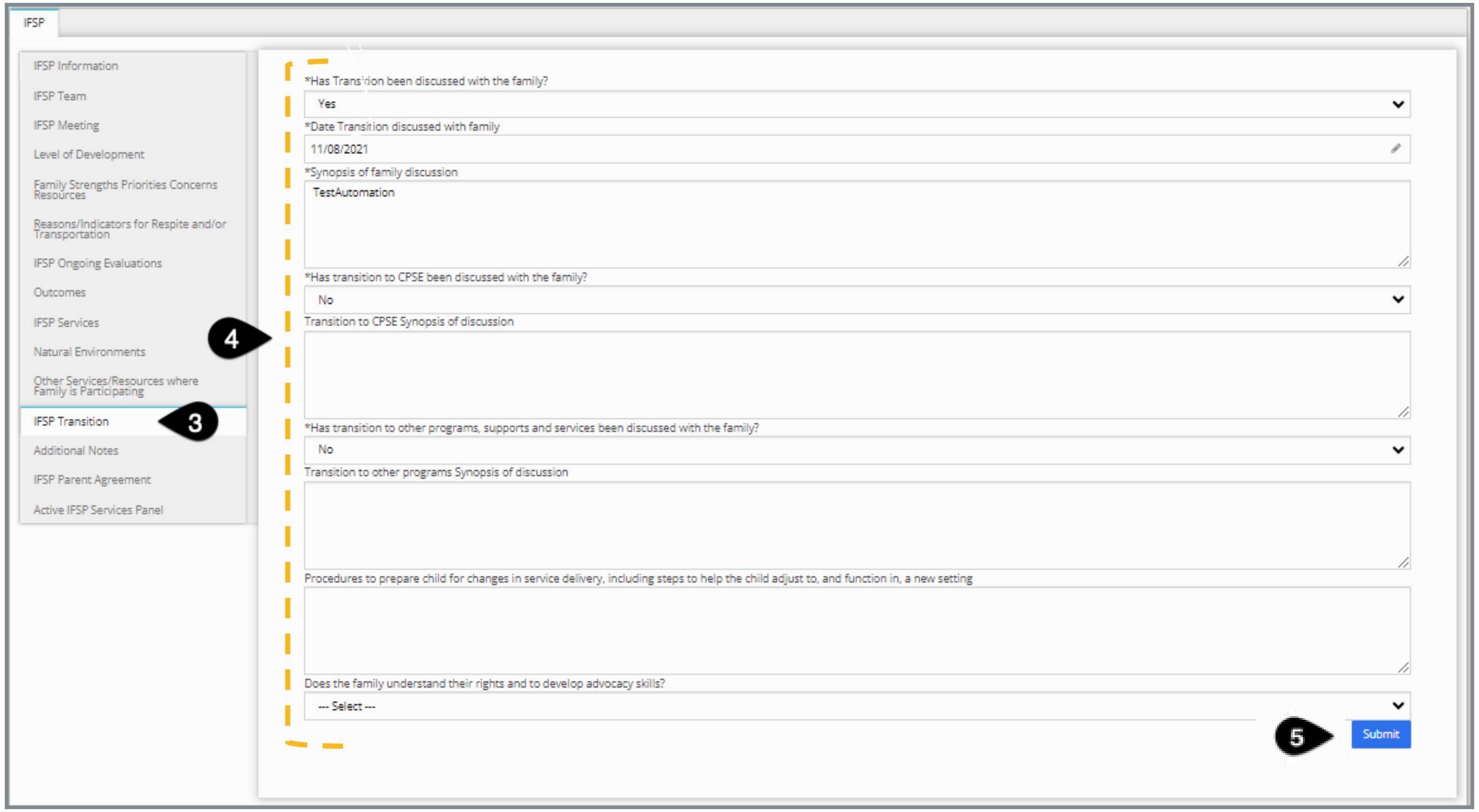
Enter Transition Discussion Details on an IFSP.

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.



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

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

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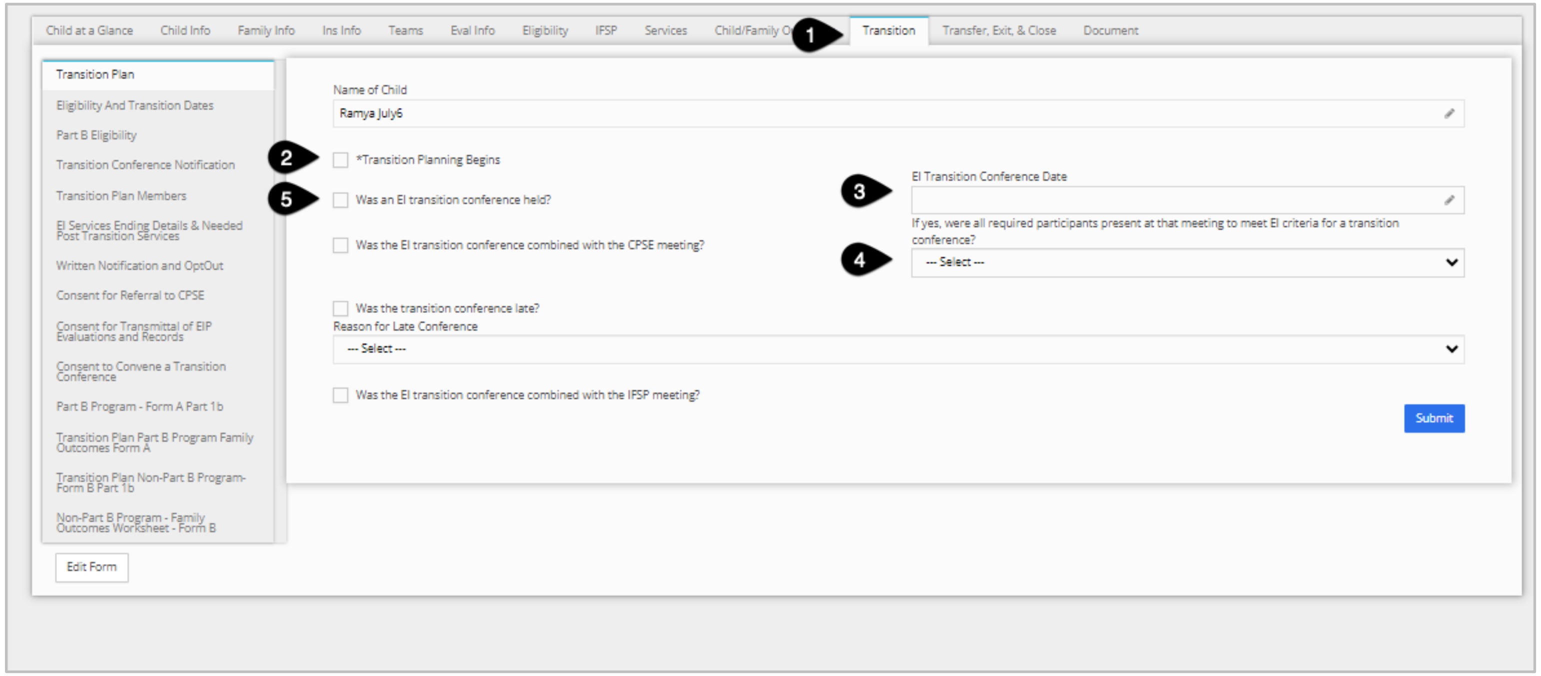


Transition

Transition Plan

How To

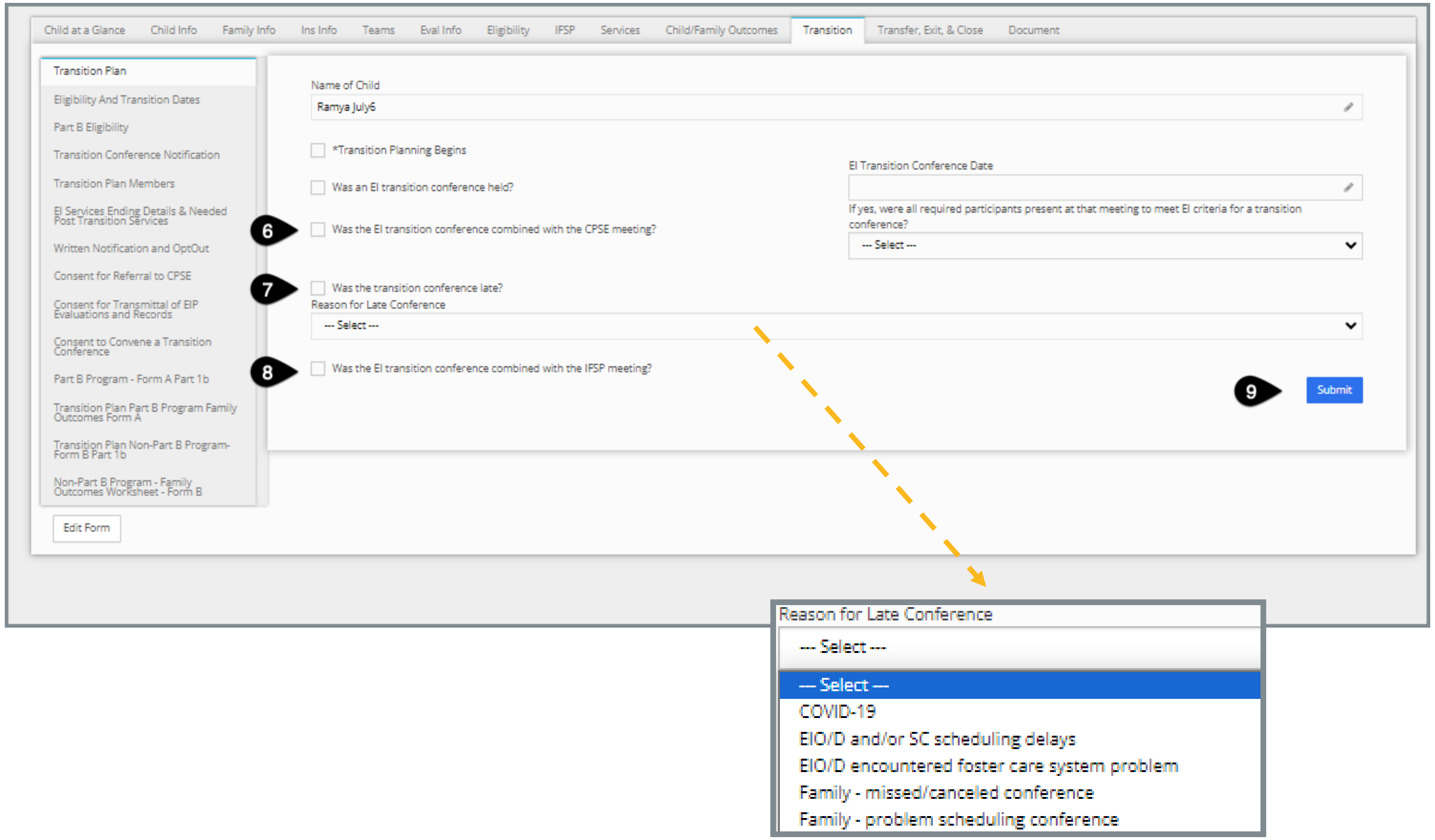
Start a Transition Record.

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

6. If applicable, select '**Was the EI transition conference combined with the CPSE Meeting?**' checkbox.
7. 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.
8. If applicable, select '**Was the EI transition conference combined with the IFSP meeting?**' checkbox.
9. Select the **Submit** button.



Transition

Eligibility And Transition Dates

How To

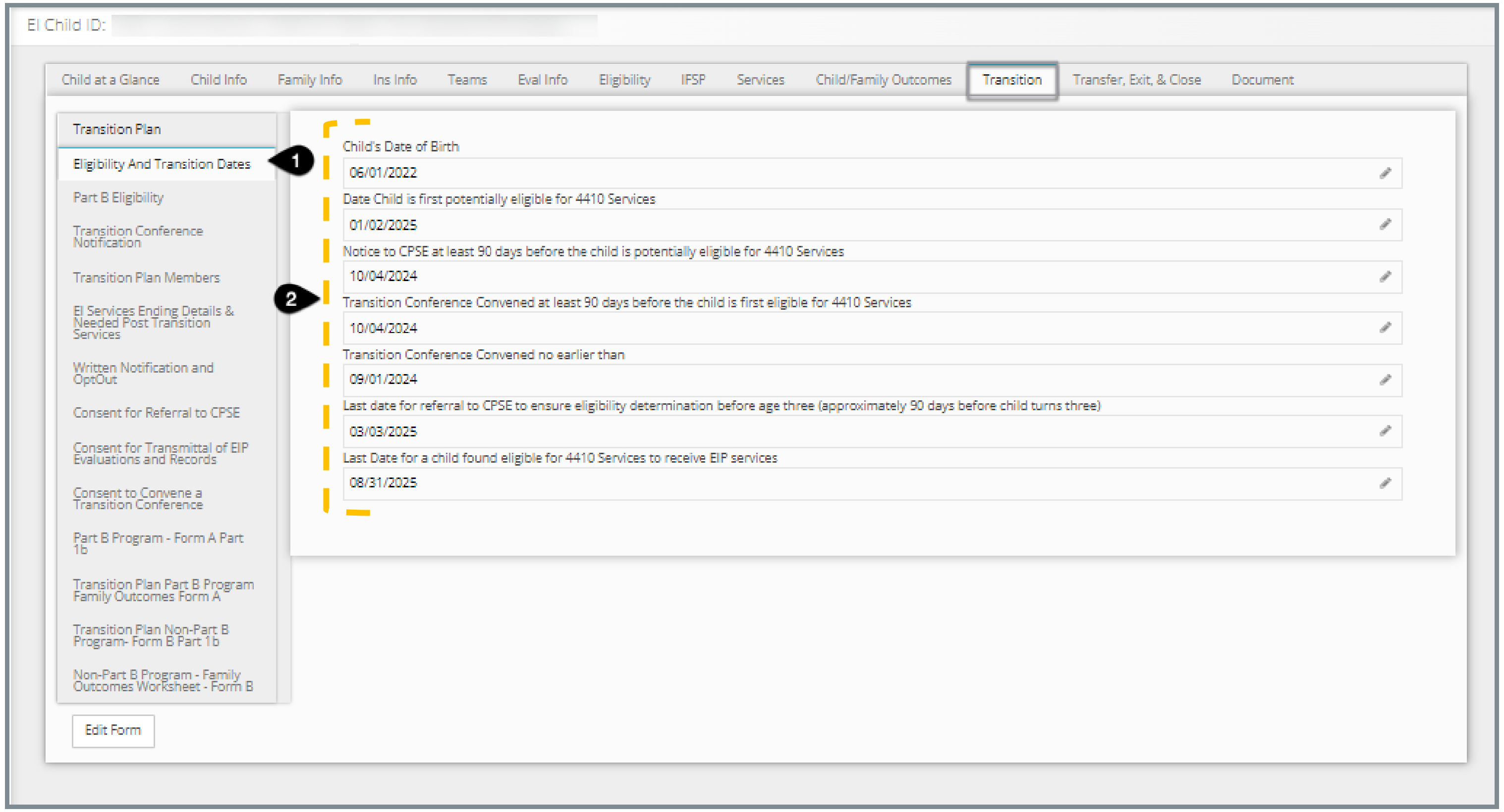
View Important Eligibility and Transition dates.

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

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



Transition

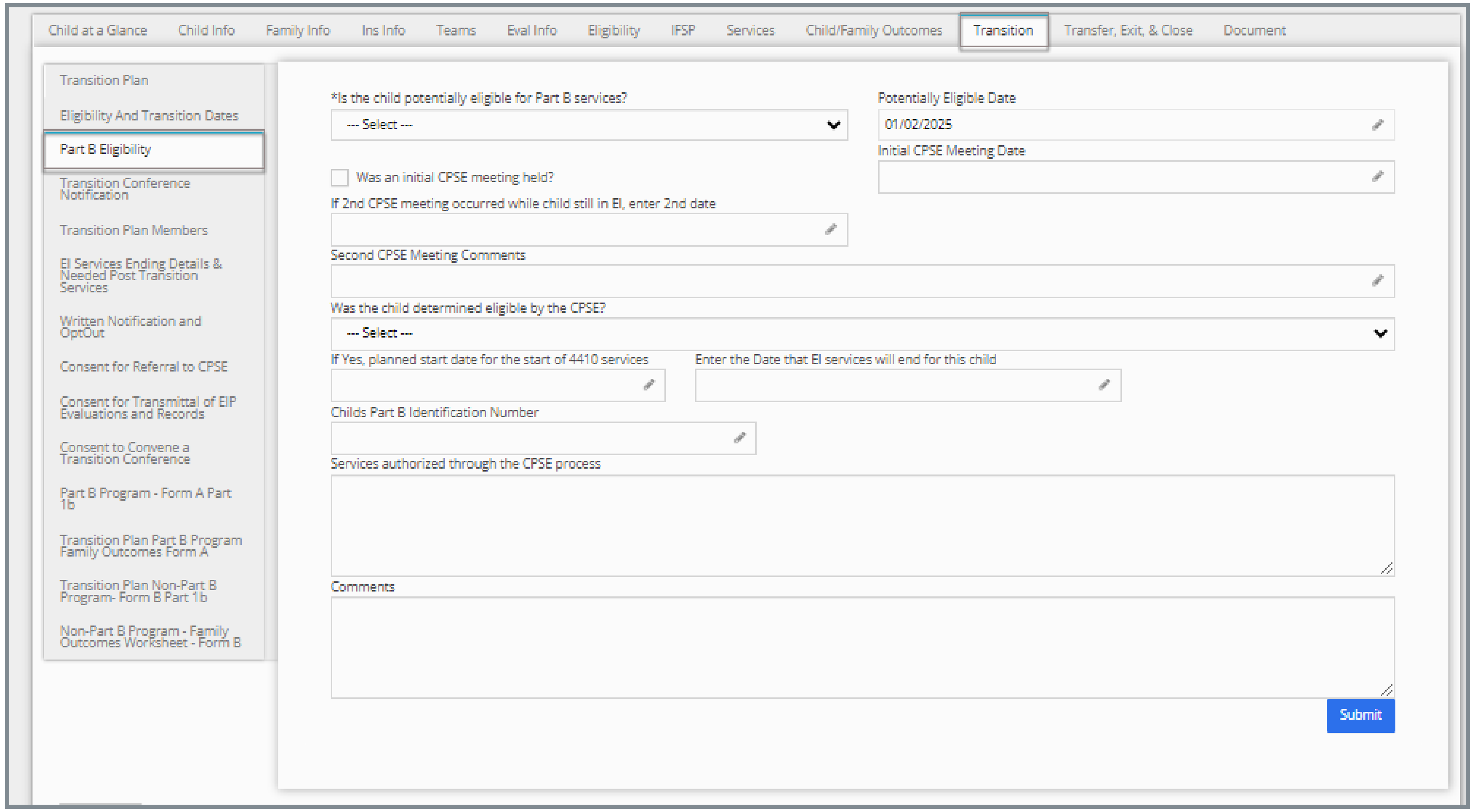
Part B Eligibility

How To

View and Edit Part B Eligibility.

Note

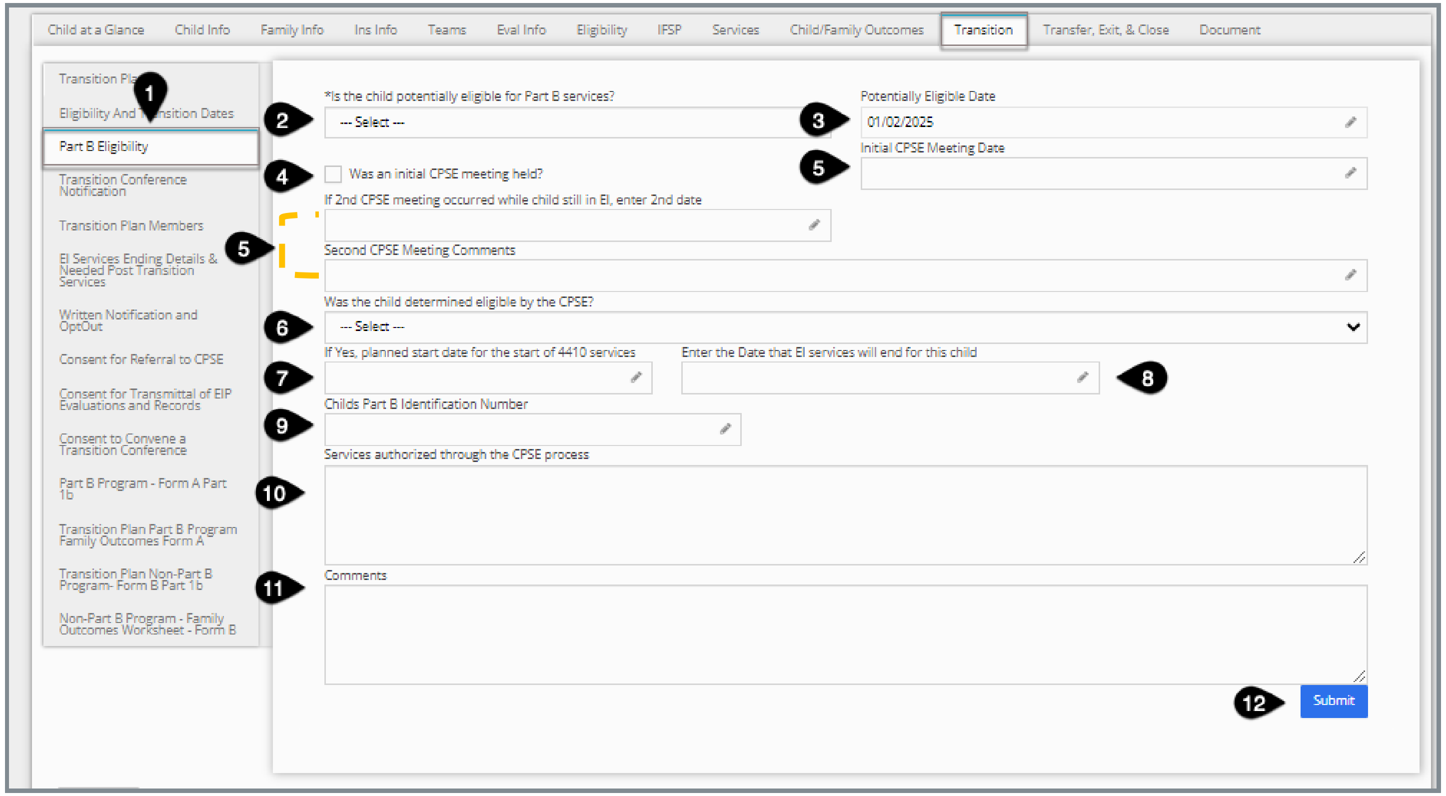
- Auto-populated dates are a feature of Case Management. This feature removes the work of manually tracking and calculating dates.
- Eligibility and Transition dates align with '[The EIP to 4410 Calculator](#).'
- **Please note that** the 'Childs Part B Identification Number' field is generated (ID number) 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.**



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**.



Transition

Transition Conference Notification

How To

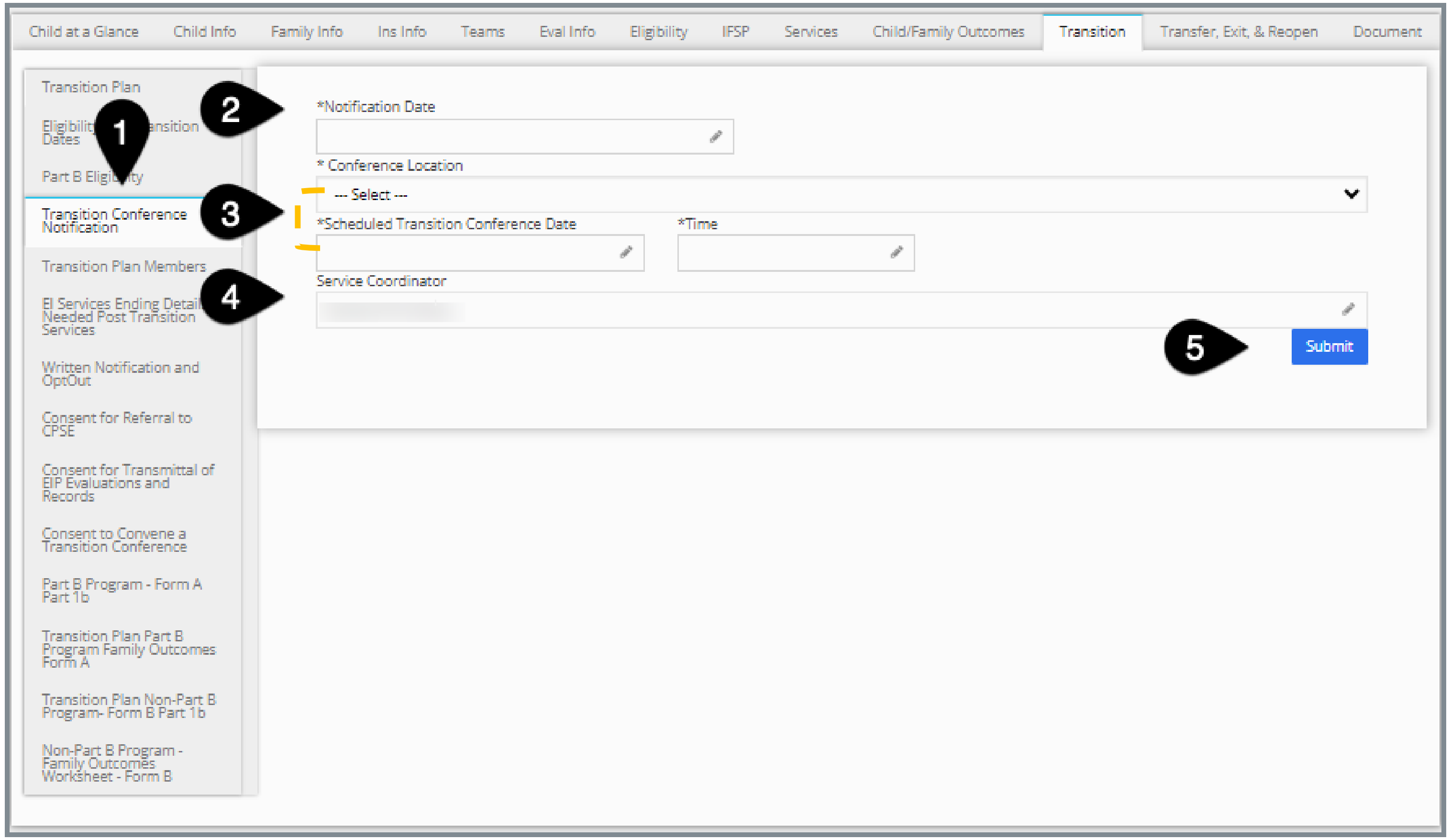
View and Edit a Transition Conference Notification.

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**.



Transition

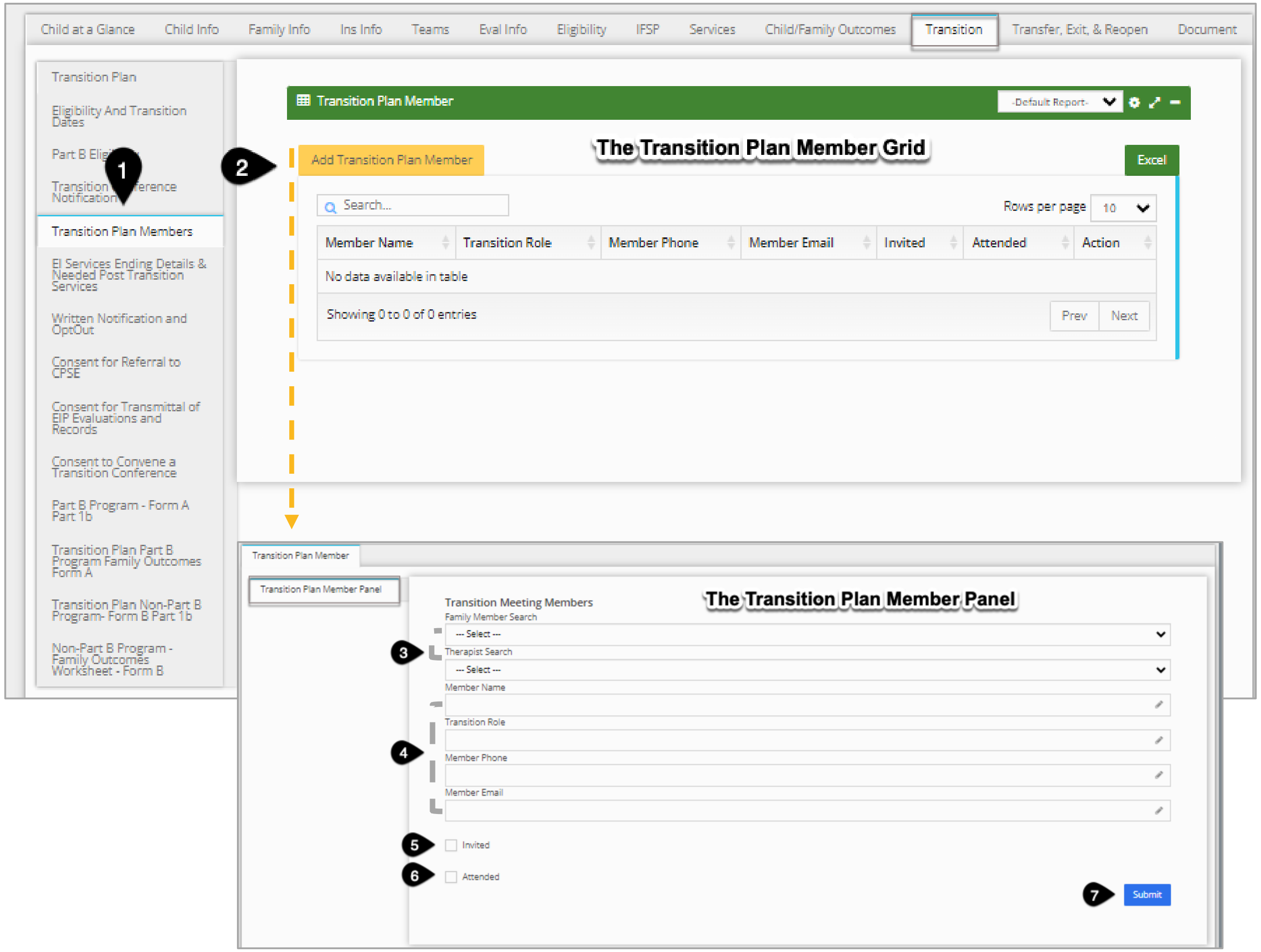
Transition Plan Members

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.



Transition

Transition Plan Members

How To

View and Enter Transition Plan Members.

Option 1: When using Family Member Search

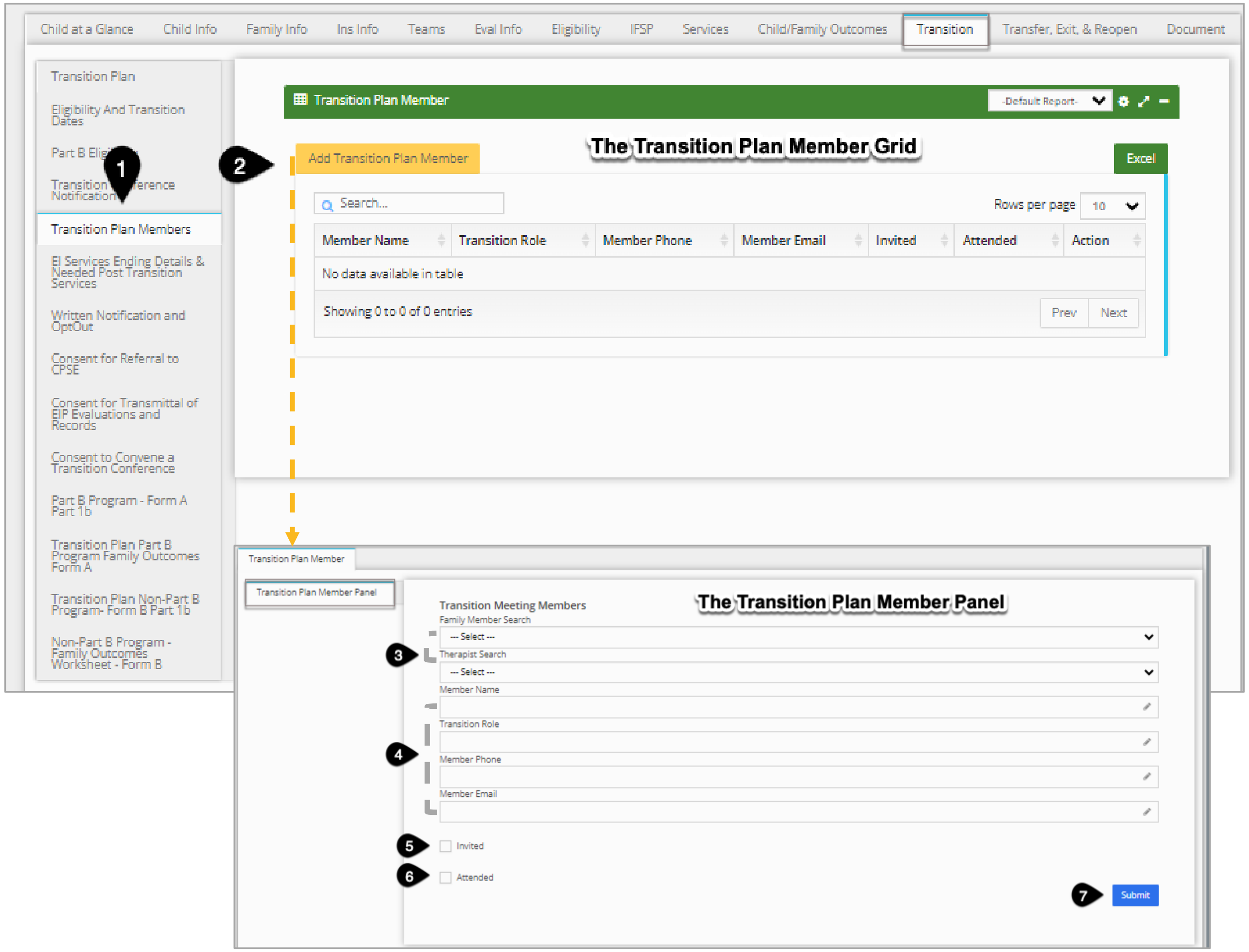
Step / Action

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.



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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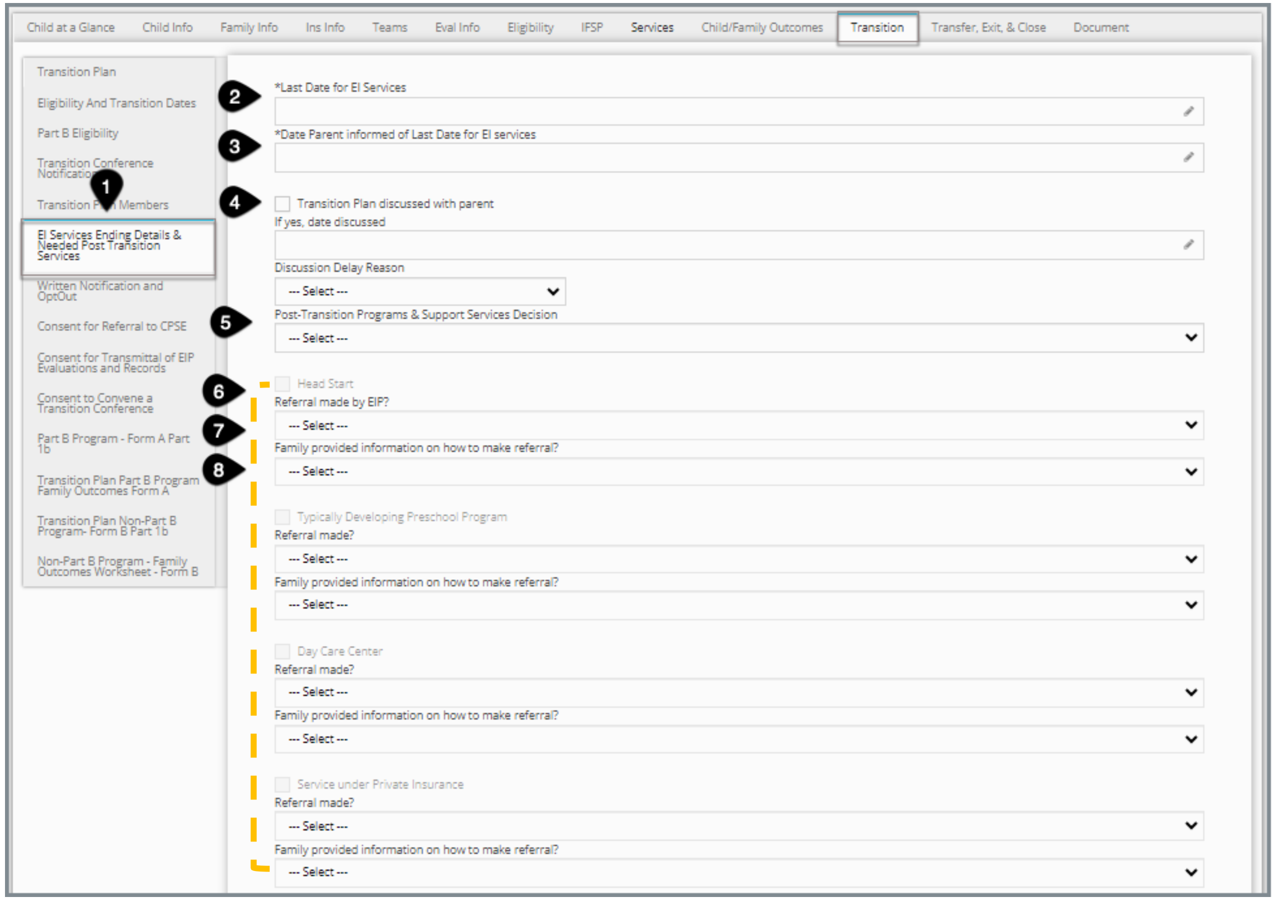


Transition

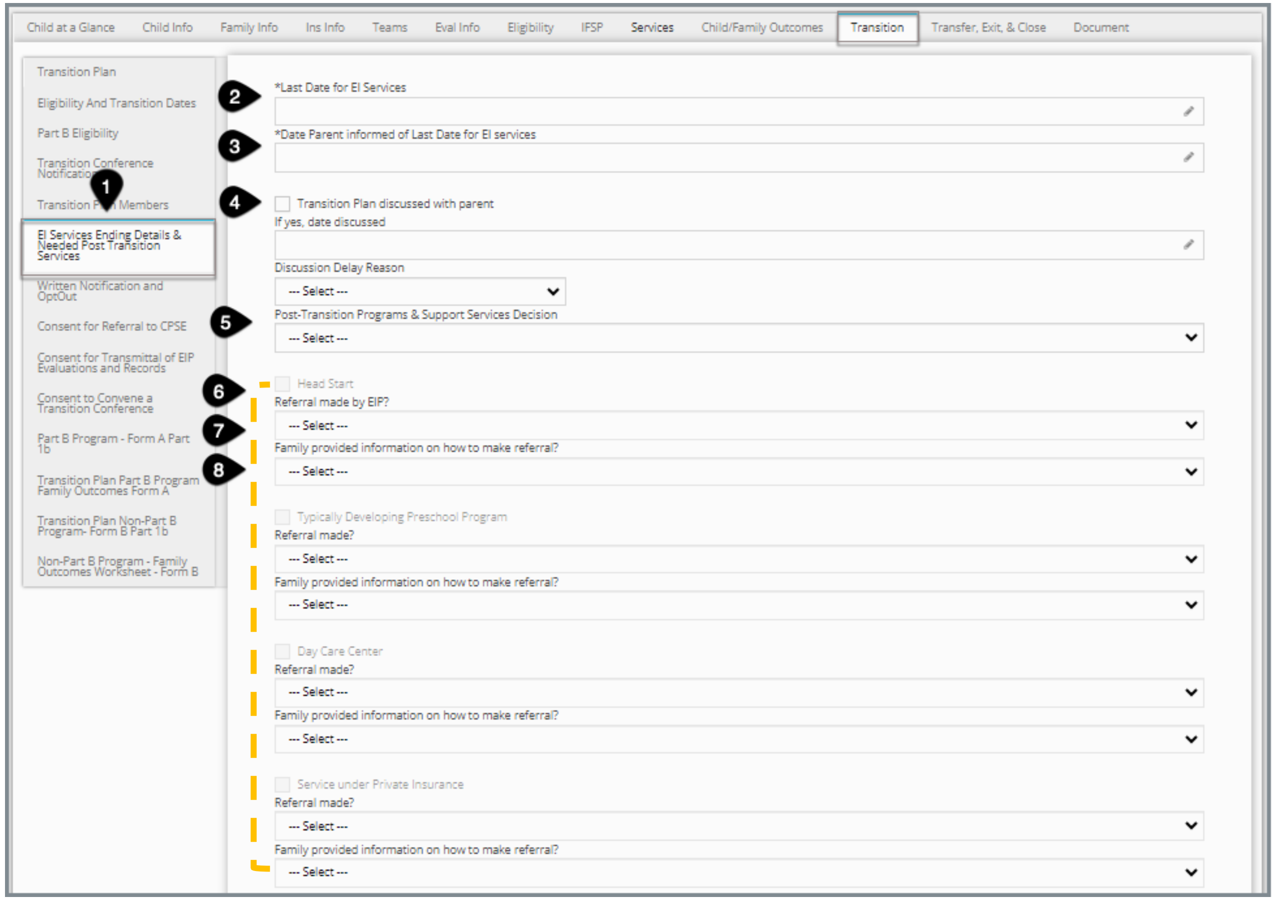
EI Services Ending Details & Post Transition Services

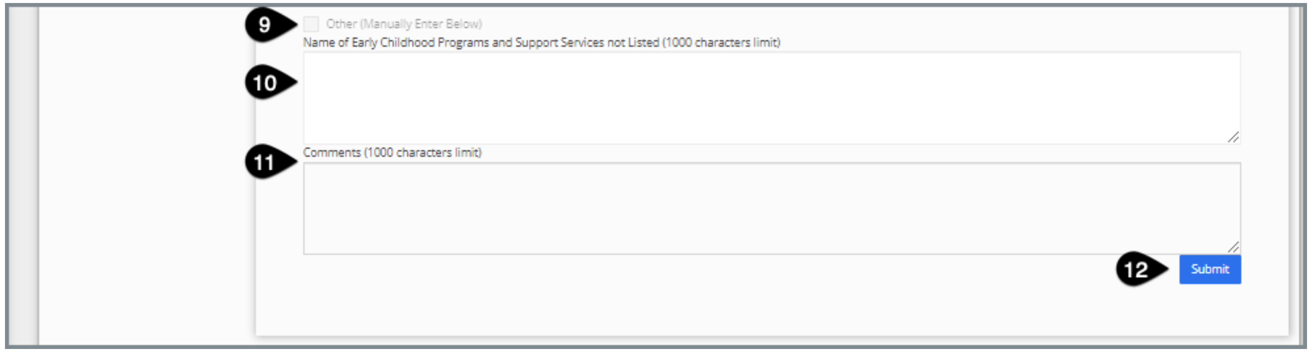
How To

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**.





Transition

Written Notification and Opt-Out

How To

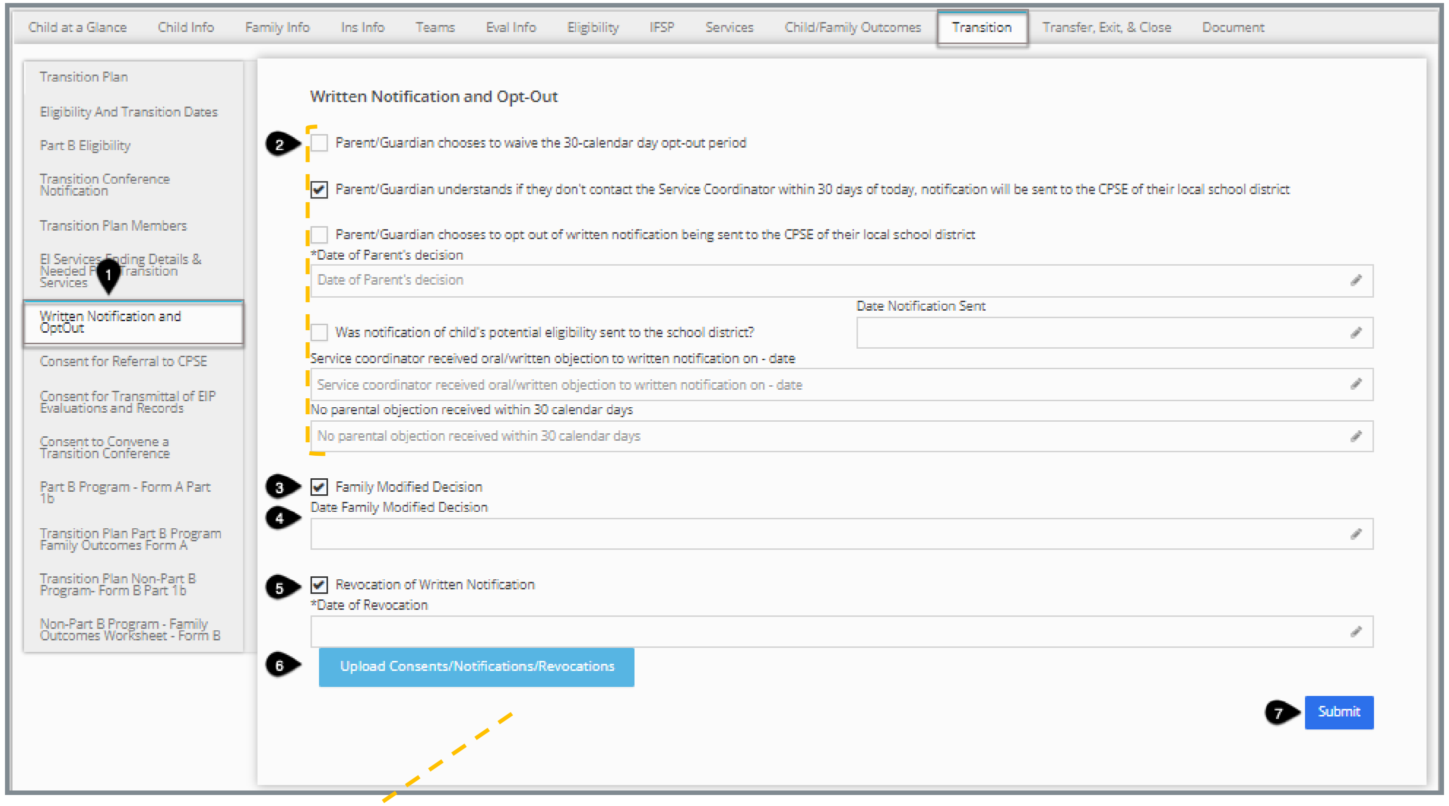
Complete a Written Notification and Opt-Out.

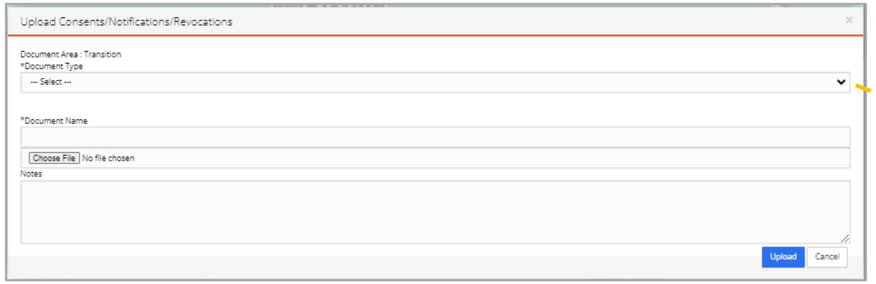
Note

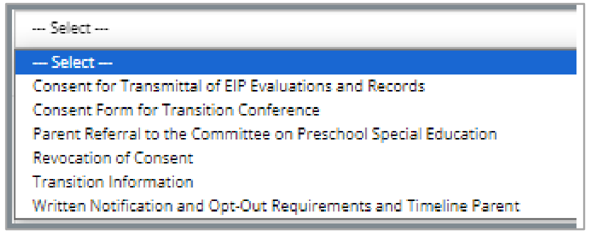
Selecting some checkboxes on this page may result in additional checkboxes, fields, and drop-downs.

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.







Transition

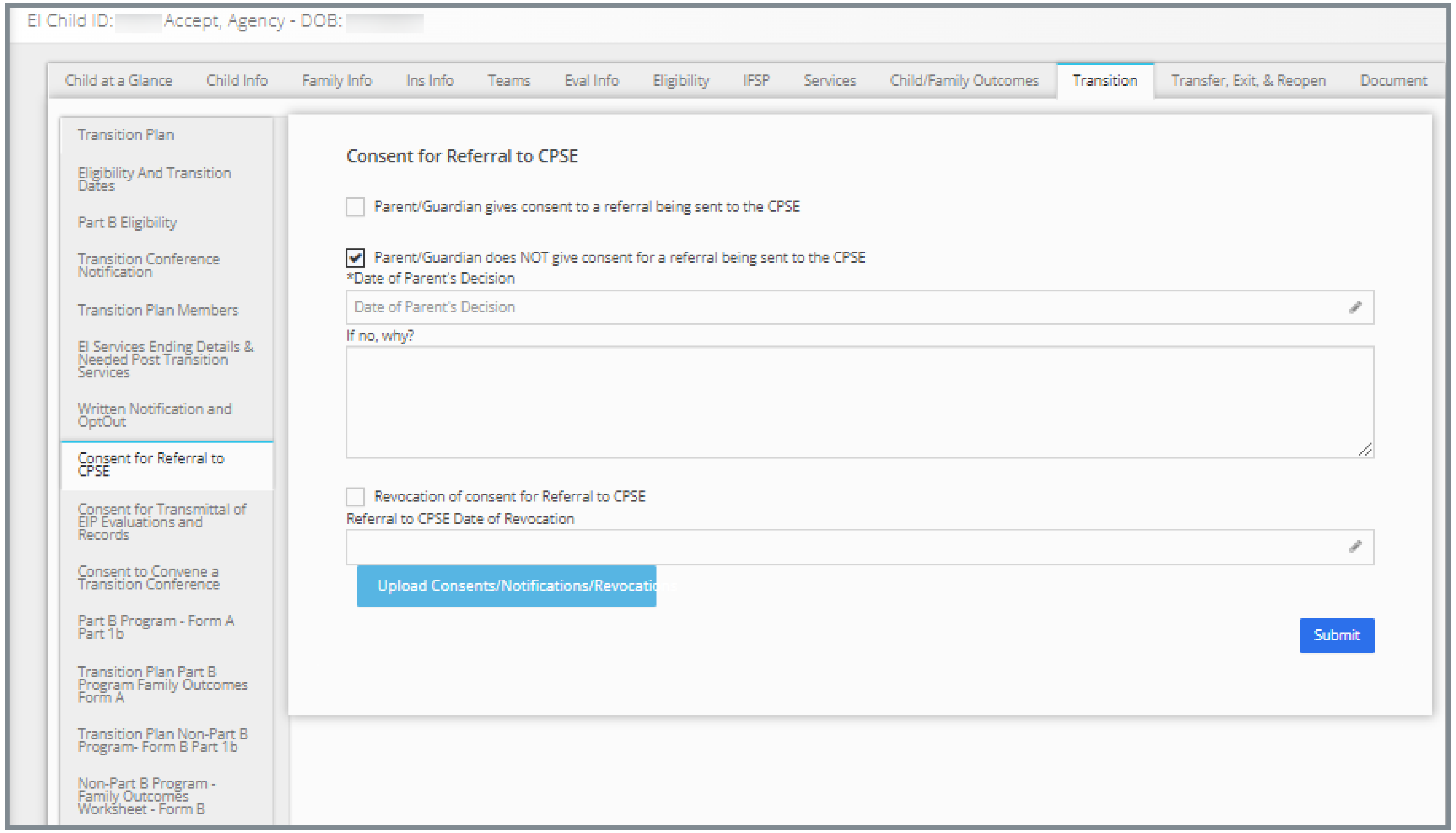
Consent for Referral to CPSE

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.



Transition

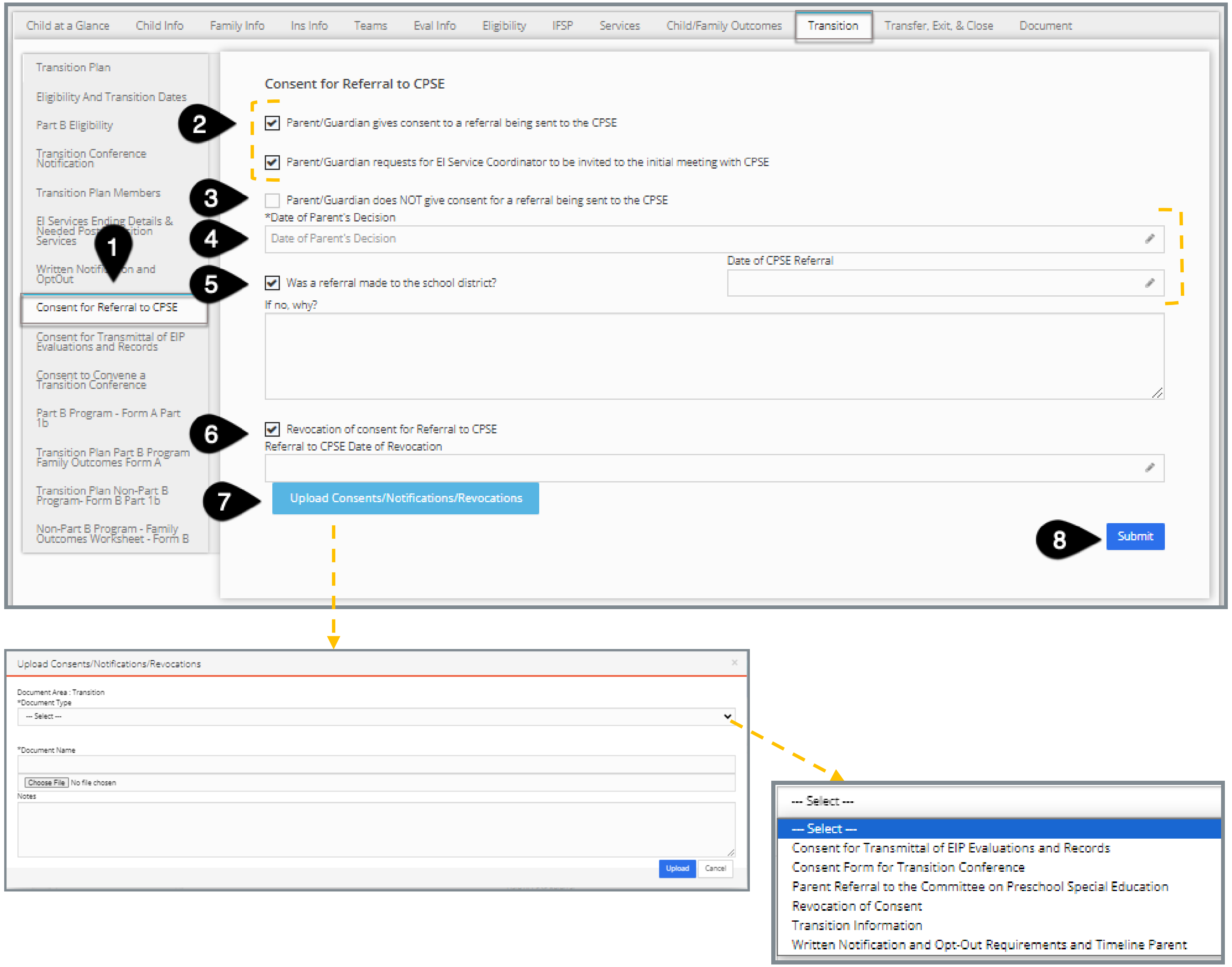
EI Services Ending Details & Post Transition Services

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

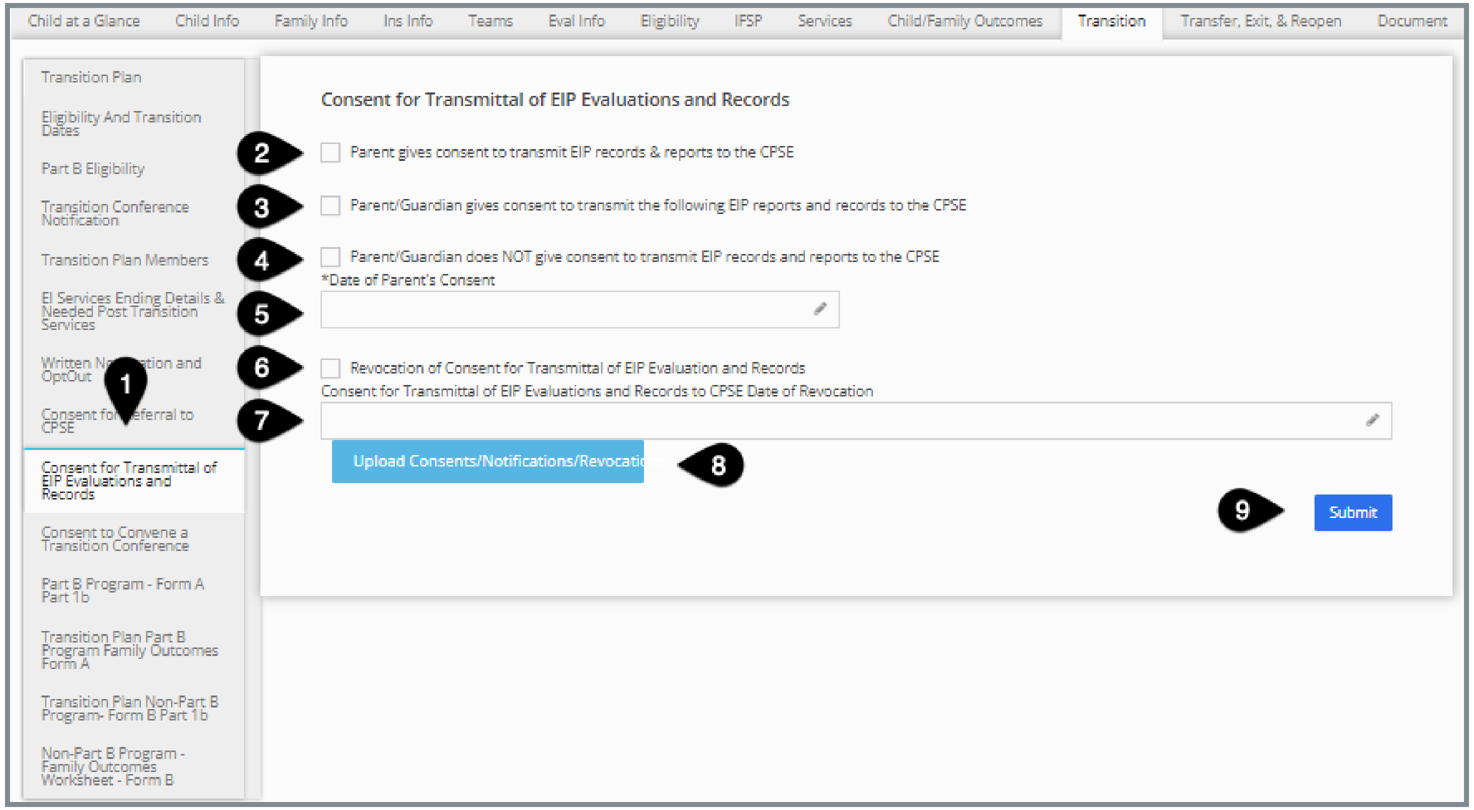
Consent for Transmittal of EIP Evaluations and Records

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.



Transition

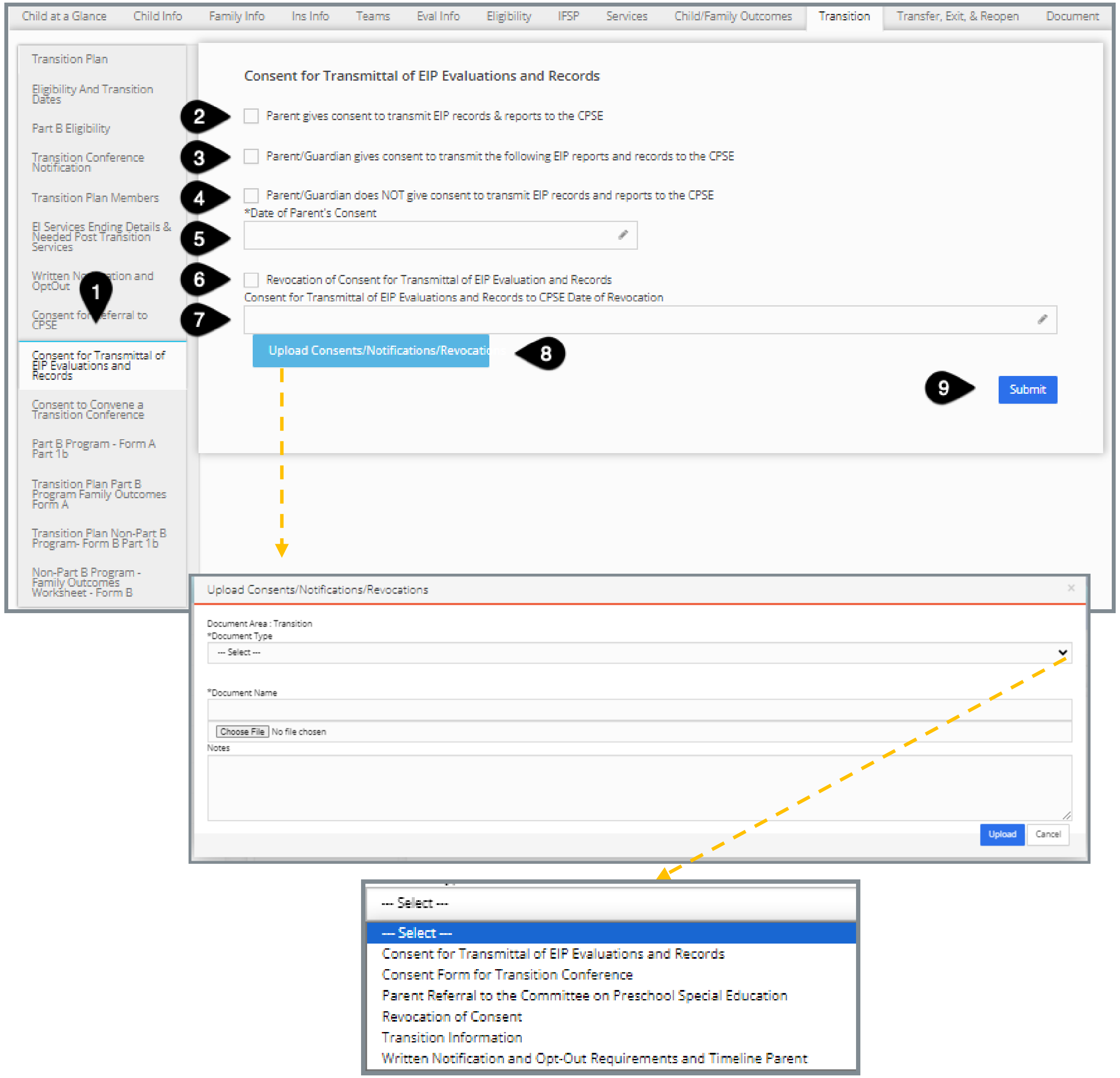
Consent for Transmittal of EIP Evaluations and Records

How To

Complete a Consent for Transmit 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.



Transition

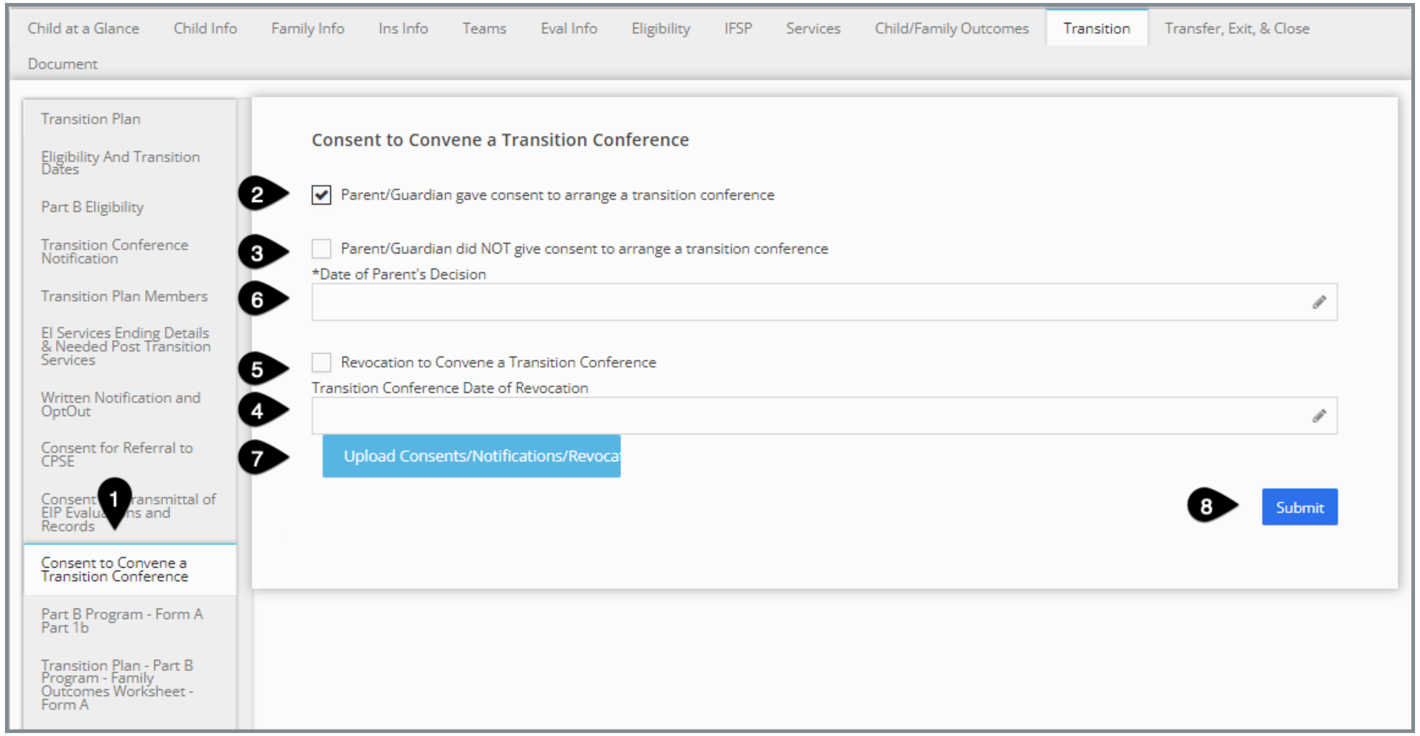
Consent to Convene a Transition Conference

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.



Transition

Consent to Convene a Transition Conference

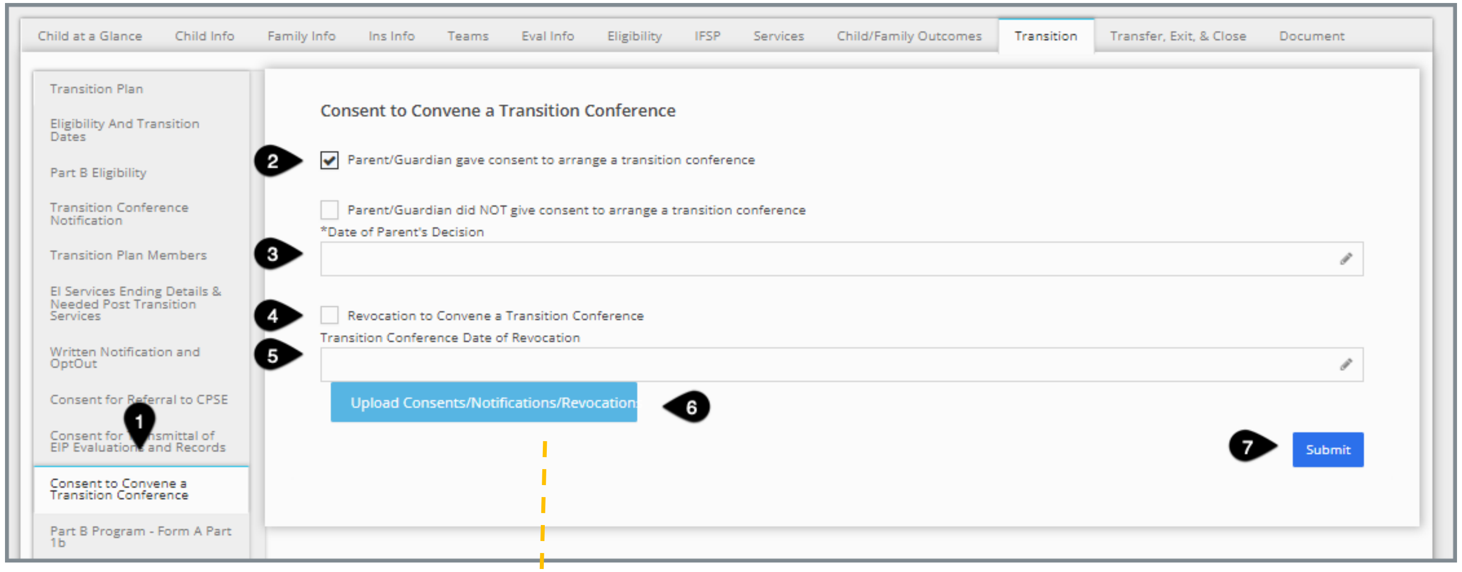
How To

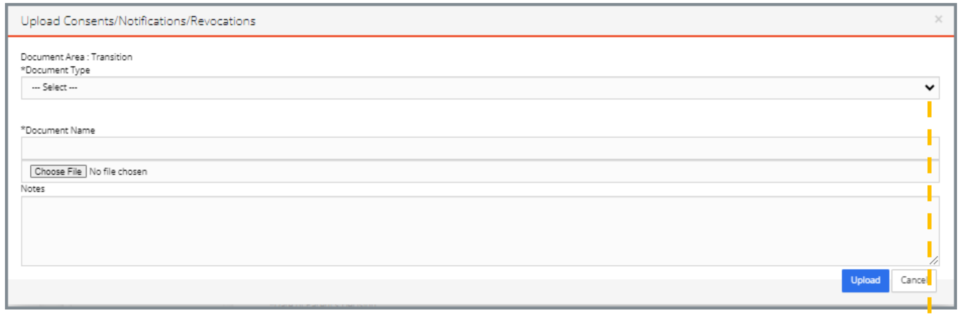
Complete a Consent to Convene a Transition Conference.

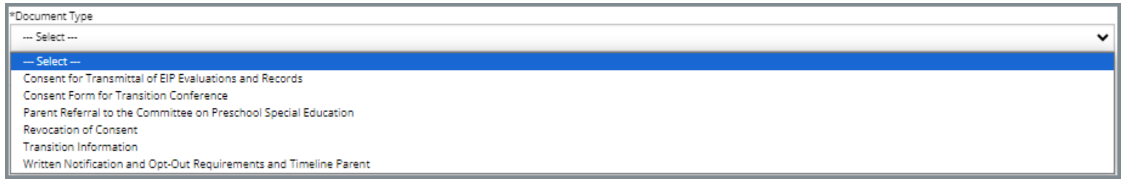
Option 1: Parent/Guardian gave consent to arrange a transition conference.

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

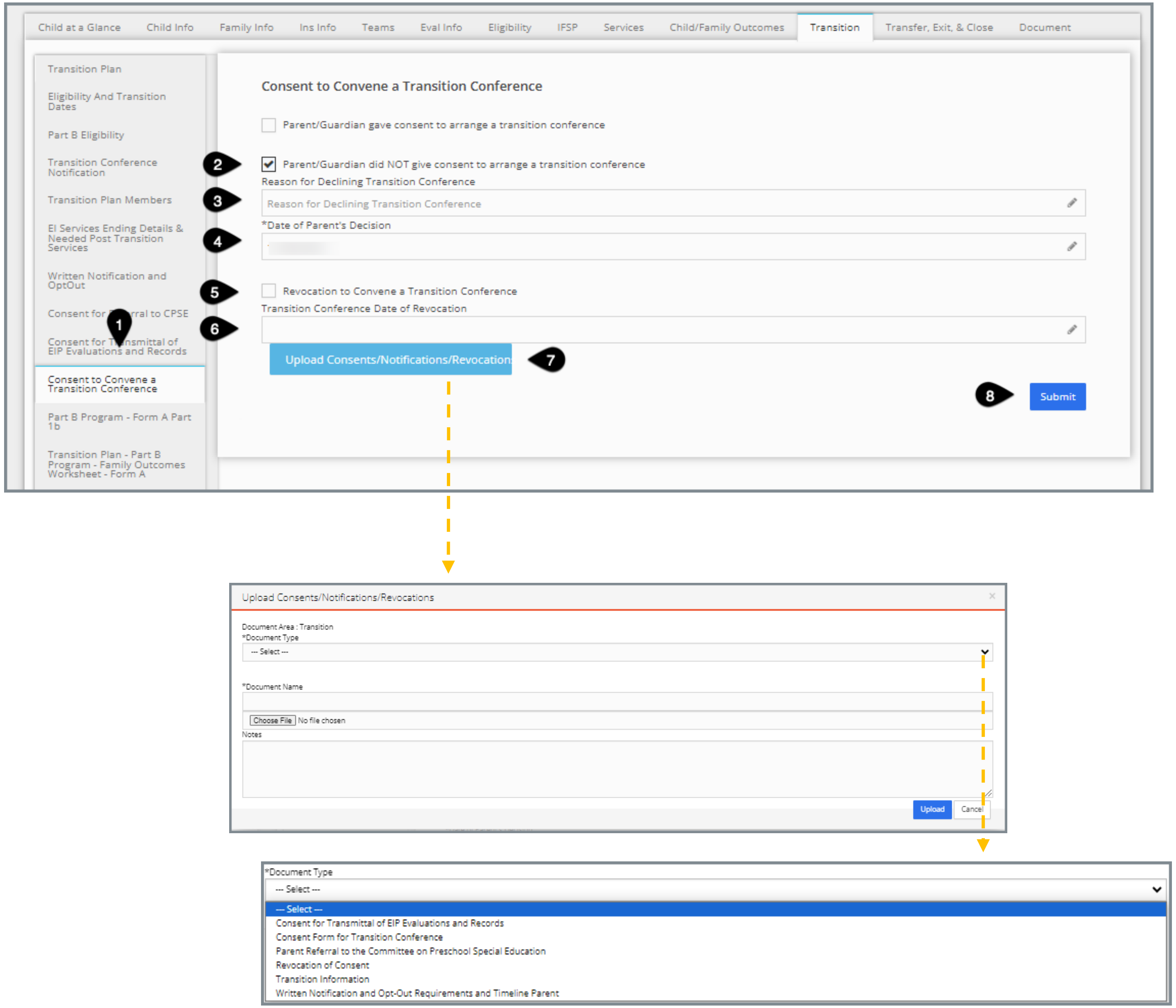
How To

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 <u>not</u> 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.

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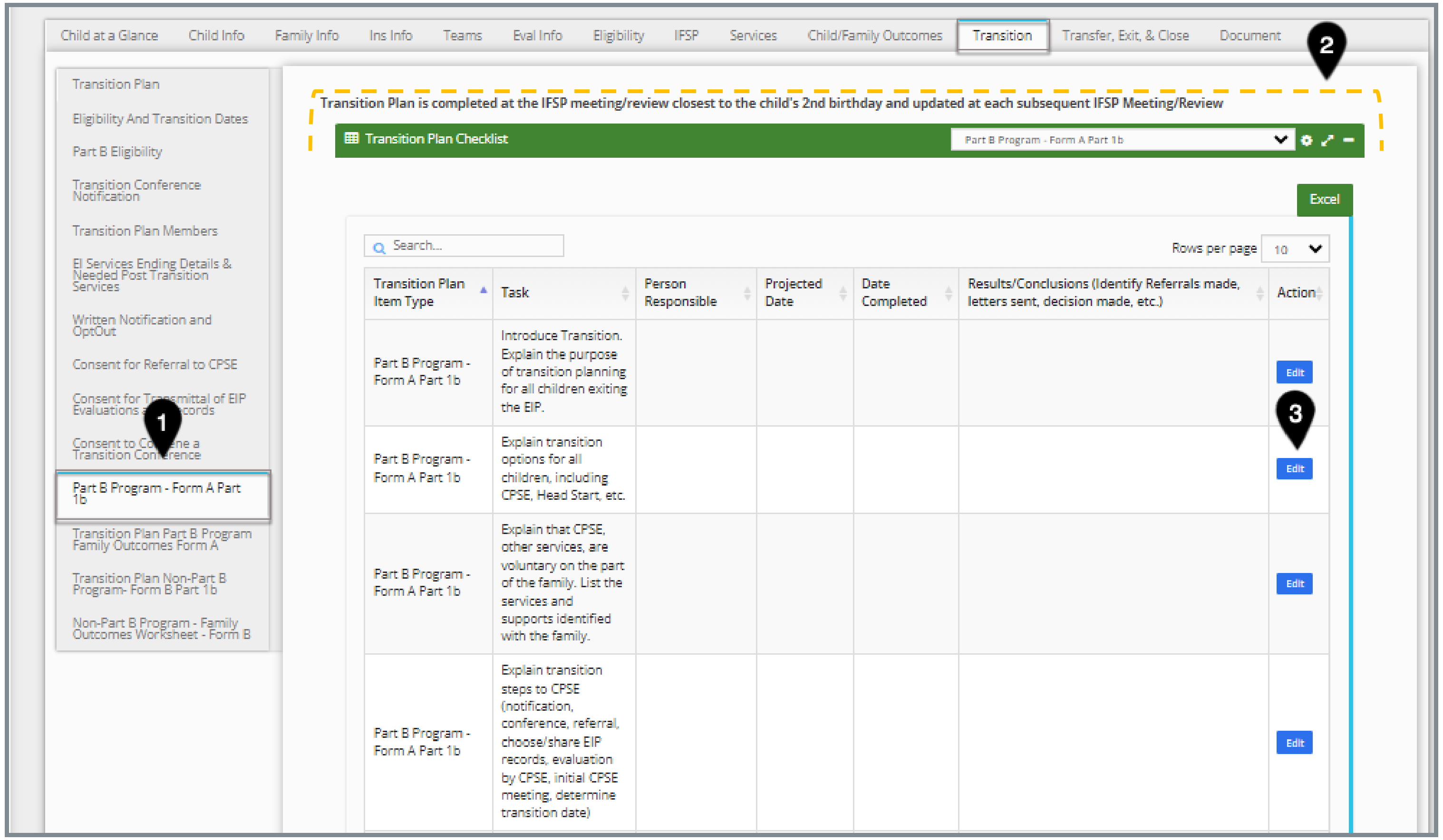


Transition

Part B Program – Form A Part 1b

How To

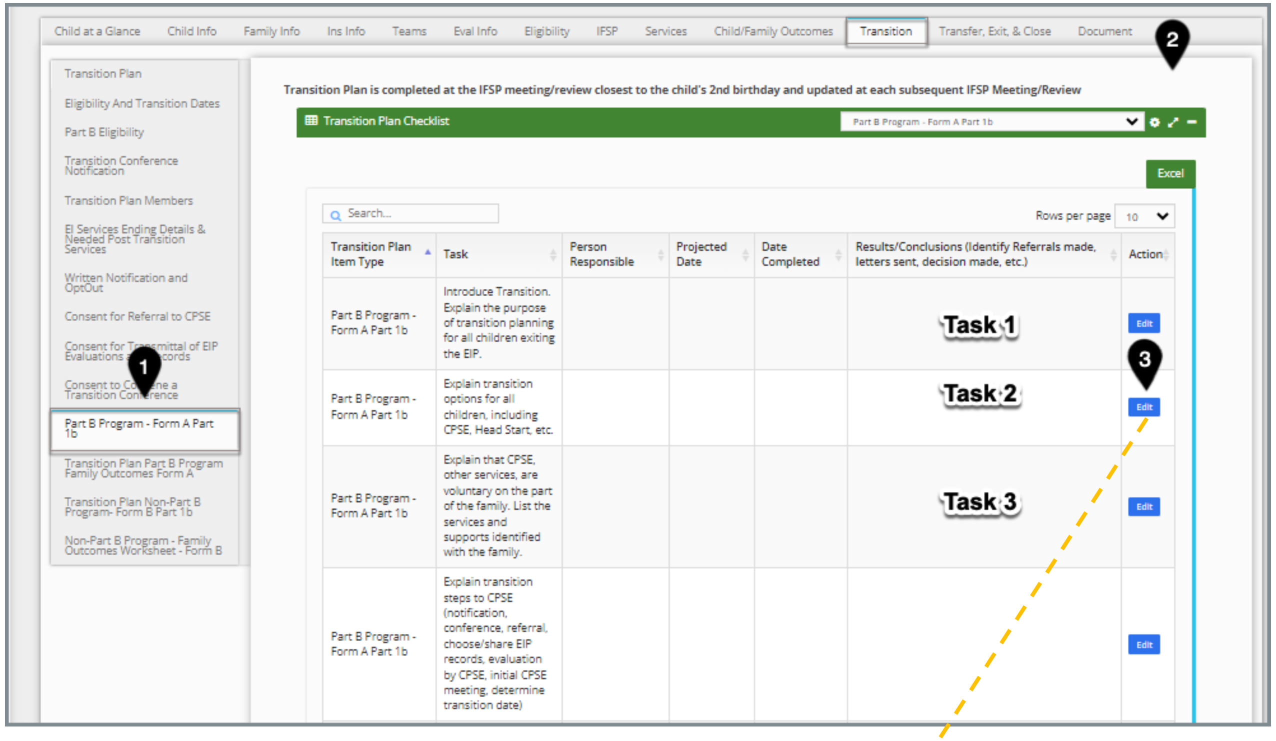
Complete the Transition Plan Checklist.

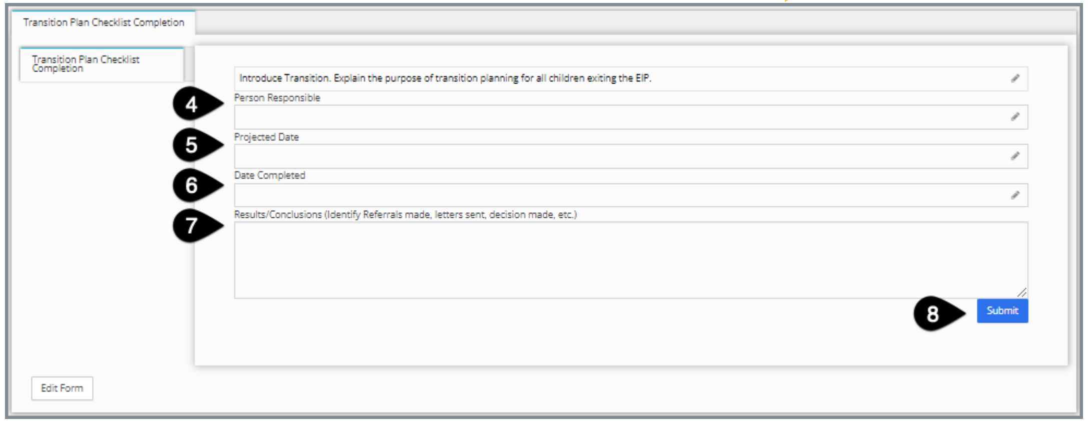
Note

- 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

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/Conclusion**.
8. Select **Submit**.





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.

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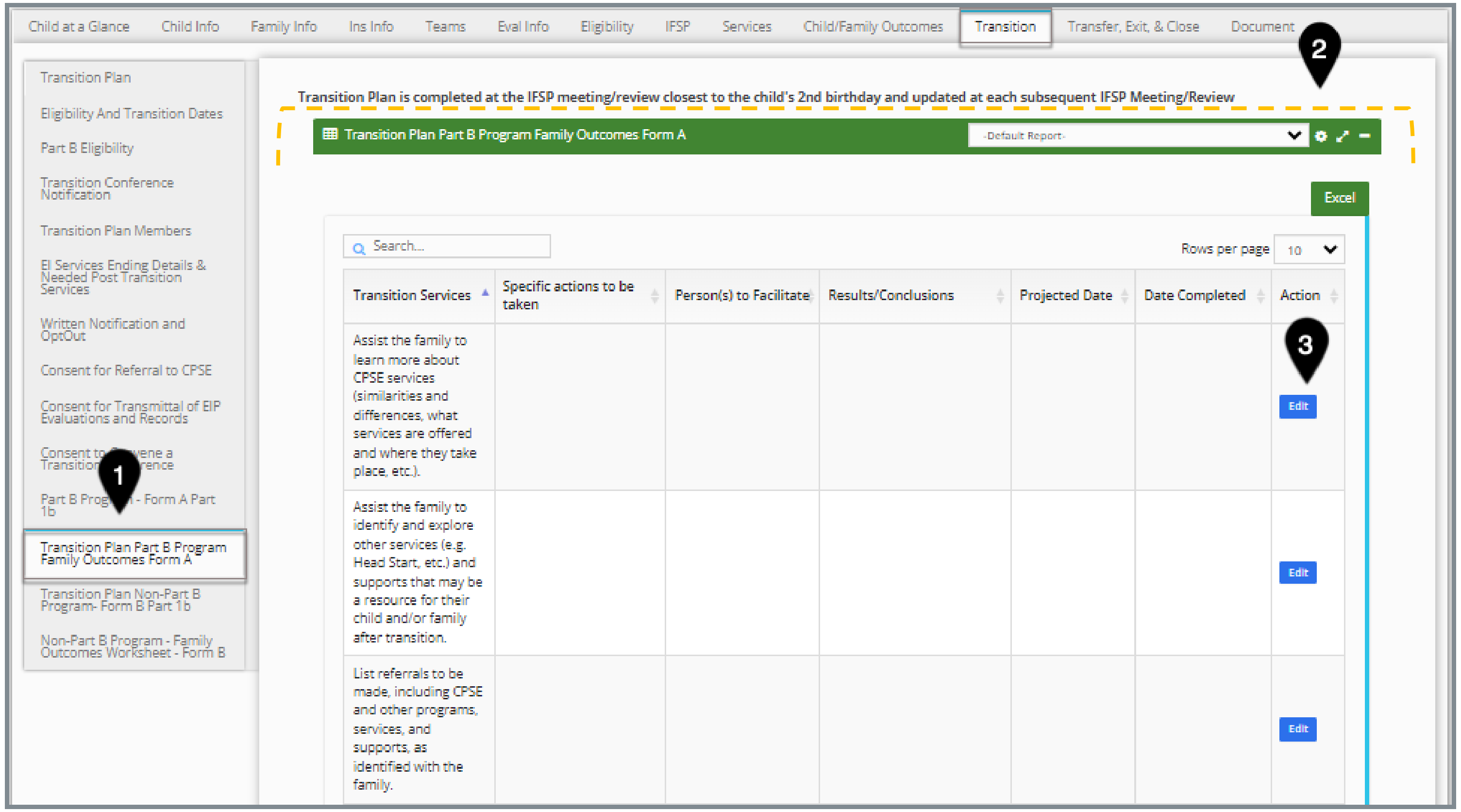


Transition

Transition Plan Part B Program Family Outcomes Form A

How To

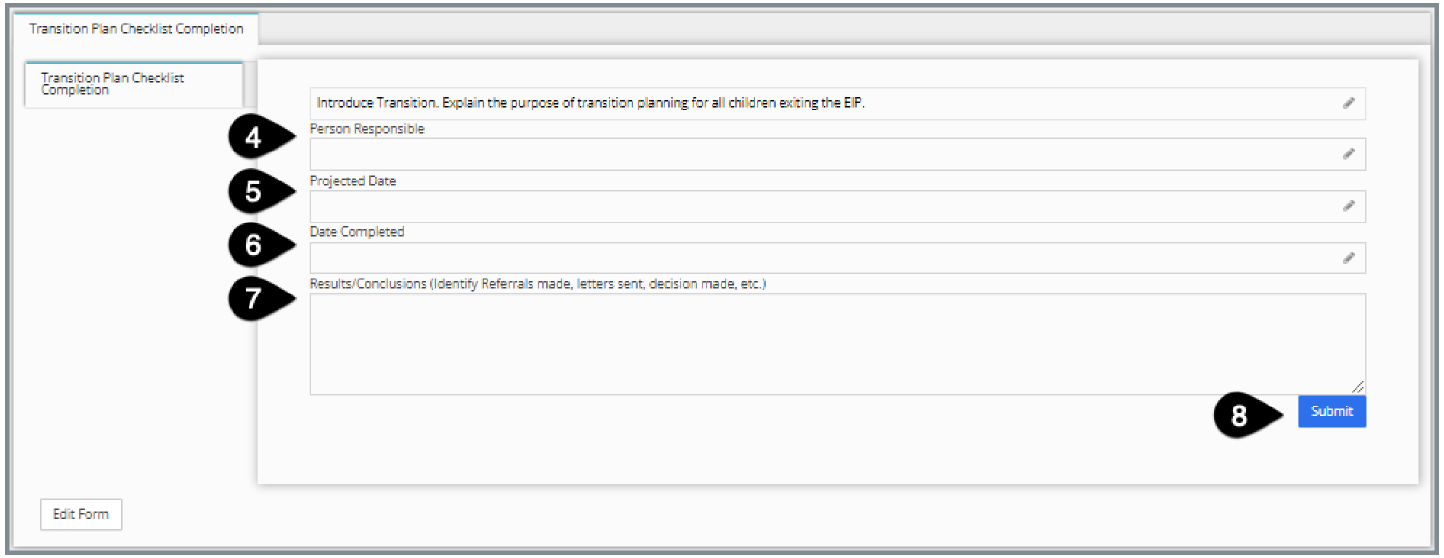
Complete the Transition Plan Checklist.

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**.



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.

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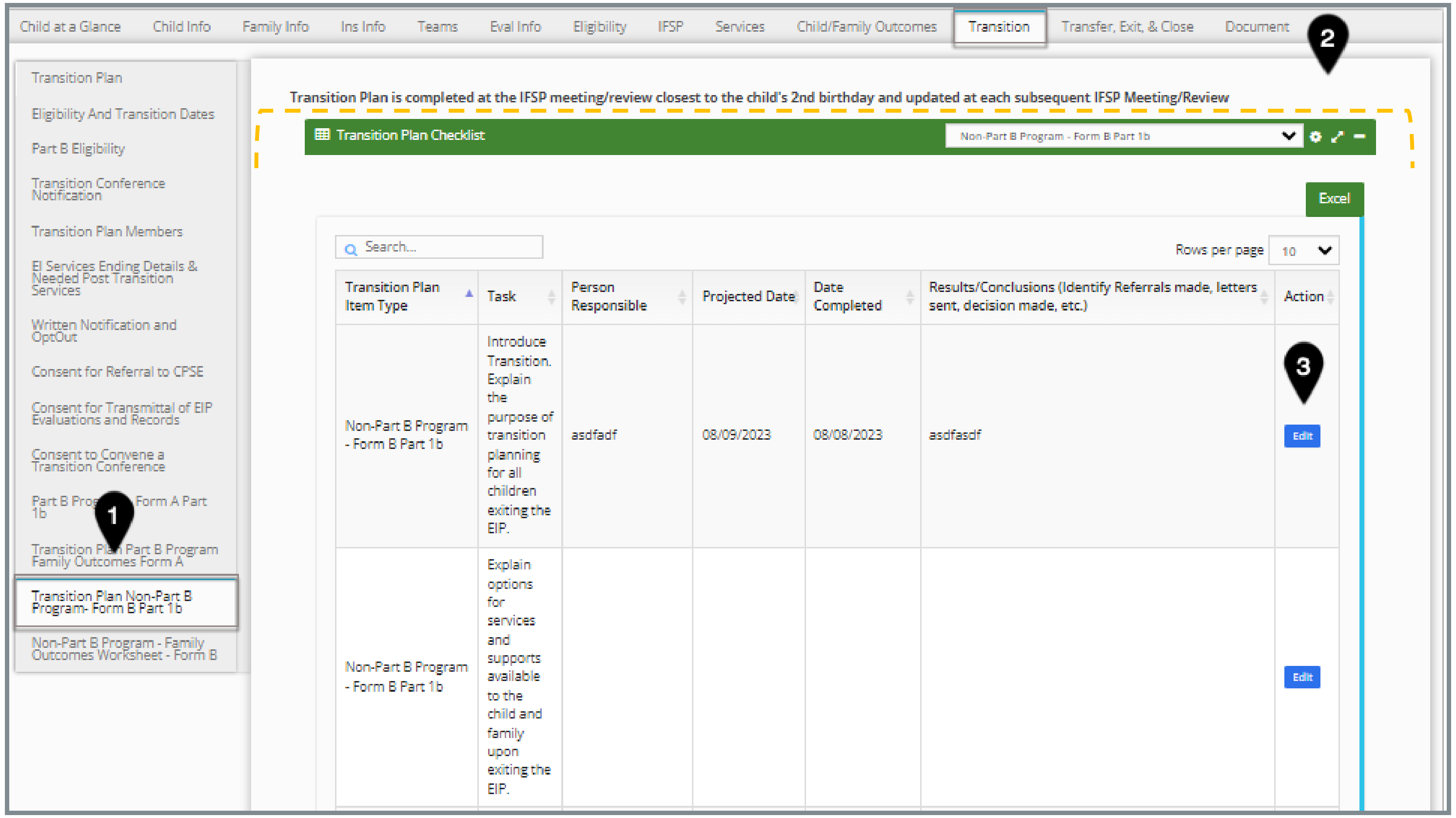


Transition

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

How To

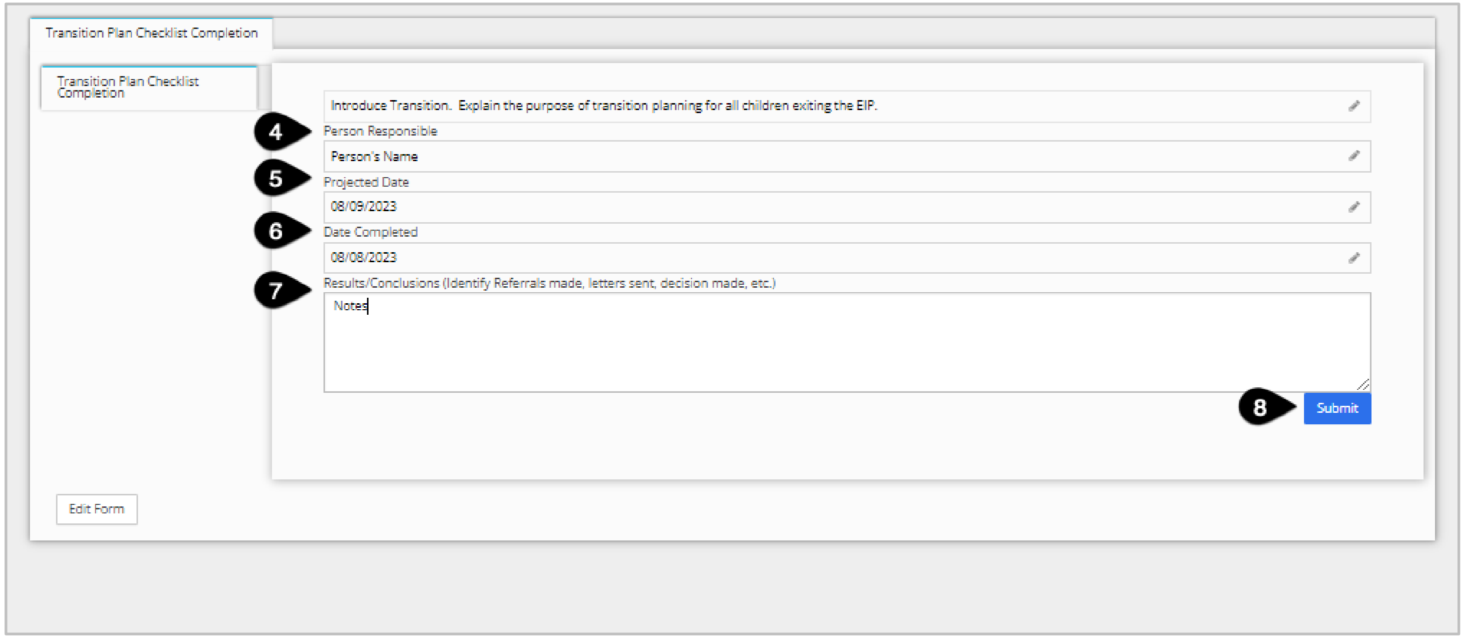
Complete the Transition Plan Checklist.

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**.



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.

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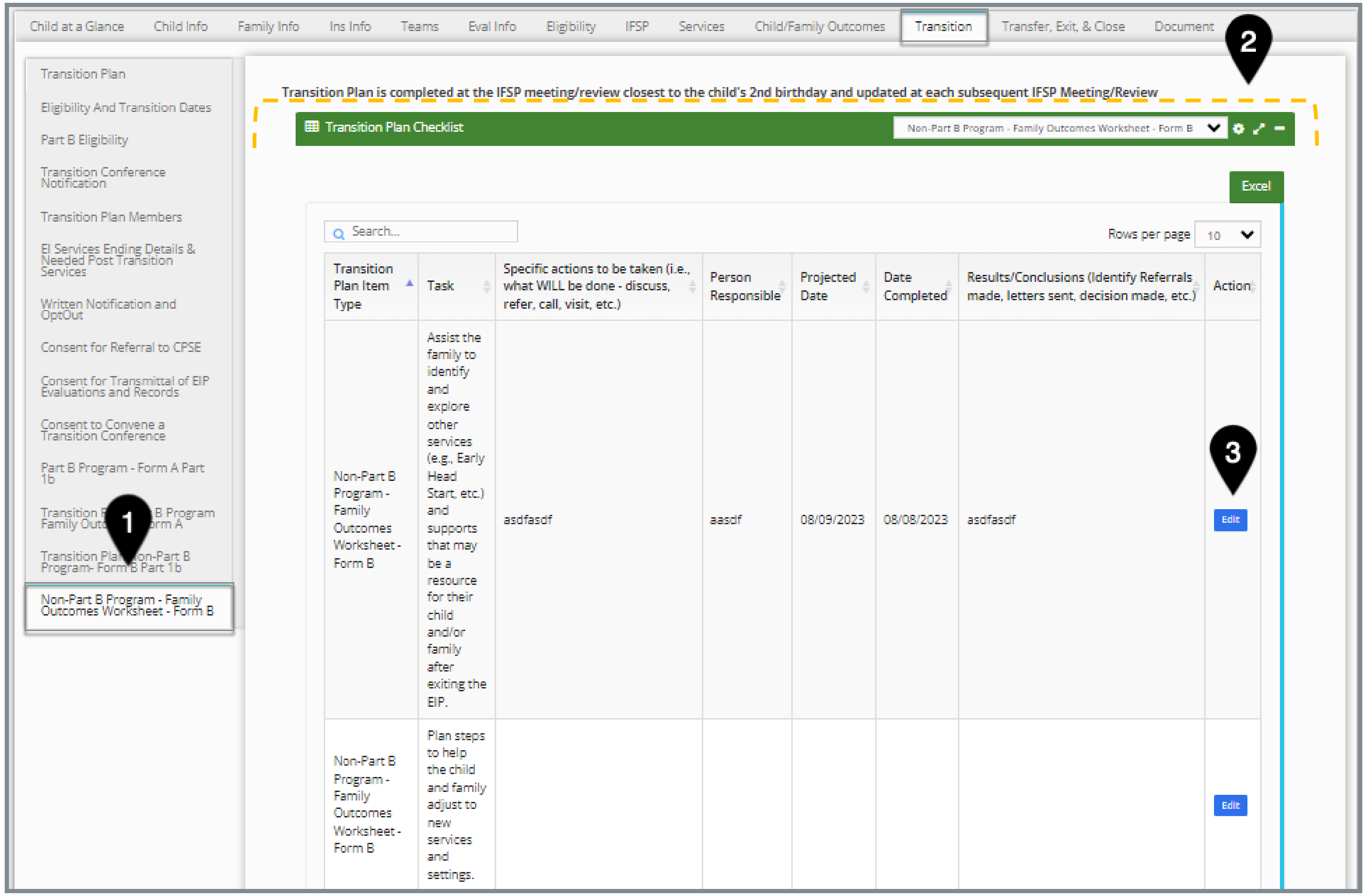


Transition
Non-Part B Program Family Outcomes Worksheet Form B

How To

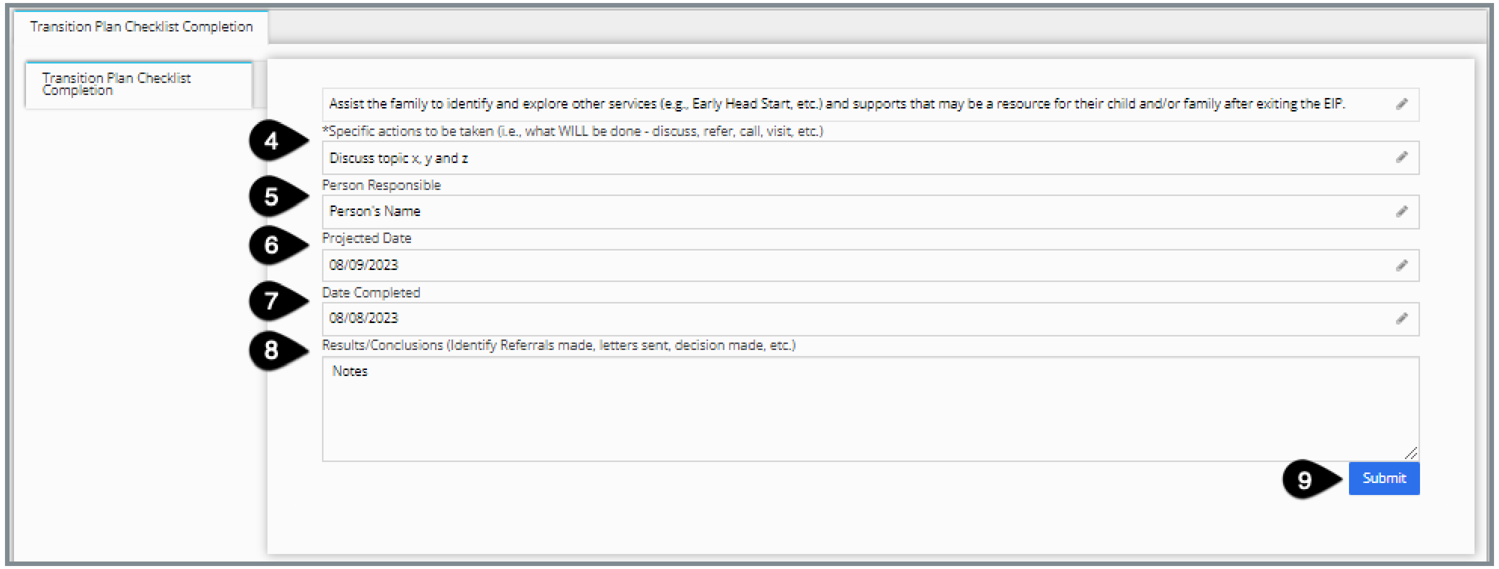
Complete the Transition Plan Checklist.

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

4. Enter the **Specific Actions to be taken**.
5. Enter the name of the **Person Responsible**.
6. Enter the **Projected Date**.
7. Enter the **Date Completed**, if applicable.
8. Enter a brief description of the **Results/Conclusions**.
9. Select **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