



Early Childhood Transition Voices from the Field

Best Practices to Streamline the Referral Process

Did You Know?

When Early Intervention Service (EIS) Providers and Local Education Agencies (LEAs) collaborate to establish clear procedures and define specific roles, children and families benefit from timely and effective transitions. Providing advance notice to the LEA about a child exiting IDEA Part C services - and who are potentially eligible for Part B services - ensures sufficient time to plan appropriately for the child's needs. This notification also serves as the child's initial referral to IDEA Part B services.

With written parental consent, EIS Providers can share important information, such as the child's most recent evaluation, assessments, and Individualized Family Service Plan (IFSP), before the Transition Conference (TC). Sharing this information helps to:

- Prevent duplicate evaluations.
- Support the eligibility determination process for Part B services.
- Inform the development of an Individualized Education Program (IEP).
- Ensure continuity of services during the transition.¹

¹ [2023 Early Childhood Transition Questions and Answers](#)





Spotlight on Best Practices from the Field

Riverside Early Intervention and **Criterion Middlesex Early Intervention** take a proactive approach to information sharing with districts, supporting caseload planning and anticipating potential referrals. Twice a year, in January and early September, both agencies provide districts with a spreadsheet of a list of potentially eligible children. This list supplements the individual notifications sent for each child who is potentially eligible for special education services, provided their family has not opted out in writing, in accordance with federal and state notification and referral timelines. To protect privacy, these spreadsheets include only minimal information, ensuring no personally identifiable information is shared. LEAs have found this process valuable for projecting enrollment numbers, planning programs, and allocating staff effectively.

Four early intervention agencies - **Criterion, Pernet, Mentor South Bay, and THOM Worcester** - collaborated as a cohort to align their processes for notification, referral, and transition conferences when referring potentially eligible children to Worcester Public Schools. During these meetings, the group shared their agency processes and identified inconsistencies in the type and format of information shared with the district. Recognizing the district's size and needs, the agencies collaborated with district personnel to determine the most helpful way to share referral information in advance of the transition conference and how to best organize it, knowing referral packets are coming from multiple agencies. **Brockton Public Schools** is collaborating with their early intervention agencies to implement a shared tracking spreadsheet for managing referrals and scheduling transition conferences. The spreadsheet records key details, including when referrals were sent to the district and the date, time, and location of the transition conference. By streamlining this process, the tool helps the district effectively plan and coordinate transition conferences, ensuring a smoother experience for everyone involved.

"It was really helpful for all of the agencies to get on the same page and always come to agreement on what could be sent or implemented. It was tedious but so fantastic to go through the process - piece by piece together first and then with the district. The district personnel were instrumental in the conversation to understand what the district needed."
– EI Director

Key Practices and Tips from the Field:

- EIS Providers and LEAs communicate regularly and identify points of contact for sending and receiving notification/referral.
- Develop a shared tracker for EIS and LEAs to document sending and receiving notification/referral. Review the tracker regularly and reach out to the point of contact with questions ahead of time.
- Develop a shared chart for returning school consent forms based on the month of the child's birthday.

Tools and Resources:

- [Transition from Part C to Preschool](#)
- [2023 Early Childhood Transition Questions and Answers](#)
- [Early Intervention to LEA Tracking Sheet - TEMPLATE](#)
- [MA DPH Early Intervention Operational Standards](#)

