

Transition Planning Toolkit

Introduction:

Under the federal Individuals with Disabilities Education Act (IDEA) and the Massachusetts Special Education Regulations, potentially eligible children referred from Part C Early Intervention (EI) and found eligible for Part B preschool programs are entitled to begin receiving Part B services pursuant to an Individualized Education Program (IEP) by their third birthday. This Transition Planning Toolkit is designed to be used by EI programs and school districts to assist in planning to facilitate a smooth transition from Part C EI to Part B preschool programs.

This toolkit includes the following tools:

- A) [Child Summary](#)
- B) [Transition Planning Process & Key Steps](#)
- C) [Early Intervention to LEA Transition Tracker](#)
- D) [Recommended Transition Timelines](#)
- E) [Transition Conference Agenda](#)
- F) [Review Part C Documentation and Data](#)
- G) [Determine Eligibility and Services for Part B, Section 619](#)

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A) Child Summary:

The Child Summary is designed to be a joint planning tool used by EI programs and school districts to assist in planning a child's transition to ECSE.

The EI provider should take the lead role in completing the following section(s):

- Child, Family, and Provider Information
- Transition Notification/Referral Information
- Transition Conference

The school district should take the lead role in completing the following section(s):

- Evaluation and Eligibility Information

This could be shared via email between the provider and district or could be saved in a shared folder so that both parties can complete the information as they progress through the transition process.

Child, Family, and Provider Information:

Child's Name:	Date of Birth:	Date of 3rd Birthday:
Parent/Guardian(s) Name:		

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Home Address:		
Phone:	Email:	Other Contact:
EI Service Coordinator (SC):	Service Coordinator Contact Information (email, phone):	
District of Residency Name:	District Contact(s) (name, role, email, phone):	

Transition Notification/Referral Information:

Date notification sent to LEA and received from EI (recommended at age 30 months):	Date LEA sent procedural safeguards to the family:
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Date of additional information sent to the LEA (requires parental consent):

- Most recent evaluations:
- Assessments:
- IFSP:
- Other documents:

Transition Conference:

Potential dates for conference:

Option 1:

Option 2:

Option 3:

Scheduled date, time, & location for conference:

Date invitation sent for conference (list date and method):

Conference format and attendees present (note how each participated, in person, virtual, phone, etc.):

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Evaluation and Eligibility for Part B Services Information:

Date <i>Evaluation Consent Form</i> provided to the family:	Signed <i>Evaluation Consent Form</i> received (recommended at least 60 calendar days prior to the 3rd birthday) ¹ :
If a signed <i>Evaluation Consent Form</i> was not received, note attempts to contact the family (date, method, personnel):	
Date evaluation completed (recommended no later than 34 months of age):	Eligibility determination (recommended no later than 35 months of age): Eligible Ineligible
IEP meeting date (recommended no later than 35 months of age):	Date IEP signed:

¹ See [Technical Assistance Advisory SPED 2019 - 1](#)

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IEP services implementation start (no later than the child's third birthday)²:

If timeline delay occurred, for any step(s), note the step and cause for the delay:

² See [603 CMR 28.06\(7\)\(b\)](#)

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B) Transition Planning Process & Key Steps:

Use the section below to outline and document each step in the transition planning process including the due date, date of completion, and personnel responsible.

	Transition Activity	Lead Agency	Name of Agency/District Personnel Responsible	Projected Date	Date Completed	Results/ Conclusions (Note referrals made, letters sent, attendance, delays, etc.)
1	With the parent, develop a transition plan in the child's IFSP and explain the purpose of transition planning and transition steps. Provide Part C Family Rights Notice	Early Intervention				
2	Inform parents of opt-out policy, and deadline (___/___/___)	Early Intervention				
2a	If parents provide written notification of their choice to opt-out, document the opt out date in the child's record	Early Intervention				
3	If the parent does not opt-out within 30 days, send notification of potential eligibility to the LEA contact including minimally personally identifiable information (child's name, date of birth, parent's names, address, and telephone number)	Early Intervention				
4	Respond to notification of potential eligibility	School District				

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	Transition Activity	Lead Agency	Name of Agency/District Personnel Responsible	Projected Date	Date Completed	Results/ Conclusions (Note referrals made, letters sent, attendance, delays, etc.)
4a	Send procedural safeguards to family	School District				
5	With parent approval, schedule the transition conference. - Provide an invitation to the TC to the family and LEA. - Provide Prior Written Notice of the TC to the family.	Early Intervention				
7	With parental consent, send additional information (IFSP, most recent evaluation and assessments, diagnosis and EI services) to the LEA.	Early Intervention				
8	Begin obtaining necessary documentation for registration and enrollment including proof of residency	School District				
9	Confirm attendance at the scheduled TC	School District				
10	Convene transition conference Use agenda to document participants, topics, and questions	Early Intervention				

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Transition Activity		Lead Agency	Name of Agency/District Personnel Responsible	Projected Date	Date Completed	Results/ Conclusions (Note referrals made, letters sent, attendance, delays, etc.)
	- Inform family of Part B requirements, FAPE, continuum of services, and least restrictive environment - Discuss any necessary documents needed for registration if found eligible. - LEA provides Notice of Procedural Safeguards if not completed. *A district representative must be in attendance in person or other mode of participation					
11	Send the <i>Evaluation Consent Form</i> to the parent	School District				
12	Obtain the signed Evaluation Consent Form	School District				
13	Review referral information and child's records and determine necessary evaluations for eligibility for special education	School District				
14	Conduct evaluations to determine eligibility for special education	School District				
15	Schedule/arrange the eligibility determination/IEP meeting	School District				

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	Transition Activity	Lead Agency	Name of Agency/District Personnel Responsible	Projected Date	Date Completed	Results/ Conclusions (Note referrals made, letters sent, attendance, delays, etc.)
16	Send Prior Written Notice of IEP meeting to the parent	School District				
17	Invite IEP team members including EI service provider, if appropriate	School District				
18	Convene eligibility determination/IEP meeting	School District				
19	If a child is found ineligible, provide the parent with appropriate resources	School District				
20	If the child is found eligible, obtain parent signatures for special education services	School District				
21	Ensure proof of residency and registration paperwork is completed	School District				
22	The child begins receiving special education services at age three.	School District				

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C) Early Intervention to LEA Transition Tracker

Using a shared database or tracker can help facilitate a smooth transfer of information and critical dates between sending and receiving parties. This template can be used to track child information, notification dates & referral dates, and scheduling of transition events.

[Early Intervention to LEA Tracker](#)

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D) Recommended Transition Timelines:

When you begin planning for a transition from Part C to Part B special education services, it is important to backward plan to ensure timelines can be met by both the agency and the district. This can also help ensure that the family is informed and knows when to expect each transition step to occur.

It is recommended that districts develop strategies to work with EI program staff to address the needs of children referred for special education evaluation at the end of the school year when the school program is not in session, and in other special circumstances, to minimize delays in evaluation and implementation of services beyond the child's third birthday.

For children with birthdays between mid-June and the end of September, make referrals by February so that the eligibility determination meeting can occur before the end of the school year.

Month of Birthday	Date Range	Referral by EI to LEA	Transition Conference	Signed Consent to Evaluate	Dates to be completed based on signed consent to evaluate		
					Date for Evaluation Completed (30 school working days from written consent, recommended no later than 34 months of age)	Date for IEP (45 school working days from written consent; recommended no later than 35 months of age)	Date for IEP Services Start (on or before the child's 3rd birthday)
Jan	1 - 15	July 1-15	Sept. 1-15	Sept. 16-30			
Jan	16 - 31	July 16-31	Sept. 16-30	Oct. 1-15			
Feb	1 - 15	Aug. 1-16	Oct. 1-15	Oct. 16-31			
Feb	16 - 28	Aug. 16-31	Oct. 16-31	Nov. 1-15			
Mar	1 - 15	Sept. 1-15	Nov. 1-15	Nov. 16-30			

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Dates to be completed
based on signed consent to evaluate

Month of Birthday	Date Range	Referral by EI to LEA	Transition Conference	Signed Consent to Evaluate	Date for Evaluation Completed (30 school working days from written consent, recommended no later than 34 months of age)	Date for IEP (45 school working days from written consent; recommended no later than 35 months of age)	Date for IEP Services Start (on or before the child's 3rd birthday)
Mar	16 - 31	Sept. 16-30	Nov. 16-30	Dec. 1-15			
Apr	1 - 15	Oct. 1-15	Dec. 1-15	Dec. 16-31			
Apr	16 - 30	Oct. 16-31	Dec. 16-31	Jan. 1-15			
May	1 - 15	Nov. 1-15	Jan. 1-15	Jan. 16-31			
May	16 - 31	Nov. 16-30	Jan. 16-31	Feb. 1-15			
Jun	1 - 15	Dec. 1-15	Feb. 1-15	Feb. 16-28			
Jun	16 - 30	Dec. 1-15	Feb. 16-28	Mar. 1-15			
Jul	1 - 15	Dec. 1-15	Feb. - Mar.	Mar. - Apr.			
Jul	16 - 31	Dec. 1-15	Feb. - Mar.	Mar. - Apr.			
Aug	1 - 15	Dec. 1-15	Feb. - Mar.	Mar. - Apr.			
Aug	16 - 31	Dec. 1-15	Feb. - Mar.	Mar. - Apr.			
Sep	1 - 15	Dec. 1-15	Feb. - Mar.	Mar. - Apr.			

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Sep	16 - 30	Jan. 15-Feb. 1	Mar. 16-31	Apr. 1-15			
Oct	1 - 15	Feb. 1-15	Apr. 1-15	Apr. 16-30			
Oct	16 - 31	Feb. 16-28	Apr. 16-30	May 1-15			
Nov	1 - 15	Mar. 1-15	May 1-15	May 16-31			
Nov	16 - 30	Mar. 16-31	May 16-31	May 16 - Jun 15			
Dec	1 - 15	June 1-15	Early Sept.	Sept. 16-30			
Dec	16 - 31	June 16-30	Early Sept.	Sept. 16-30			

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E) Transition Conference Agenda:

Child Name/DOB	
Location	
Parent/Family Name Attended	
Parent/Family Contact Information	
Student Strengths/ Concerns Reported by Family	
Meeting Topics	The EI provider and district representative will: • Discuss possible options for support and services once the child exits Part C. • Establish or review transition activities as part of the Transition Plan. • Review preschool programs and special education services. • Establish or review transition activities as part of the Transition Plan. • Discuss evaluation process and next steps.

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Q&A	
Future Meetings	DATE @ TIME: Location: Contact: [Enter name and email] for more information or rescheduling

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F) Review Part C Documentation and Data

Source of Information	Date	
Existing Reports		
Medical Information		
Diagnosed Condition(s)		
Other		
Notes		

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Individualized Family Service Plan (IFSP)		
Documentation of Provision of IFSP Services Provided		
Physical Development		
Cognitive Development		
Communication Development		
Social - Emotional Development		
Adaptive Development		
Notes		

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Observations and Other Information
Notes

G) Determine Eligibility and Services for Part B, Section 619

Area of Information	Date	Source/Tool
Existing Reports		
Health (Diagnosed conditions)		
Notes		
Vision		
Notes		

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Hearing		
Notes		
Social Emotional Development		
Notes		
Cognitive		
Notes		

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Academic Readiness		
Notes		
Communication		
Notes		
Motor Abilities		
Notes		

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Observations		
Notes		
Additional Requirements		
Notes		

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