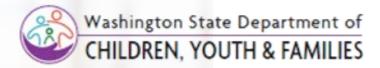# Completing the Transition Activities

This guide covers how to document informal transition planning within the IFSP tab and formal transition activities within ACORN *Powered* by EI Hub Transition Tab.

Disclaimer: This training aims to enhance the knowledge, skills, and proficiency in using ACORN as it relates to Early Support Services and should not substitute required programmatic training. The information presented in this content reflects the system build at the time of training.

Washington State Department of
CHILDREN, YOUTH & FAMILIES
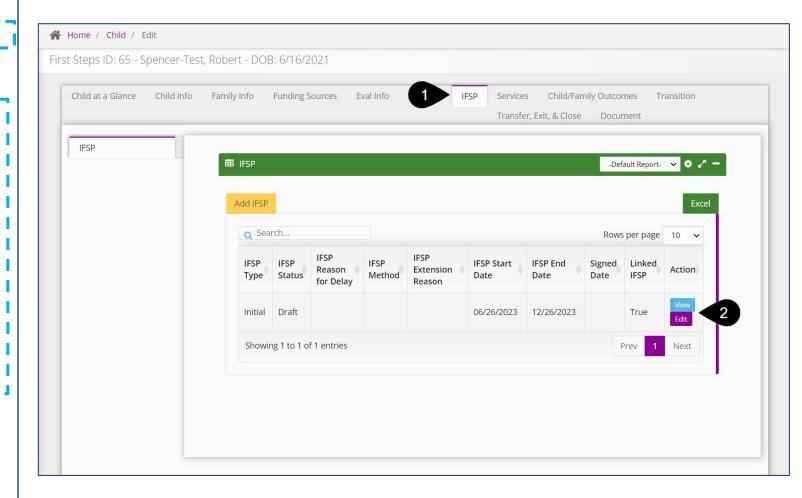
Transition
Transition Discussion

🔍 How To

Add Transition Discussion Details to an Existing IFSP

ℹ️ Notes

- Please note, there are two main areas of EI-Hub that 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. You search for the child by selecting the child and lookup option. In the Child Lookup Results Report Filter, enter information in the fields to locate the child.

- The **IFSP Transition** panel is a less formal transition panel that captures parental discussions, that may occur during IFSP meetings, regarding the child's future transition options.

- The **Transition** tab is where the formal transition process begins This tab records and houses resources to aid in the Transition process. Some information and tools stored in this tab includes the child's Part B eligibility, transition conference dates, participants, notification templates, transition planning checklist for Family Resource Coordinator, and more!

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.

🏠 Home / Child / Edit

First Steps ID: 65 - Spencer-Test, Robert - DOB: 6/16/2021

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | **1** IFSP | Services | Child/Family Outcomes | Transition |

Transfer, Exit, & Close   Document

IFSP

⊞ IFSP   -Default Report- ⚙ ⤢ −

Add IFSP   Excel

🔍 Search...   Rows per page 10 ⌄

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	Draft				06/26/2023	12/26/2023		True	View / Edit **2**

Showing 1 to 1 of 1 entries   Prev 1 Next

Transition
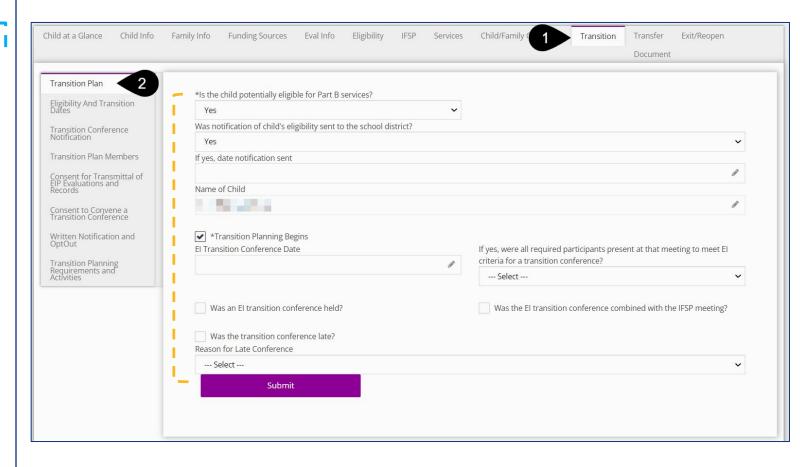## *Transition Plan*

How To

Start a Transition Record

Notes

An asterisk (*) indicates a required field.

- The Transition Plan To begin a transition record and save/submit all Transition panels. the **Transition Plan** panel and the "Transition Planning Begins' checkbox are required. NO transition information can be entered UNLESS the 'Transition Planning Begins' checkbox is checked.

- Once checked and saved, the **Transition Planning Begins** checkbox **cannot** be unchecked.

- Most fields on the **Transition Plan** panel are **not required** as this panel may be completed **prior to** a transition conference occurring.

- The **EI Transition Conference Date** field is the actual date the conference occurred. **Future dates cannot be entered**. This is not a required field 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.
2. The screen defaults to the **Transition Plan** panel. The name of the child auto-populates.
3. Select **(Yes/No)** from the **Is the child potentially eligible for Part B services?** drop-down. This field is required.
4. Select **(Yes/No)** from the **Was notification of child's eligibility sent to the school district?** drop-down.
5. If yes, enter the **Date the Notification** was sent.
6. The **Name of Child** auto-populates.
7. Click the **Transition Planning Begins** checkbox.
8. Enter the **EI Transition Conference Date**, if one was held. This should be the actual date the conference was held.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family (**1** | **Transition** | Transfer | Exit/Reopen |
| | | | | | | | | | | Document | |

Transition Plan **2**

Eligibility And Transition Dates

Transition Conference Notification

Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Written Notification and OptOut

Transition Planning Requirements and Activities

*Is the child potentially eligible for Part B services?
> Yes

Was notification of child's eligibility sent to the school district?
> Yes

If yes, date notification sent
> ✏

Name of Child
> ▒▒▒▒▒ ✏

☑ *Transition Planning Begins

EI Transition Conference Date
> ✏

If yes, were all required participants present at that meeting to meet EI criteria for a transition conference?
> --- Select ---

☐ Was an EI transition conference held?

☐ Was the EI transition conference combined with the IFSP meeting?

☐ Was the transition conference late?
Reason for Late Conference
> --- Select ---

Submit

Transition
Transition Discussion

🔍 How To

Enter Transition Discussion Details on an IFSP

ℹ️ Notes

- An asterisk (*) indicates a required field.

Step / Action

1. While in the IFSP, select the **IFSP Transition** panel.
2. Fill in all required fields beginning with the **Has Transition been discussed with the family** field.

Transition
Transition Plan

🔍 How To
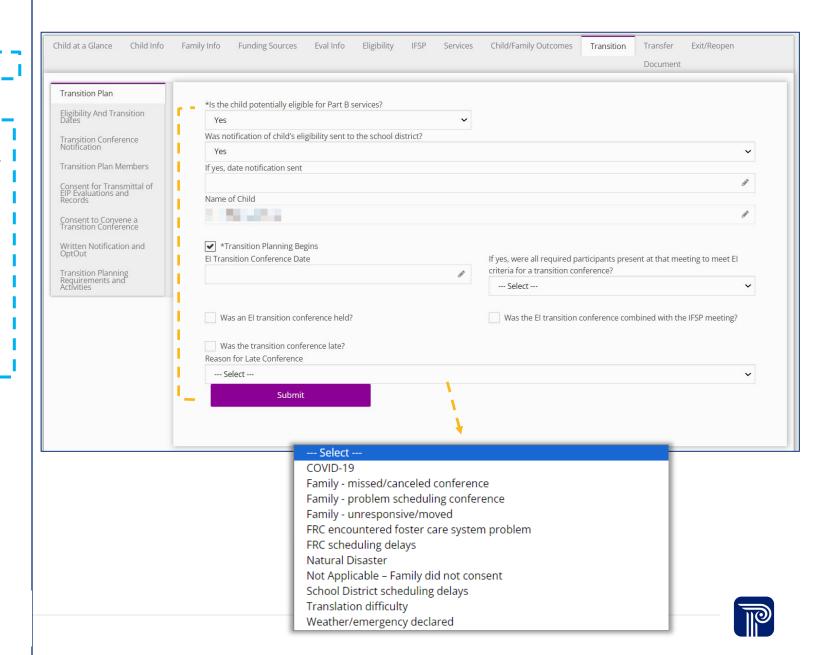Start a Transition Record

ℹ️ Notes

- An asterisk (*) indicates a required field.

- To begin a transition record and save/submit all Transition panels. the **Transition Plan** panel and the "Transition Planning Begins' checkbox are required. NO transition information can be entered UNLESS the 'Transition Planning Begins' checkbox is checked.

- Once checked and saved, the 'Transition Planning Begins' checkbox **cannot** be unchecked.

- Most fields on the **Transition Plan** panel are **not required** as this panel may be completed **prior to** a transition conference occurring.

- If the **Was the transition conference late** checkbox remains unchecked, the **Reason for Late Conference** drop-down is not selectable.

Step / Action

1. Select **(Yes/No)** from the **Were all required participants present at that meeting to meet EI criteria for a transition conference?** drop-down, if applicable.
2. Select the **Was an EI transition conference held** checkbox, if applicable.
3. Select the **Was the EI transition conference combined with the IFSP Meeting** checkbox if the EI transition conference was combined with the IFSP Meeting.
4. Select the **Was the transition conference late** checkbox, if applicable.
5. If the transition conference was late, select a reason for the late conference from the **Reason for the Late Conference** drop-down (i.e., Family-problem scheduling conference).
6. Select the **Submit** to save your entry.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen |

Document

Transition Plan
- Eligibility And Transition Dates
- Transition Conference Notification
- Transition Plan Members
- Consent for Transmittal of EIP Evaluations and Records
- Consent to Convene a Transition Conference
- Written Notification and OptOut
- Transition Planning Requirements and Activities

*Is the child potentially eligible for Part B services?
Yes

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

If yes, date notification sent

Name of Child

☑ *Transition Planning Begins
EI Transition Conference Date

If yes, were all required participants present at that meeting to meet EI criteria for a transition conference?
--- Select ---

☐ Was an EI transition conference held?

☐ Was the EI transition conference combined with the IFSP meeting?

☐ Was the transition conference late?
Reason for Late Conference
--- Select ---

Submit

--- Select ---
COVID-19
Family - missed/canceled conference
Family - problem scheduling conference
Family - unresponsive/moved
FRC encountered foster care system problem
FRC scheduling delays
Natural Disaster
Not Applicable – Family did not consent
School District scheduling delays
Translation difficulty
Weather/emergency declared

Transition
Eligibility And Transition Dates

How To

View Important Eligibility and Transition dates (View-Only Panel)

Notes

- The **Eligibility and Transition Dates** panel (read-only) calculates all actual transition activity due dates, this information is already built into ACORN and auto-populates based on the child's DOB.

- This panel removes the work of manually tracking and calculating transition dates.

Step / Action

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

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen | Document |

Transition Plan

Eligibility And Transition Dates ①

Transition Conference Notification

Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Written Notification and OptOut

Transition Planning Requirements and Activities

Child's Date of Birth

10/16/2020

Transition Conference Convened no earlier than

01/16/2023

Transition
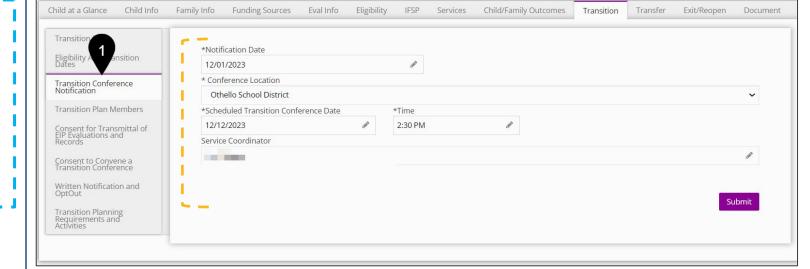## *Transition Conference Notification*

How To

View and Edit a Transition Conference Notification

Notes

An asterisk (*) indicates a required field.

- The **Transition Conference Notification** panel is a planning aid that notes the transition conference notification details sent to the transition partner/LEA chairperson/designee and/or other identified transition conference participants.

- The **Parent Name** on this panel auto-populates.

- The **Conference Date** is the "Scheduled Date". This could be a future expected date.

- The **Conference Location** field reflects the school district in which the child resides not the actual location of the conference.

Step / Action

1. Select the **Transition Conference Notification** panel.
2. Enter **Notification Date**. The date can be entered manually or selected using the calendar feature.
3. The **Conference Location** field auto-populates based on information previously entered into the child's record.
4. Enter the scheduled transition conference date and time from the **Scheduled Transition Conference Date** and **Time** fields. The date and time can be entered manually or selected using the calendar and time feature.
5. The **Service Coordinator** field auto-populates with the name of the Family Resource Coordinator/Service Coordinator.
6. Select the **Submit** button to save your entry.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen | Document |

Transition

Eligibility And Transition Dates

Transition Conference Notification

Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Written Notification and OptOut

Transition Planning Requirements and Activities

1

*Notification Date
12/01/2023

* Conference Location
Othello School District

*Scheduled Transition Conference Date
12/12/2023

*Time
2:30 PM

Service Coordinator

Submit

Transition
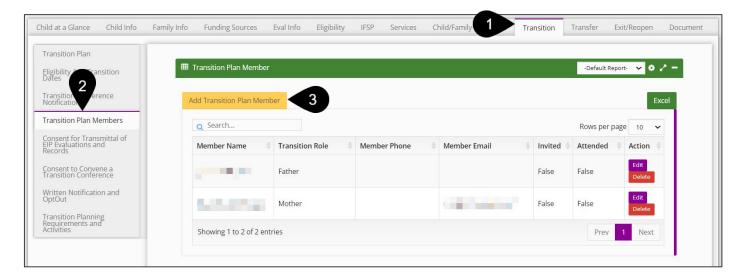## *Transition Plan Members*
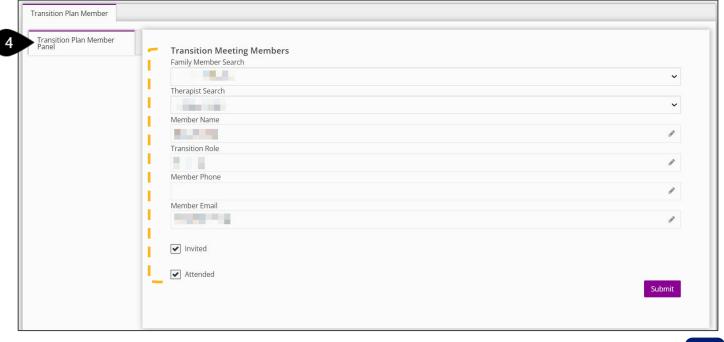
How To

View and Enter Transition Plan Members

Note

- **The Transition grid/table** houses the child's transition conference participants/invitees.

- Only one Transition Plan member can be added at a time.

- If a Family Member is not available for selection, please check the status of that family member within the **Family Info** tab.

- You may return and modify a participant's invitation/attendance status.

- If a Therapist is not available for selection, please check the status of that provider within the **Services** tab.

Step / Action

1. Select the **Transition** tab.
2. Select the **Transition Plan Members** panel. The **Transition Plan Member** grid populates.
3. Select the **Add Transition Plan Member** button.
4. The **Transition Plan Member** pane populates.
5. Select a Member from the **Family Member Search** or **Therapist Search** drop-down.
6. The selected Member information auto-populates in the **Member, Transition Role, Member Phone,** and **Member Email** fields (if entered in previous tabs such as the Family tab).
7. Select the checkbox, **"Invited"** if the member has been invited to the conference.
8. Select the checkbox, **"Attended "**if the member has attended the conference.
9. Select the **Submit** button to save your entry.

Child at a Glance	Child Info	Family Info	Funding Sources	Eval Info	Eligibility	IFSP	Services	Child/Family	**1** Transition	Transfer	Exit/Reopen	Document

Transition Plan

Eligibility & Transition Dates

Transition Conference Notification

2 Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Written Notification and OptOut

Transition Planning Requirements and Activities

⊞ Transition Plan Member   -Default Report-

Add Transition Plan Member   **3**   Excel

🔍 Search...   Rows per page 10

Member Name	Transition Role	Member Phone	Member Email	Invited	Attended	Action
	Father			False	False	Edit / Delete
	Mother			False	False	Edit / Delete

Showing 1 to 2 of 2 entries   Prev 1 Next

Transition Plan Member

4 Transition Plan Member Panel

Transition Meeting Members

Family Member Search

Therapist Search

Member Name

Transition Role

Member Phone

Member Email

☑ Invited

☑ Attended

Submit

Transition
EI Services Ending Details & Post Transition Services

How To

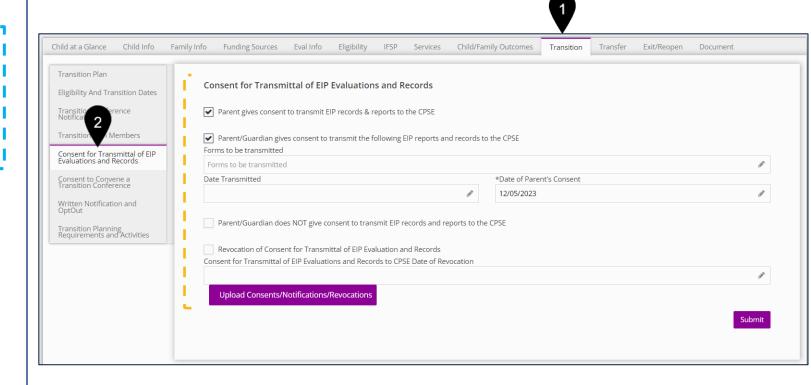Complete a Consent for Transmit of EIP Evaluations and Records

Note

An asterisk (*) indicates a required field.

The **Consent for Transmittal of EIP Evaluations and Record panel** captures consent for the Early Intervention Program (EIP) to transmit evaluations and records for a child's transition process. Users may upload paper copies of consent through this panel.

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

Step / Action

1. Select the **Transition** tab.
2. Select the **Consent for Transmittal of EIP Evaluation and Records** Panel.
3. Select the **Parent Gives Consent to Transmit EIP Records & Reports to the CPSE** checkbox, if applicable.
4. Select the **Parent/Guardian Gives Consent to Transmit the Following EIP Reports and Records to the CPSE** checkbox, if applicable.
5. Enter **Forms to be Transmitted**.
6. Enter the **Date Transmitted.**
7. Enter the **Date of Parent's Consent.** The date can be entered manually or selected using the calendar feature.
8. Select the **Parent/Guardian Does NOT Give Consent to Transmit EIP Records and Reports to the CPSE** checkbox, if applicable.
9. Select the **Revocation of Consent for Transmittal of EIP Evaluation and Record** checkbox, if applicable.
10. Enter **Consent for Transmittal of EIP Evaluations and Records to CPSE Date of Revocation**. The date can be entered manually or selected using the calendar feature.
11. Select the **Submit** button to save your entry.

Transition
EI Services Ending Details & Post Transition Services

How To

Complete a Consent to Convene a Transition Conference

Note

An asterisk (*) indicates a required field.

The **Consent to Convene a Transition Conference** panel records a child's transition conference schedule (i.e., the conference location and the time)

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

Step / Action

1. Select the **Consent to Convene a Transition Conference** panel.
2. Select the **Parent/Guardian Gave Consent to Arrange a Transition Conference** checkbox, if applicable.
3. Select the **Parent/Guardian Did NOT Consent to Arrange a Transition Conference** checkbox, if applicable.
4. Provide a **Reason for Declining Transition Conference**, if applicable.
5. Enter the **Date of Parent's Decision.** This date can be entered manually or selected using the calendar feature.
6. Select the **Revocation to Convene a Transition Conference** checkbox, if applicable.

Transition
EI Services Ending Details & Post Transition Services

🔍 **How To**

Complete a Consent for Transmit of EIP Evaluations and Records

ℹ️ **Note**

An asterisk (*) indicates a required field.

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

Step / Action

1. Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications and revocations.
2. The **Upload/Consents Notifications/Revocations** dialogue box populates enabling the selection and upload of relevant documents types.
3. Select the **Submit** button to save your entry.

Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | **Transition** | Transfer | Exit/Reopen | Document

Transition Plan
Eligibility And Transition Dates
Transition Conference Notification
Transition Plan Members
Consent for Transmittal of EIP Evaluations and Records
Consent to Convene a Transition Conference
Written Notification and OptOut
Transition Planning Requirements and Activities

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
Forms to be transmitted
Forms to be transmitted

Date Transmitted   *Date of Parent's Consent
                                          12/05/2023

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

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

1 — Upload Consents/Notifications/Revocations

3 — Submit

Upload Consents/Notifications/Revocations ✕

Document Area : Transition
*Document Type
Form Template
.doc,.docx,*.odt,*.pdf,

*Document Name
Consent Form
2 — Choose File   No file chosen
Notes

Upload   Cancel

Transition
EI Services Ending Details & Post Transition Services

How To
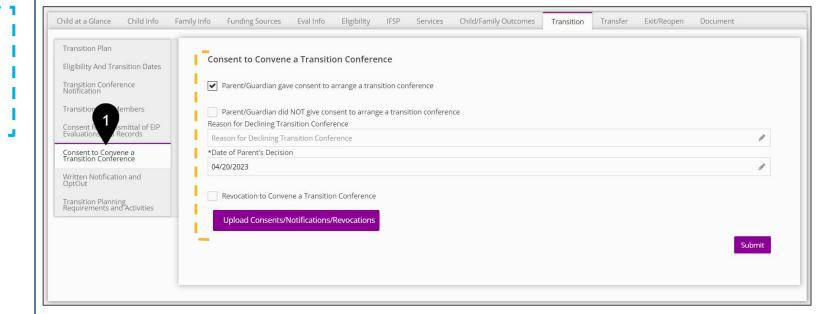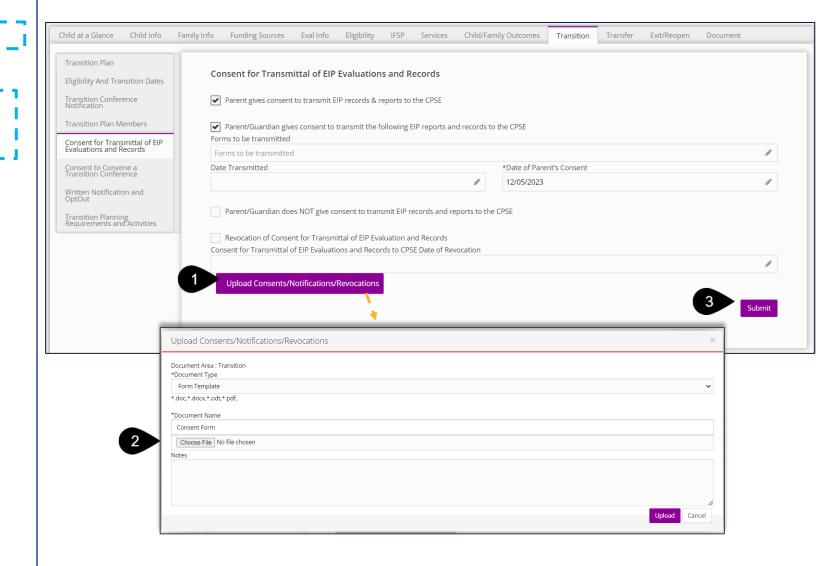
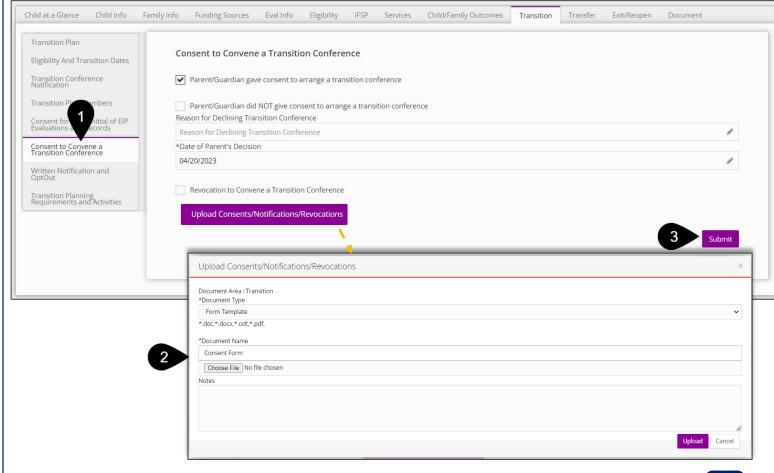Complete a Consent to Convene a Transition Conference

Note

An asterisk (*) indicates a required field.

The **Consent to Convene a Transition Conference** panel records a child's transition conference schedule (i.e., the conference location and the time)

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

Step / Action

1. Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications and revocations.
2. The **Upload/Consents Notifications/Revocations** dialogue box populates enabling the selection and upload of relevant documents types.
3. Select the **Submit** button to save your entry.

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen | Document |

Transition Plan

Eligibility And Transition Dates

Transition Conference Notification

Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

Written Notification and OptOut

Transition Planning Requirements and Activities

Consent to Convene a Transition Conference

☑ Parent/Guardian gave consent to arrange a transition conference

☐ Parent/Guardian did NOT give consent to arrange a transition conference
Reason for Declining Transition Conference

Reason for Declining Transition Conference

*Date of Parent's Decision

04/20/2023

☐ Revocation to Convene a Transition Conference

Upload Consents/Notifications/Revocations

3 Submit

Upload Consents/Notifications/Revocations   ×

Document Area : Transition
*Document Type

Form Template

.doc,.docx,*.odt,*.pdf,

*Document Name

Consent Form

Choose File No file chosen

Notes

Upload Cancel

Transition
EI Services Ending Details & Post Transition Services

How To
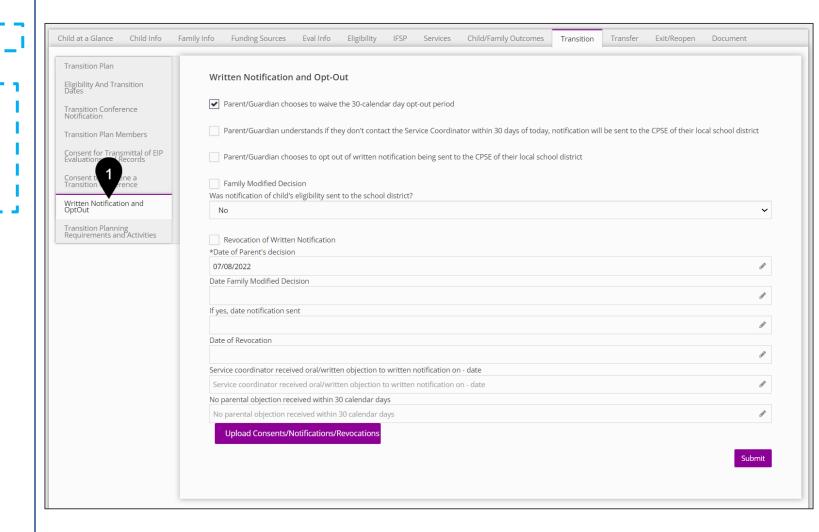Complete a Written Notification and Opt-Out

Note
An asterisk (*) indicates a required field.

The **Written Notification and OptOut** panel captures written notification consents required for the transition process. Paper copies of consent may also be uploaded through this panel.

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 (i.e., Parent/Guardian chooses to waive the 30-calendar day opt-out period).
3. Select **(Yes/No)** to whether **Notification of Child's Eligibility was Sent to the School District**.
4. Select the **Revocation of Written Notification** checkbox, if there is written notification of revocation on file.
5. Enter the **Date of the Parent's Decision.** The date can be entered manually or selected using the calendar feature.
6. Enter the **Date Family Modified Decision**, if applicable.
7. Enter the **Date of Revocation**, if applicable**.** The date can be entered manually or selected using the calendar feature.
8. Enter the date the **Service Coordinator Received Oral/Written Objection to Written Notification**. The date can be entered manually or selected using the calendar feature.
9. If **No Parental Objection Received within 30 Calendar Days,** enter the date the parent objection was received. The date can be entered manually or selected using the calendar feature.

Transition
EI Services Ending Details & Post Transition Services

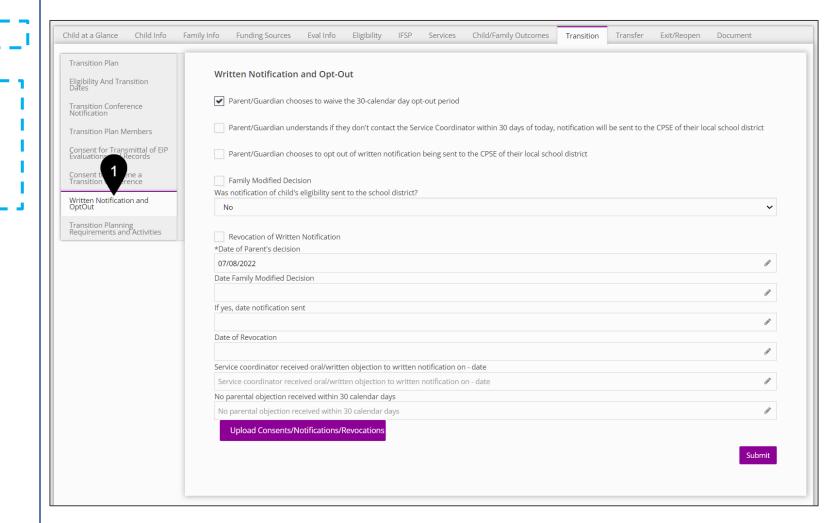### 🔍 How To

Complete a Written Notification and Opt-Out

ℹ️ Note

An asterisk (*) indicates a required field.

The **Written Notification and OptOut** panel captures written notification consents required for the transition process. Paper copies of consent may also be uploaded through this panel.

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

Step / Action

1. Select the **Upload Consents/Notifications/Revocations** button to upload documents associated with consents, notifications, and revocations. The **Upload/Consents Notifications/Revocations** dialogue box populates enabling the selection and upload of relevant document types.
2. Select the **Submit** button to save your entry.

Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | **Transition** | Transfer | Exit/Reopen | Document

Transition Plan
Eligibility And Transition Dates
Transition Conference Notification
Transition Plan Members
Consent for Transmittal of EIP Evaluation Records
Consent to Convene a Transition Conference
Written Notification and OptOut
Transition Planning Requirements and Activities

Written Notification and Opt-Out

☑ 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

☐ Family Modified Decision
Was notification of child's eligibility sent to the school district?

No

☐ Revocation of Written Notification
*Date of Parent's decision

07/08/2022

Date Family Modified Decision

If yes, date notification sent

Date of Revocation

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

Upload Consents/Notifications/Revocations

Submit

Transition
EI Services Ending Details & Post Transition Services

How To

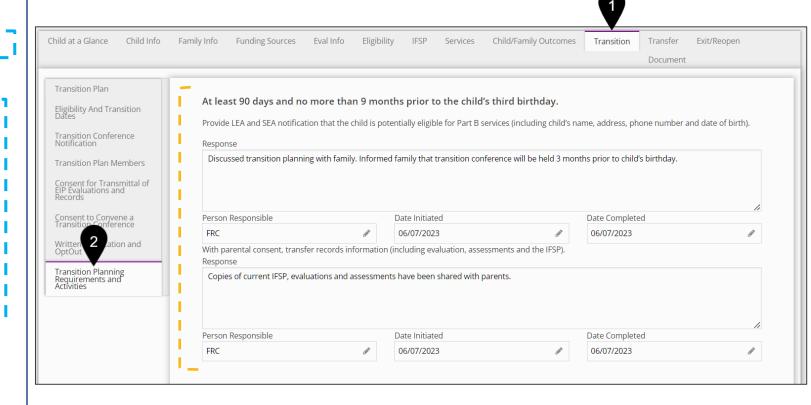Utilize the Transition Planning and Requirements/Activities Tool

Note

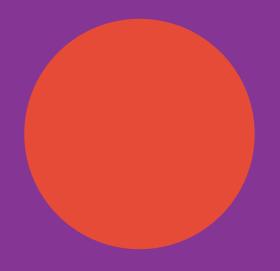An asterisk (*) indicates a required field.

The **Transition Planning Requirements and Activities** panel is an optional tool to aid Family Resource Coordinators (FRC) in working with families through the transition process and related activities (at the transition conference).

This panel serves as a checklist (with specific transition milestones) outlining activities and requirements associated with the transition process. FRCs can delegate transition activities, assign dates to activities, and mark activities as complete to ensure all transition activities and requirements are completed on time.

1

| Child at a Glance | Child Info | Family Info | Funding Sources | Eval Info | Eligibility | IFSP | Services | Child/Family Outcomes | Transition | Transfer | Exit/Reopen Document |

Transition Plan

Eligibility And Transition Dates

Transition Conference Notification

Transition Plan Members

Consent for Transmittal of EIP Evaluations and Records

Consent to Convene a Transition Conference

2 Written Notification and OptOut

Transition Planning Requirements and Activities

At least 90 days and no more than 9 months prior to the child's third birthday.

Provide LEA and SEA notification that the child is potentially eligible for Part B services (including child's name, address, phone number and date of birth).

Response

Discussed transition planning with family. Informed family that transition conference will be held 3 months prior to child's birthday.

Person Responsible	Date Initiated	Date Completed
FRC	06/07/2023	06/07/2023

With parental consent, transfer records information (including evaluation, assessments and the IFSP).

Response

Copies of current IFSP, evaluations and assessments have been shared with parents.

Person Responsible	Date Initiated	Date Completed
FRC	06/07/2023	06/07/2023

Thank you!

Revision History

Version Number	Release Date	Author	Revision Summary
v.1	9.15.2023	Courtney Pittman	Final draft before second Tier-1 state training
V.2	11.23.2023	Courtney Pittman	Updated to reflect the addition of the potential eligibility drop-down.