

**To:** Service Providing Agency (SPA) Service Coordinators (SCs), Supervisors and Individualized Family Service Plan (IFSP) Team

**Date:** 05-11-2023

**Subject:** Transition

This bulletin is meant to:

- Remind SPAs that the AzEIP Transition Process online training is available through TraCorp
- Assist SPAs, SCs, and providers in following the appropriate policy and procedures for Transition
- Share transition activity requirements, timelines, opportunities, and necessary documentation
- Notify SPAs of updates to the IFSP Transition Meeting Invitation (GCI-1032A), Public Education Agency (PEA) Notification/Referral (GCI-1037A), and Transition Conference Summary (GCI-1033A)

## AzEIP Transition Process Online Training

The AzEIP Transition Process is an online training available in TraCorp (DEAEIP1905). This training is required for all Early Intervention SCs. It is highly recommended that all other team members, including supervisors, also complete the training, as it will assist teams to ensure compliance, enhance quality, and support smooth transitions for children and families.

This training covers the entire AzEIP Transition Process, including updates to the Transition Timeline and PEA Notification/Referral form. The purpose of this training is to provide guidance on the Arizona Part C to Part B Transition Process, including transition timelines and requirements, SC responsibilities, school district responsibilities, and roles of other team members.

## TRANSITION PLANNING MEETING (TPM)

- **Requirements:**
  - Mandatory meeting to document the family's transition plan
  - Must meet the requirements of an IFSP meeting (*AzEIP Policy Manual 4.3.3*)
- **Timeline:**
  - Always reference the [AzEIP Transition Timeline](#) to ensure timeliness

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- The date by which the Transition Planning Meeting must be held is based on the child's age at AzEIP eligibility
- **Opportunity to:**
  - Provide and discuss the resources below with each family to support their decision-making and understanding of the transition process:
    - [Transition Guide for Families: What You Need to Know Before Your Child's Third Birthday](#)
    - [Transitioning from AzEIP, First Steps Video](#) or [Transitioning from AzEIP, First Steps \(American Sign Language\) Video](#)
  - Discuss all preschool, community, and public options available to a child and family after age three (3)
  - Document the specific options unique to each child and family that the family is interested in, including steps needed and tentative timelines to ensure a smooth transition
  - Develop or update outcomes to support the child's transition from early intervention
  - Determine if additional supports or services are needed until the child exits early intervention
  - Discuss the required PEA Notification/Referral to the school district of residence and Arizona Department of Education (ADE) including the sharing of demographic information about the child and family
  - Discuss with the family their option to opt out of the required PEA Notification/Referral in writing if they do not want their information shared
  - Explore and discuss with the family the benefits of holding a Transition Conference, including:
    - Sharing information about their child
    - Learning about the services/programs available
  - Document the family's decision to hold or decline a Transition Conference
    - If in agreement, who the family would like to invite
    - *Note:* a family can decline a Transition Conference even if a PEA Notification/Referral is sent
- **Documentation** (*must be maintained in the child's record*):
  - Invitation to Transition Planning Meeting
  - Complete IFSP, including detailed transition plan that is unique to the child
  - All SC and Provider Contact Logs, including all coordination efforts to schedule with all participants
  - Copies of emails (must contain date sent, all recipients, and attachments)

## PUBLIC EDUCATION AGENCY (PEA) NOTIFICATION/REFERRAL

- **Requirements:**

- Ensure the PEA Notification/Referral form is complete and accurate before submitting to avoid PEA Errors
  - Double Check child's AzEIP Eligibility Date, I-TEAMS ID, DOB, etc. before sending to the school district and Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov))
- Include AZEDS Number from I-TEAMS Transition page
- Identify the child's school district of residence
  - [What School District Are You In? District Boundary Map | GreatSchools](#)
  - Email Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov)) if there are any questions about the correct school district
- Use the PEA Update Section(s) of the original PEA Notification/Referral form to report changes, including but not limited to:
  - Family originally opted out and now wants to transition
  - Family moved from within one school district boundary to another
- Once a PEA Notification/Referral form has been sent, any family changes (e.g., decision on transition conference, relocation, household composition, custody) must be communicated to the school district by email or phone and Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov))
  - The school district that received the PEA Notification/Referral is responsible for completing the evaluation, determining eligibility, and developing the Individualized Education Plan (IEP) (if the child is found eligible) before the child's third birthday
  - The school district that received the PEA Notification/Referral and the new school district of residence are encouraged to work together to ensure timely completion of the evaluation

- **Timeline:**

- Always reference the [AzEIP Transition Timeline](#) to ensure timeliness
- The date by which the PEA Notification/Referral form must be sent is based on the child's age at AzEIP eligibility
- A PEA Notification/Referral form should not be sent prior to the date the child is 2.3 or after the date the child is 2.10 ½
- Submit a [Child Find Referral Form](#) to the school district and Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov)) in lieu of a PEA Notification/Referral form for:
  - Children determined AzEIP eligible after 2 years 10 ½ months of age
  - Families who initially opt out and then opt back in after the child is 2 years 10 ½ months of age

- **Opportunity to:**
  - Begin the collaborative process between the AzEIP SPA and local school district
  - Communicate with the school district about the timing for a Transition Conference if the family would like to have one
    - Coordinate with the school district to identify their preferred method for communication (phone, email, fax)
    - Begin scheduling early to ensure a mutually agreed upon time and place that is convenient for the family can be identified for the meeting
      - Share the date the transition conference is due and the family's availability
      - Ask for the school district's availability
    - For Transition Conferences that need to be held quickly to meet timelines, make certain the school district is aware of the short timeframes
    - Be specific and confirm all dates with agreed upon times
  - Encourage family to maintain contact with the original school district if more than one school district is involved to ensure preschool eligibility is determined and an IEP is developed (if eligible) before the child's third birthday
- **Documentation** (*must be maintained in the child's record*):
  - PEA Notification/Referral form
  - Complete IFSP, including date PEA Notification/Referral form was sent or date parent opted out
  - All SC and Provider Contact Logs
  - Copies of emails to the school district and as applicable to the Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov)) (must contain date sent, all recipients, and attachments)

## TRANSITION CONFERENCE (TC)

- **Requirements:**
  - The Transition Conference is an AzEIP meeting that must be completed within required timeframes
  - The SC is responsible for:
    - Collaborating, coordinating and documenting the efforts made to schedule the Transition Conference with the family, the local school district, all active IFSP Team Members, and anyone else the family wishes to include
      - Collaborating to schedule the transition conference includes back and forth communication between all parties to determine the best date for the transition conference
      - All communication (successful and unsuccessful) must be fully documented through contact logs and written correspondence

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- Scheduling should begin immediately after the Transition Planning Meeting for those families who agree to a transition conference
- The Invitation to the Transition Meeting should be sent as soon as the date, time and location have been agreed upon (even if this is several months prior to the transition conference date)
- When scheduling a transition conference that is on a short timeline, the SC is highly encouraged to contact the school district via telephone to collaborate and schedule the meeting before sending the Invitation to the Transition Meeting
- Sending an email to the school district with a pre-determined date for the Transition Conference as the sole communication is not considered collaborating, coordinating, and inviting a school district to a Transition Conference
- Sending the invitation to all participants, including all active IFSP Team Members and the school district
  - All active IFSP Team Members and the school district are required to attend the Transition Conference
  - Ensure the invitation is provided as early as possible to allow for attendance
  - Even on short notice the active IFSP Team Members and school district need to be given the opportunity to attend
  - If a school district does not cooperate in the coordination or declines to attend at the proposed time, the SC is to email documentation of coordination attempts to Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov)) and cc: [AzEIPQualityImprovement@azdes.gov](mailto:AzEIPQualityImprovement@azdes.gov)
- Ensuring the transition conference is held in accordance with required timelines
- Facilitating the transition conference discussion, including:
  - Initiating introductions of all participants
  - Describing the meeting's purpose
  - Empowering everyone to contribute
  - Identifying agreed upon next steps
- Presenting materials and information on behalf of the PEA Representative in the rare event that a school district is not able to attend the Transition Conference (*AzEIP Procedure Manual 4.4.3.G.1*)
- Reviewing existing data (medical records, evaluation/assessments, progress documentation, etc)
- Transition Conference must meet the requirements of an IFSP meeting (*AzEIP Policy Manual 4.5.6*) and IFSP pages must be reviewed/updated
  - At minimum: IFSP Transition, Services, Payment Arrangements, Informed Consent, and IFSP Team pages must be updated

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- As needed: Child and Family (page 2 of the IFSP), Child and Family Assessment, including Child Indicators Summary, and Outcomes pages may also be updated
- Completed documentation from the Transition Conference must be sent within 10 business days to meeting participants
- With parent's written Consent To Share, information such as the IFSP, Developmental Evaluation Report, Quarterly Progress Reports, Contact Logs, etc. is provided to the school district
- If the school district needs additional information to determine preschool eligibility, it is the responsibility of the school district to conduct any further assessments that may be necessary to determine eligibility for preschool
- **Timeline:**
  - Always reference the [AzEIP Transition Timeline](#) to ensure timeliness
  - The date by which the Transition Conference must be held is based on the child's age at AzEIP eligibility
- **Opportunity to:**
  - Develop or update the IFSP Transition Plan
  - Allow the school district and the family to schedule a tour or visitation of classroom(s)/campus
  - Discuss and document preschool options, schedule, transportation needs, health concerns, family concerns, and any other resources needed to be provided
  - Identify next steps for a smooth transition, including responsible person(s) and date(s) to be completed
  - Allow the school district to share information about preschool eligibility, including the Preschool Multidisciplinary Evaluation Team (MET) and the Individualized Education Plan (IEP) processes
  - Remind the parents they may invite anyone they would like to the MET/IEP meeting(s)
  - Encourage family to maintain contact with the original school district if more than one school district is involved to ensure preschool eligibility is determined and an IEP is developed (if eligible) before the child's third birthday
- **Documentation** (*must be maintained in the child's record*):
  - Invitation to Transition Conference
  - Complete IFSP, including updates to the transition plan
  - Transition Conference Summary, including discussion and agreed upon next steps
  - All SC and Provider Contact Logs, including all coordination efforts to schedule with all participants
  - Copies of emails (must contain date sent, all recipients, and attachments)

## **General Reminders**

- Every family should be provided the resources below before or during their child's Transition Planning Meeting to support their decision-making and understanding of the transition process:
  - [Transition Guide for Families: What You Need to Know Before Your Child's Third Birthday](#)
  - [Transitioning from AzEIP, First Steps Video](#) or [Transitioning from AzEIP, First Steps \(American Sign Language\) Video](#)
- When a child's record is transferred to a new SC and/or new SPA, ensure that:
  - The school district, family, and IFSP Team are notified of the changes
  - Contact information for the new SC is provided to everyone involved and the Arizona Department of Education (ADE) ([c2binbox@azed.gov](mailto:c2binbox@azed.gov))
  - Copies of all transition documents, including Contact Logs and emails, are available in the child's record
  - If a Transition Conference is scheduled, the transferring SC must notify the receiving SC to ensure the meeting can be held as scheduled
    - Transferring SC should not cancel a scheduled Transition Conference
- If a Transition Conference needs to be rescheduled due to an exceptional circumstance:
  - New date and time must be convenient for the family
  - All invited participants must be notified as soon as possible
  - A new IFSP Transition Meeting Invitation must be provided to all invited participants
  - A copy of the new invitation and email must be retained in the child's record
- Once a PEA Notification has been sent, any family changes (e.g., decision on transition conference, relocation, household composition, custody) must be communicated to the school district and ADE ([c2binbox@azed.gov](mailto:c2binbox@azed.gov)) and documented in the SC's Contact Log.
- Include as much detail as possible in correspondence with the school district, including:
  - Family's date/time/location preference for Transition Conference (if no preferred date/time/location, let that be known)
  - Due Date for Transition Conference
- All fields on AzEIP forms must be completed with the required information
  - If the field is not relevant, indicate using N/A
  - SCs should review all documentation prior to ending a meeting to ensure that all areas on the form are fully completed
- SPAs need to have plans in place to ensure:
  - For children determined AzEIP eligible after 2 years 6 months (2.6) of age, AzEIP eligibility information is shared with the SC so that the PEA Notification can be sent timely (within one (1) business day following the day AzEIP eligibility is determined)

- PEA Notification is submitted timely in the event the assigned SC is unable to do so
- Training is provided to new SCs on the AzEIP Transition Timeline, including nuances in the timeline based on the child's age at AzEIP eligibility
- Transition timelines and documentation are being regularly monitored and reviewed for ongoing compliance and quality

## **Transition Resources and Tools**

- AzEIP Transition Process Webinar (in [TraCorp](#): DEAEIP1905)
- [AzEIP Transition Process Webinar \(PDF\)](#)
- [AzEIP Transition Timeline](#)
- Child Contract Report (in [I-TEAMS](#))
- [Division for Early Childhood Transition Module](#)
- [OSEP Policy letter on Part C to Part B Transition 03-17-2023](#)
- Transition Compliance Report (in [I-TEAMS](#))
- [Transition from Early Intervention Services to Part B Preschool Special Education Checklist](#)
- [Transition Guide for Families: What You Need to Know Before Your Child's Third Birthday](#)
- [Transitioning from AzEIP, First Steps Video](#)
- [Transitioning from AzEIP, First Steps \(American Sign Language\) Video](#)

## **Updated Transition Forms**

The AzEIP Office is excited to announce three (3) transition documents have been updated and are now available in the DES Document Center in both English and Spanish.

Effective immediately and moving forward, please ensure that the most recent version of each form is used.

Highlights of the changes in the forms are provided below for your reference.

## Highlights of Changes to the [IFSP Transition Meeting Invitation Prior Written Notice \(GCI-1032A\)](#)

Type of Change	Location of Change	Change	Instructions
Wording	<i>Header</i>	IFSP Transition Meeting Invitation Prior Written Notice	Notice: title of form has changed
Drop Down Selection	<i>Top section</i>	You are invited to participate in:	Electronically: Select type of meeting that will be held  Handwritten: Enter type of meeting that will be held
Location	<i>Top section</i>	The meeting is scheduled for:	Enter the date, time, and location of the meeting
Wording	<i>Top section</i>	Added additional details to describe the purpose of the IFSP transition meeting and that the invitation serves as prior written notice for the IFSP transition meeting	Electronically: The blank space in the second sentence will automatically populate based on the type of meeting selected  Handwritten: Enter word below based on type of meeting that will be held <ul style="list-style-type: none"> <li>• develop = IFSP TPM and IFSP TPM/TC Combined</li> <li>• update = IFSP TC</li> </ul>
Wording	<i>Participants Invited</i>	Role	Notice: IFSP Team Lead and School District/Public Education Agency (PEA) Representative now specified  Parent(s), AzEIP SC, IFSP Team Lead, and School District/Public Education Agency (PEA) Representative must be invited
New information for parents	<i>Bottom section</i>	As the parent(s) of a child who is involved with AzEIP, you have protections under the Individuals with Disabilities Education Act (IDEA).	Notice: link and QR code for family to access the Child and Family Rights booklet have been added

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Wording	<i>Bottom section</i>	Service Providing Agency	<p>Electronically: Select assigned Service Providing Agency (SPA) from drop down list</p> <p>Handwritten: Enter specific SPA name (do not write "AzEIP")</p>
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### Highlights of Changes to the [PEA Notification/Referral Form \(GCI-1037A\)](#)

Type of Change	Location of Change	Change	Instructions
Wording	<i>Page 1: top section</i>	Date PEA Notification/Referral Sent to School District*	Enter date PEA form was emailed/faxed to school district
New Field	<i>Page 1: Child's Information section</i>	Date PEA Notification/Referral Sent to ADE (required if eligible after 2.6*)	Enter date PEA form was emailed/faxed to ADE
New Field	<i>Page 1: Child's Information section</i>	AZEDS ID (found on I-TEAMS Transition Child page)*	Enter AZEDS ID from I-TEAMS Transition Child page*
Wording and Drop Down Selection	<i>Page 1: Child's Information section</i>	Full Name of School District (no acronyms)*	<p>Electronically: Select school district from drop down list</p> <p>Handwritten: Enter full name of school district (do not use acronyms)</p>
New Field and Drop Down Selection	<i>Page 1: Referring Service Providing Agency</i>	Region*	<p>Electronically: Select region in which the child resides from the drop down list</p> <p>Handwritten: Enter region</p>
Wording and Drop Down Selection	<i>Page 1: Referring Service Providing Agency</i>	Service Providing Agency*	<p>Electronically: Select assigned Service Providing Agency (SPA) from drop down list</p> <p>Handwritten: Enter specific SPA</p>

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			name (do not write "AzEIP")
Wording	<i>Page 1, Opt-Out section</i>	2 years, 6 months has replaced 2 year, 9 months	Reminder: for children determined AzEIP eligible after 2 years, 6 months, if parent would like to opt-out, they must sign the PEA Notification/Referral form no later than the date AzEIP eligibility is determined
Wording	<i>Page 2: top section of Update 1 and Update 2</i>	Date this PEA Update Sent to School District*	Enter date the updated PEA form was emailed/faxed to school district
Wording	<i>Page 2: top section of Update 1 and Update 2</i>	Date this PEA Update Sent to ADE*	Enter date the updated PEA form was emailed/faxed to ADE
Wording and Drop Down Selection	<i>Page 2: Child's Information section of Update 1 and Update 2</i>	New School District of Residence*	Electronically: Select new school district from drop down list  Handwritten: Enter full name of new school district (do not use acronyms)
Field Removed	<i>Page 2: Child's Information section of Update 1 and Update 2</i>	Transition Status Update	No longer applicable
New Field and Drop Down Selection	<i>Page 2: Referring Service Providing Agency section of Update 1 and Update 2</i>	Region*	Electronically: Select region in which the child resides from the drop down list  Handwritten: Enter region
Wording and Drop	<i>Page 2: Referring</i>	Service Providing Agency Name*	Electronically: Select assigned Service Providing Agency (SPA)

Down Selection	<i>Service Providing Agency section of Update 1 and Update 2</i>		from drop down list  Handwritten: Enter specific SPA name (do not write "AzEIP")
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### Highlights of Changes to the [Transition Conference Summary \(GCI-1033A\)](#)

Type of Change	Location of Change	Change	Instructions
New Field	<i>Top section</i>	I-TEAMS ID	Enter child's six-digit I-TEAMS ID
Wording	<i>Top section</i>	The purpose of the Transition Conference activities/steps have been revised and updated	Notice: read each activity/step in their entirety
Wording and Location	<i>Top section</i>	Added the word "written" before consent; Yes/No response boxes moved to the end of the sentence	Notice: ensure written consent has been obtained for each meeting participant prior to proceeding with the Transition Conference
Format, Wording	<i>Transition Conference Participants</i>	Columns revised: <ul style="list-style-type: none"> <li>● Role</li> <li>● Participant Name</li> <li>● Participant Initials</li> <li>● Contact Information (Phone/Email)</li> </ul>	Document all participants present during the Transition Conference and obtain their initials and contact information  Notice: IFSP Team Lead and School District/Public Education Agency (PEA) Representative now specified in the Role column
Wording and Location	<i>Meeting Summary</i>	Added prompt for type of information to discuss and document	Document a summary of the meeting discussion
Wording and Drop	<i>Action Steps for a</i>	Section Header changed and drop down selection	Select all Action Steps discussed during the meeting and identify

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Down Selection	<i>Smooth Transition</i>	added for Action Steps identified during the meeting	Responsible Person(s) and Date to be Completed for each  Include any additional details as needed below each Action Step
Statement Removed	<i>Page 2 lower portion of the page</i>	A referral was made to the local school district by providing the PEA Notification/Referral form	No longer applicable
Wording	<i>Page 2 lower portion of the page</i>	Added checkbox and fillable space for AzEIP IFSP Team Member(s)	Document all AzEIP IFSP Team Members requested by the parent(s) to attend the MET/Eligibility Conference and IEP meeting.
Addition	<i>Page 2 lower portion of the page</i>	Added statement: With the parent's consent, a copy of all documentation completed during the Transition Conference will be provided to all participants within 10 business days of this meeting.	Obtain parent's consent as applicable on a Consent to Share Early Intervention Records and Information (GCI-1040A) and provide the documentation to identified participants within 10 business days of the meeting.
Addition	<i>Page 2 lower portion of the page</i>	Added statement: As the parent(s) of a child who is involved with AzEIP, you have protections under the Individuals with Disabilities Education Act (IDEA). These protections are outlined in the Child and Family Rights in the Arizona Early Intervention Program (AzEIP) booklet	Notice: call parent's attention to the Child and Family Rights in the Arizona Early Intervention Program (AzEIP) booklet statement.
Addition	<i>Page 2 lower portion of the page</i>	QR Code	Scan QR Code to access Child and Family Rights in the Arizona Early Intervention Program (AzEIP) booklet (encourage families to scan, as well).