

## INDICATOR 8A: TRANSITION PLANNING MEETING (TPM) CHILD FILE REVIEW FORM AND GUIDANCE

Child's Name: \_\_\_\_\_ DOB: \_\_\_\_\_ I-TEAMS ID: \_\_\_\_\_

Service Providing Agency (SPA): \_\_\_\_\_ Region: \_\_\_\_\_

Service Coordinator: \_\_\_\_\_ Name of Person Completing File Review: \_\_\_\_\_ File Review Date: \_\_\_\_\_

AzEIP Eligibility Date: \_\_\_\_\_ Date Child is 2.3: \_\_\_\_\_ Date Child is 2.6: \_\_\_\_\_ Date Child is 2.9: \_\_\_\_\_

TPM Date: \_\_\_\_\_ PEA Opt Out Date\*: \_\_\_\_\_ PEA Sent Date\*: \_\_\_\_\_ ADE Sent Date\*: \_\_\_\_\_

***\*Enter N/A if activity did not occur.***

**Indicator 8: Children and families receive timely transition activities to support the child's transition to preschool and/or other appropriate community services by the child's third birthday.**

### Compliance Requirements

1. SPA has reviewed all documentation and determined that this record meets IDEA Part C **and** AzEIP compliance requirements.
2. Did the Transition Planning Meeting occur within the [required timelines](#) based on the age of the child at AzEIP eligibility?
3. Are transition steps and services documented on the Transition pages of the IFSP?
4. Are transition steps written on the IFSP reflected in I-TEAMS under 'Transition Steps Documented on IFSP'?
5. Did the parent provide their initials on the Transition pages of the IFSP to document that they understand the Service Coordinator will share the child and family's demographic information with the local school district and Arizona Department of Education (ADE) unless the parent opts out of this notification?
6. Did the parent provide their initials on the Transition pages of the IFSP to indicate their decision to hold a Transition Conference?

7. SPA has reviewed the data entry and confirmed that I-TEAMS matches documentation as indicated below:

I-TEAMS Transition Page	Matches	Documentation
IFSP Transition Planning Meeting Date (TPM)		Date Transition Planning Meeting Completed on the IFSP
PEA Notification Decision		Parent's PEA Notification decision documented on the IFSP Transition page
Parent's Decision on Transition Conference		Parent's Transition Conference decision documented on the IFSP Transition page
I-TEAMS IFSP Information Page	Matches	Documentation
IFSP Date		IFSP Date on the TPM IFSP

<p align="center"><b>Transition Planning Meeting (TPM) Documentation</b>  <i>It is the submitter's responsibility to confirm that all possible documentation to support compliance has been submitted through the Google Form for verification.</i></p>	
<p><b>8. Required Documentation</b></p> <ul style="list-style-type: none"> <li>Complete TPM IFSP, including transition pages</li> <li>SC Contact Log(s)</li> </ul>	<p><b>9. Supporting Documentation (<i>upload all documents that support compliance</i>)</b></p> <ul style="list-style-type: none"> <li>Written Correspondence</li> <li>Any other documents that would be helpful in verifying compliance of transition activities</li> </ul>

## AzEIP Policy and Procedure Guidance

- The Data Manager is responsible for ensuring all required activities are entered timely and accurately into the ADES data system(s) **(AzEIP Policy 2.4.7.A.)**
- Each EIP ensures that:
  - Electronic data for each eligible infant or toddler and his/her family are accurate and contained in a record
  - All required data, including new demographic, evaluation, service, and/or other required information, are entered in the ADES data system(s) within ten (10) calendar days of the activity or event
  - A written process is in place to follow-up and/or track when data is submitted or entered late; and
  - All information contained in a child's file, including data on the IFSP and other required forms, are accurate and updated timely. **(AzEIP Policy 2.4.8.A.-D.)**
- The purpose of the transition planning meeting is to develop and document a transition plan in the IFSP. The service coordinator ensures the transition plan, including transition steps and tentative timelines, is documented in the IFSP. **(AzEIP Policy 4.3.1.)**
- The transition planning meeting (TPM) is a mandatory meeting that must be completed by the end of the calendar month the child turns two years, six months and may be completed as early as the day the child turns two years, three months (also defined as nine months before the child's third birthday), if all parties agree. If held later, the TPM must be completed with the initial IFSP. **(AzEIP Policy 4.3.2)**
- During development of the transition plan, the service coordinator, family, and team discuss and document the activities, steps, and tentative timelines to support the transition of the child from AzEIP, including but not limited to:
  - Status of current vision and hearing screenings, including any additional steps needed to obtain current screenings
  - All potential preschool, community, and other options available through the child's health insurance and/or public agencies that the parent would like to explore
  - Parent's acknowledgement that their informed consent is required before information about their child and family is shared with future programs
  - Activities to prepare the child for changes in service delivery, including outcomes and services to help the child adjust to and function in a new setting
  - Parent's decision regarding PEA notification and understanding of their right to opt out of PEA notification to the school district and ADE
  - Parent's decision to hold or not hold a transition conference and who they would like invited if they would like one
  - Any other activities identified by the IFSP team to support the transition of the child. **(AzEIP Policy 4.3.3.F.1-7.)**
- The service coordinator ensures the transition activities completed at the transition planning meeting are entered into the ADES data system(s) within ten (10) calendar days of completion of the meeting. **(AzEIP Policy 4.3.3.F.7.ii.)**
- The service coordinator is responsible for ensuring each transition activity is entered in the ADES data system within ten (10) calendar days of the completion of the activity. **(AzEIP Procedure 4.1.2.B.)**
- A TPM must be held to develop and document on the IFSP the child and family's transition plan, including the steps, outcomes, and any services needed to support the child and family's transition out of AzEIP. **(AzEIP Procedure 4.2.1.)**
- The IFSP transition plan must include documentation of the following:
  - Date of the child's most recent vision screening within the past 12 months
  - Date of the child's most recent hearing screening within the past 12 months or steps that will be taken to obtain one
  - Preschool options, community resources, and options available through the child's insurance or other public agencies that may be available to the child and family upon transition out of early intervention, including steps and tentative timelines to obtain them
  - The need for the parent to provide informed consent before information about the child and family will be shared with anyone involved with the transition process
  - The family's questions, concerns, and priorities regarding transition, including any outcomes or services needed to support the child and family through the transition process
  - The parent's understanding that the service coordinator will share the child and family's demographic information with the local school district and Arizona Department of Education (ADE) unless the parent opts out of this notification
  - The parent's agreement or disagreement with holding a transition conference with the local school district to discuss possible preschool options

- If the parent would like to hold a transition conference with the school district, names of the people and/or programs they would like to attend the meeting
- Any other activities identified by the IFSP team to support the child and family's transition out of early intervention **(AzEIP Procedure 4.2.6.A.-I.)**
- The service coordinator ensures information from the Transition Planning Meeting is entered into the ADES data system within ten (10) calendar days after completion of this meeting. **(AzEIP Procedure 4.2.8.)**
- Child Eligible for AzEIP prior to 2 years 6 months old: The TPM must be held by the end of the month the child is 2 years 6 months (2.6) of age and may be held as early as the day the child is 2 years 3 months (2.3) of age if all parties agree. (AzEIP Transition Timeline)
- Child Eligible for AzEIP Between 2 years 6 months and 2 years 10 ½ months old: The TPM must be held at the initial IFSP meeting with the family. **(AzEIP Transition Timeline)**
- The TPM must meet the requirements of an IFSP meeting, and transition steps must be documented on the IFSP. **(AzEIP Transition Timeline)**
- I-TEAMS must be updated within ten (10) calendar days of completion of each transition activity, including changes in the PEA decision. **(AzEIP Transition Timeline)**

### Additional Guidance

- [IDEA Part C 303.209 Transition to preschool and other programs](#)
- [Informed Written Consent on the Individualized Family Service Plan \(IFSP\) Technical Assistance Bulletin - 12/01/2023](#)
- [Transition Technical Assistance Bulletin - 5/11/2023](#)
- [Transition AzEIP Programmatic Meeting - September 2023](#)
- [OSEP Response to Nix, March 17, 2023](#)
- [Early-Childhood-Transition-Questions-and-Answers.pdf \(Nov.28,2023\)](#)
- [AzEIP Transition Timeline](#)
- [AzEIP Transition Process Training.pptx.pdf](#)

### Acronym List

ADE: Arizona Department of Education  
 ADES: Arizona Department of Economic Security  
 AzEIP: Arizona Early Intervention Program  
 EIP: Early Intervention Program  
 IDEA: Individuals with Disabilities Education Act  
 IFSP: Individualized Family Service Plan  
 I-TEAMS: Infant - Toddler Electronic Administration & Monitoring System  
 PEA: Public Education Agency  
 SC: Service Coordinator  
 SPA: Service Providing Agency  
 TPM: Transition Planning Meeting