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

Child's Name: _____ DOB: _____ I-TEAMS ID: _____

Service Coordinator: _____ Region: _____ Service Providing Agency: _____

File Review Completed by: _____ 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 date if the above activity occurred or N/A if it did not.

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.

INDICATOR 8A: TRANSITION PLANNING MEETING (TPM)	GUIDANCE
Did the Transition Planning Meeting occur within the required timelines based on the age of the child at eligibility?	• 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. **(2022 AzEIP Policy Manual 4.3.2.A.)** • 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)**

Does the 'IFSP Transition Planning Meeting Date (TPM)' in I-TEAMS match the 'Date Transition Planning Meeting Completed' on the IFSP?	• The Data Manager is responsible for ensuring all required activities are entered timely and accurately into the ADES data system(s) **(2022 AzEIP Policy Manual 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. **(2022 AzEIP Policy Manual 2.4.8.A.-D.)**
	
	• 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. **(2022 AzEIP Procedure Manual 4.1.2.B.)**
	
	• 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. **(2022 AzEIP Procedure Manual 4.2.8.)**

INDICATOR 8A: TRANSITION PLANNING MEETING (TPM) (CONTINUED)	GUIDANCE (CONTINUED)

Are transition steps written on the IFSP reflected in I-TEAMS under 'Transition Steps Documented on IFSP'?	• 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. **(2022 AzEIP Policy Manual 4.3.1.)**
	
	• 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. **(2022 AzEIP Policy Manual 4.3.3.F.1.-7.)**
	
	• 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. **(2022 AzEIP Procedure Manual 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

INDICATOR 8A: TRANSITION PLANNING MEETING (TPM) (CONTINUED)	GUIDANCE (CONTINUED)
Are transition steps written on the IFSP reflected in I-TEAMS under 'Transition Steps Documented on IFSP'?	◦ 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 **(2022 AzEIP Procedure Manual 4.2.6.A.-I.)** • The TPM must meet the requirements of an IFSP meeting, and transition steps must be documented on the IFSP. **(AzEIP Transition Timeline)**
If transition steps are written on the IFSP, is this reflected in I-TEAMS?	• The Data Manager is responsible for ensuring all required activities are entered timely and accurately into the ADES data system(s) **(AzEIP Policy Manual 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. **(2022 AzEIP Policy Manual 2.4.8.A.-D.)** • 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. **(2022 AzEIP Policy Manual 4.3.3.F.7.ii.)** • 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. **(2022 AzEIP Procedure Manual 4.2.8.)** • 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)**

Mark the box(es) below for each type of supporting documentation used to verify compliance. At minimum, items in bold are required.

IFSP, including transition pages   Written Correspondence   Service Coordinator Notes   Other

Documentation Requirements:

• File audits must include: complete copy of IFSP, including transition pages.

• Additional documentation may include: written correspondence, SC notes, Transfer Request Form, No Contact Letter, Incident Report, Prior Written Notice (PWN).

• Date of TPM in I-TEAMS should match date on IFSP transition page and child file review form.

• IFSP transition plan must include transition steps and this should be reflected in I-TEAMS.