



Completing the Transition Activities

This guide covers how to document informal transition planning within the IFSP tab and formal transition activities with 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.



Transition

Transition Discussion

How To

Enter Transition Discussion Details on an IFSP

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 houses general transition discussions that occur at **every** IFSP meeting. *Child's transition should be discussed at **every** IFSP meeting
- The **Transition** tab is where the formal transition process starts with the development of the transition plan, recording of the transition meetings and conferences held.

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.

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The screenshot displays the EI-Hub software interface for a child's record. The breadcrumb navigation shows 'Home / Child / Edit'. The child's information is: 'First Steps ID: 65 - Spencer-Test, Robert - DOB: 6/16/2021'. The 'IFSP' tab is selected in the top navigation bar. Below the navigation bar, there are tabs for 'Child at a Glance', 'Child Info', 'Family Info', 'Funding Sources', 'Eval Info', 'Eligibility', 'IFSP', 'Services', 'Child/Family Outcomes', and 'Transition'. Under the 'IFSP' tab, there are sub-tabs for 'Transfer, Exit, & Close' and 'Document'. The main content area shows an 'IFSP' grid with a search bar, 'Add IFSP' button, and 'Excel' button. The grid has columns for IFSP Type, IFSP Status, IFSP Reason for Delay, IFSP Method, IFSP Extension Reason, IFSP Start Date, IFSP End Date, Signed Date, Linked IFSP, and Action. The first row shows 'Initial' type, 'Draft' status, and '06/26/2023' start date. The 'Action' column has 'View' and 'Edit' buttons. The grid shows 'Showing 1 to 1 of 1 entries' and navigation buttons for 'Prev', '1', and 'Next'.

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



Transition

Transition Discussion

How To

Enter Transition Discussion Details on an IFSP

Note

An asterisk (*) indicates a required field.

Step / Action

3. While in the IFSP, select the **IFSP Transition** panel. Upon selecting the **IFSP Transition** panel, the **IFSP Transition** pane populates.
4. Fill in all required fields beginning with the **Has transition been discussed with the family** field.

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The screenshot shows a software interface for entering transition discussion details. On the left is a sidebar menu with the following items: IFSP Information, IFSP Team, IFSP Meeting, Confirmation IFSP Schedule, Level of Development, Family Strengths Priorities Concerns Resources, Reasons/Indicators for Respite and/or Transportation, IFSP Ongoing Evaluations, Outcomes, IFSP Services, Natural Environments, Other Services/Resources where Family is Participating, **IFSP Transition** (highlighted), IFSP Review Notes, IFSP Parent Agreement, and Active IFSP Services Panel. The main content area contains several required fields, each marked with a red asterisk: 1. '*Has Transition been discussed with the family?' with a dropdown menu showing '-- Select --'. 2. '*Date Transition discussed with family' with a text input field. 3. '*Synopsis of family discussion' with a large text area. 4. '*Has transition to CPSE been discussed with the family?' with a dropdown menu showing '-- Select --'. 5. 'Transition to CPSE Synopsis of discussion' with a text area. 6. '*Has transition to other programs, supports and services been discussed with the family?' with a dropdown menu showing '-- Select --'. 7. 'Transition to other programs Synopsis of discussion' with a text area. 8. 'Procedures to prepare child for changes in service delivery, including steps to help the child adjust to, and function in, a new setting' with a text area. A purple 'Submit' button is located at the bottom right of the form.



Transition

Transition Plan

How To

Start a Transition Record

Note

An asterisk (*) indicates a required field.

- If the transition conference is late, the reason for the late conference must be entered.
- EI Transition Conference Date field is the date that the conference occurred. Future dates cannot be entered. The field is not required.

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
- Transition Parent Prior Written Notice

Name of Child
Aaron Aaron

*Transition Planning Begins
EI Transition Conference Date
05/30/2023

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 CPSE meeting?

Was the transition conference late?
Reason for Late Conference
Family - unresponsive/moved

Was the EI transition conference combined with the IFSP meeting?

Submit



Transition

Transition Plan

How To

Start a Transition Record

Note

An asterisk (*) indicates a required field.

- To begin a transition record and save/submit all Transition panels, the Transition Plan panel and the transition checkbox (Step 2) is required. Once checked and saved, the checkbox cannot be unchecked.
- After starting a record, the panels located within the Transition tab do not need to be completed in a specific order.
- Transition Conference due date can be found by referencing the **Eligibility and Transition Dates** panel located below the **Transition Plan** panel.
- If the transition conference is late, the reason for the late conference must be entered.**

Step / Action

- Select the **Transition** tab from within the Child's record. The **Transition Plan** panel auto-populates.
- Click the **Transition Planning Begins** checkbox (***NO transition information can be entered UNLESS the 'Transition Planning Begins' checkbox is checked**).
- Enter the **El Transition Conference Date**, if one was held. This should be the actual date the conference was held.
- Select **Yes/No** if all required meeting participants meet the EI criteria.
- Select the **EI Transition** Checkbox if an EI transition conference was held.

The screenshot shows a software interface with a navigation bar at the top containing tabs: Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition (selected), Transfer, Exit/Reopen, and Document. The main content area is titled 'Transition Plan' and features a sidebar on the left with a list of panels: 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, and Transition Parent Prior Written Notice. The main panel contains the following fields and options:

- Name of Child: Aaron Aaron
- *Transition Planning Begins
- El Transition Conference Date: 05/30/2023
- 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 CPSE meeting?
- Was the transition conference late?
- Reason for Late Conference: Family - unresponsive/moved
- Was the EI transition conference combined with the IFSP meeting?
- Submit button



Transition

Transition Plan

How To

Start a Transition Record

Note

An asterisk (*) indicates a required field.

- To start a transition plan record and make available all Transition panel, the transition checkbox (Step 3) is required. Once checked and saved, the checkbox cannot be unchecked.
- Any information entered must be saved by selecting the **Submit** button before one can move to another panel.
- After starting a record, the panels located within the Transition tab do not need to be completed in a specific order.
- Transition Conference due date can be found by referencing the **Eligibility and Transition Dates** panel located below the **Transition Plan** panel.
- If the checkbox for “Was the transition conference late” is blank, the “Reason for Late Conference” is not an editable field.

Step / Action

6. Select the ‘Was the EI transition conference combined with the CPSE Meeting’ checkbox, if applicable
7. If the transition conference was late, select the **Transition conference late** checkbox and select a Reason for the Late Conference from the **Reason for the Late Conference** dropdown
8. Select the Checkbox if the **EI Transition Conference Was Combined with the IFSP Meeting**
9. If Community-Based Options are discussed as a part of the Transition process, check the appropriate option (i.e., Head Start).
10. Upload any pertinent transition documentation.
11. Select the **Submit**.

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

Transition Parent Prior Written Notice

Name of Child
Aaron Aaron

*Transition Planning Begins

EI Transition Conference Date
05/30/2023

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 CPSE meeting?

Was the transition conference late?

Reason for Late Conference
--- Select ---

Was the EI transition conference combined with the IFSP meeting?

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)

Note

- Auto-populated dates are a feature of Case Management. This feature removes the work of manually tracking and calculating dates.

Step / Action

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

The screenshot shows a software interface with a top navigation bar containing the following tabs: Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition (highlighted), Transfer, Exit/Reopen, and Document. On the left, a sidebar menu lists several options: Transition Plan, Eligibility And Transition Dates (highlighted), 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, and Transition Parent Prior Written Notice. The main content area displays two fields: 'Child's Date of Birth' with the value '06/07/2021' and 'Transition Conference Convened no earlier than' with the value '09/07/2023'. Each field has a small edit icon to its right.



Transition

Transition Conference Notification

How To

View and Edit a Transition Conference Notification

Note

An asterisk (*) indicates a required field.

- 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. Select **Notification Date**. This date can be entered manually or selected using the calendar feature.
3. Select the **Conference Location** followed by the **Scheduled Transition Conference Date** and **Time**. The date can be entered manually or selected using the calendar feature.
4. Enter the **Service Coordinator (FRC)** and **Therapist** Information. Any service provider can be entered in the Therapist field, regardless of discipline.
5. Enter the **Local Education Agency Representative**.
6. Enter the **Head Start Representative**.
7. Enter any **Other** representatives.
8. Select **Submit**.

The screenshot shows a software interface for managing transition plans. The top navigation bar includes tabs for Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition (selected), Transfer, and Exit/Reopen. A 'Document' button is also present. The main content area is divided into a left sidebar and a main form. The sidebar contains several panels: 'Transition Plan', 'Eligibility And Transition Dates', 'Transition Conference Notification' (highlighted), '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', and 'Transition Parent Prior Written Notice'. The main form contains the following fields: '*Notification Date', 'Parent Name' (pre-filled with Allison Aaron), 'Address Number and Street' (1221 W MONROE ST), 'Address City' (DECATUR), 'Address State, and ZIP' (IN 46733-1532), 'Dear' (Allison Aaron), 'Child First Name' (Aaron), 'Child Last Name' (Aaron), '* Conference Location' (dropdown menu), '*Scheduled Transition Conference Date', '*Time', 'Service Coordinator', 'Service Coordinator Phone', 'Therapist 1', 'Therapist 2', 'Therapist 3', 'Therapist 4', '*Local Education Agency Representative', 'Head Start Representative', 'Other', and two 'Submit' buttons (one blue, one purple).



Transition

Transition Plan Members

How To

View and Enter Transition Plan Members

Note

- Only one Transition Plan member may 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.
- While you can identify transition meeting members as being both 'Invited' and 'Attended' within the **Transition Plan Member** panel, both options do not have to be selected at the same time.
- You may go back and select another option (i.e., attended) at another time or a later date.
- If a Therapist is not available for selection, please check the status of that provider within the **Services** tab.

Step / Action

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

Member Name	Transition Role	Member Phone	Member Email	Invited	Attended	Action
John Wiseman	Uncle	(206)-391-4030	jwiseman@internet.com	True	True	Edit Delete
Lidia Bartholomew	Mother	(206)-230-3918	mbart@gmail.com	True	True	Edit Delete
Test Tester	Therapist		testbox921@gmail.com	True	True	Edit Delete

Transition Meeting Members

Family Member Search: --- Select --- (selected: Lidia Bartholomew)

Therapist Search: --- Select ---

Member Name: Lidia Bartholomew

Transition Role: Mother

Member Phone: (206) -230

Member Email: mbart@gmail.com

Invited

Attended

Submit



Transition

El Services Ending Details & Post Transition Services

How To

Complete a Written Notification and Opt-Out

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 **Written Notification and Opt-Out** panel.
2. Select the **Parent/Guardian Written Notification and Opt-Out** checkboxes that apply. Complete any additional checkboxes, fields, and drop-downs that may populate as a result of your selections, as applicable.
3. Select the **Family Modified Decision** checkbox, if applicable.
4. The **Date Family Modified Decision** field is the date the FRC was notified that the family has modified their original decision as to whether the school district should be notified of the child being potentially eligible for the 3-5 (Part B) program.
5. Select the **Revocation of Written Notification** checkbox, if applicable. Enter the **Date of the Parent's Decision** and **Date of Revocation** (to revoke written notification). Both dates can be entered manually or selected using the calendar feature.
6. 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 documents types.
7. Select the **Submit** button.

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
Transition Parent Prior Written Notice

Written Notification and Opt-Out

Parent/Guardian chooses to waive the 30-calendar day opt-out period

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

Revocation of Written Notification
Date of Revocation

If yes, date notification sent

Date Family Modified Decision

*Date of Parent's decision
Date of Parent's decision

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/Revocat

Submit



Transition

EI Services Ending Details & Post Transition Services

How To

Complete a Consent for Transmittal of EIP Evaluations and Records

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 **Consent for Transmittal of EIP Evaluation and Record** panel.
2. Select the **Parent gives consent to transmit EIP records & reports to the CPSE** checkbox, if applicable. Complete any additional checkboxes, fields, and drop-downs that may populate as a result of your selections.
3. Select the **Parent/Guardian gives consent to transmit the following EIP Reports and records to the CPSE** checkbox, if applicable. Enter the **Date Transmitted**. Complete any additional checkboxes, fields, and drop-downs that populate as a result of your selections, as applicable.
4. Select the **Parent/Guardian does NOT give consent to transmit EIP records and reports to the CPSE** checkbox, if applicable. Enter the **Date of Parent's Consent**.
5. Select the **Consent for Transmittal of EIP Evaluation and Record to CPSE** checkbox, if applicable. Enter the **Consent for Transmittal of EIP Evaluations and Records to CPSE Date of Revocation**.
6. 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 documents types.
7. Select the **Submit** button.

The screenshot shows a web application interface with a navigation menu at the top containing: Child at a Glance, Child Info, Family Info, Funding Sources, Eval Info, Eligibility, IFSP, Services, Child/Family Outcomes, Transition (highlighted), Transfer, Exit/Reopen, and Document. On the left, a sidebar menu lists: Transition Plan, Eligibility And Transition Dates, Transition Conference Notification, Transition Plan Members, Consent for Transmittal of EIP Evaluations and Records (highlighted), Consent to Convene a Transition Conference, Written Notification and OptOut, Transition Planning Requirements and Activities, and Transition Parent Prior Written Notice. The main content area is titled 'Consent for Transmittal of EIP Evaluations and Records' and contains the following elements:

- 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:
- Date Transmitted:
- *Date of Parent's Consent:
- 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:
-
-

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.

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. Complete any additional checkboxes, fields, and drop-downs that may populate as a result of your selections, as applicable. Enter a **Date of Parent's Decision**. This date can be entered manually or selected using the calendar feature.
4. Select the **Revocation to Convene a Transition Conference** checkbox, if applicable. Enter a **Transition Conference Date of Revocation** (This date can be entered manually or selected using the calendar feature).
5. 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 documents types.
6. Select the **Submit** button.

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

Transition Parent Prior Written Notice

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

Revocation to Convene a Transition Conference

Transition Conference Date of Revocation

Upload Consents/Notifications/Revocations

Submit



Thank you!



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Revision History

Version Number	Release Date	Author	Revision Summary
v.1	3.15.2022	Matthew O'Brien	First Draft Release
v.2	6.18.2022	Courtney Pittman	Second Draft Release
v.3	7.29.2022	Courtney Pittman	Final Draft Release
v.4	9.22.2022	Courtney Pittman	Post-Final Review
v.5	10.4.2022	Courtney Pittman	Post-Post Final Review
v.6	9.11. 2023	Courtney Pittman	

