

Early Intervention Services in Montgomery County

Transition Procedures from the Infant-Toddler to Preschool Program

The principal goal in creating a successful transition plan includes the collaboration of Montgomery County Department of Developmental Disabilities and Behavioral Health Office of Early Intervention Infant Toddler (EI IT) Program and the Montgomery County Intermediate Unit (MCIU) Early Intervention/Preschool Program. These procedures have been developed to ensure maximum coordination, cooperation, and communication among the member agencies and parents to provide the most effective set of services and supports to eligible infants, toddlers, and young children and their families. The transition process occurs between Montgomery County Early Intervention Infant Toddler Program and the MCIU Early Intervention/Preschool program. For children living in Montgomery County but residing in the Boyertown SD, the EI IT program makes arrangements with Berks County IU for transition planning. This may also apply to children living in the Spring Ford Area SD, Upper Perkiomen SD, and the Souderton SD where collaboration with the appropriate Infant/Toddler program will occur.

Teamwork is an essential ingredient for the success of a child transitioning. We believe that:

- Transition is a time of change for families and their children
- A smooth transition occurs when there is collaboration and sharing of information between the programs and the family
- Parents are encouraged to participate and support this planning process.
- When families have adequate time to prepare and explore these changes, they can fully participate in the preschool transition process.
- Infant Toddler Program Providers should encourage the parent/caregiver to share current information, thoughts and concerns regarding their child throughout the transition process.

All of the following procedures are based on state or federal guidelines

Infant/Toddler Service Coordination

PROCEDURE	PERSONNEL	TIME FRAME
1. Identify all potentially eligible children who will turn 3 between July 1 and June 30. Send transition directory information to the IU/EI Administration. Infant/Toddler program will ensure that school district information is included in Pelican demographics	BEIS Upload Infant Toddler Intake Coordinator (at intake)	At least once per year. Quarterly upload into DocuShare. If the child moves or re-locates, the Infant/Toddler Service Coordinator will make this change at the time of move.

2. Preschool will provide 6 months of transition meeting dates to the Infant Toddler program. Dates will reflect varied days during the week.	Infant Toddler Administration Preschool Administration	Every six months (July-Dec; Jan-June). Dates will be sent to the county by May 1 and November 1 identifying the dates for meetings
3. Infant /Toddler Service Coordinator will obtain a signed release to refer the child for transition to the IU. Infant/Toddler Transition Coordinator checks IFSP for documentation of signed release. If release has been signed records are sent to the IU via PELICAN. If release has not been signed, the Transition Coordinator will work with the Service Coordinator to obtain a signed release and update the records accordingly.	Infant Toddler Service Coordinator Infant Toddler Transition Coordinator	As close to 2 nd birthday as possible
4. Infant/Toddler Transition Coordinator calls parent to schedule transition meeting. (Child is entered into data base and invitation is sent)	Infant Toddler Intake Coordinator Parent/Caregiver	Process begins when child reaches 2 years 3 months
5. Transition Meeting and all materials should be shared in the first language of the family. Infant/Toddler Transition Coordinator will ensure an interpreter/translator is available for the transition meeting.	Infant Toddler Intake Coordinator Infant Toddler Service Coordinator	In scheduling transition meeting
6. Transition plan is developed during an IFSP/team meeting or a Service Coordination monitor meeting.	Infant Toddler Service Coordinator Parent/Caregiver Provider	Process begins when child reaches 2 years 3 months and continues until third birthday

<p>7. When the transition schedule is filled for the scheduled day, the completed schedule is sent to the MCIU. The Infant/Toddler Transition Coordinator will send copies of the invitation letters and confirmation letters to the Preschool Program.</p>	<p>Infant Toddler Transition Coordinator</p>	<p>Faxed as soon as transition schedule is filled</p>
<p>8. Team members participate in the scheduled transition planning meetings as per the transition meeting schedule. For families who communicate in languages other than English, an interpreter/translator will be provided.</p>	<p>Infant Toddler Service Coordinator Parent/Caregiver MCIU Case Manager</p>	<p>Date and time of the scheduled Transition Meeting</p>
<p>9. Should any changes to the IFSP be anticipated between the transition meetings and when the toddler transitions, the Infant/Toddler Service Coordinator will contact the MCIU case manager by phone or email to discuss the changes or any new diagnosis, or pending evaluations, including sharing of any additional specialist the child may be seeing.</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager</p>	<p>As soon as possible</p>
<p>10. If/when the child no longer meets eligibility criteria and the child is exited from early intervention; the Infant/Toddler Service Coordinator will copy the MCIU case manager on their closing letter. If/when a child enters tracking or the family chooses to end the referral to MCIU, or if the child's address changes, or the child no longer lives within one of the Montgomery County school districts, the SC will contact the assigned Preschool Case manager to notify them of the change.</p>	<p>Infant /Toddler Service Coordinator Infant/Toddler Transition Coordinator MCIU Case Manager</p>	<p>Ongoing</p>

<p>11. For children entering EI at 2.6, during the initial intake call, the intake coordinator will begin discussing the transition process while scheduling the MDE. The Infant/Toddler Intake Coordinator will share with the family that should their child be eligible, we ask they be available for a 30-minute phone conference within 15 calendar days after the evaluation in order to ensure timely and smooth transition.</p>	<p>Infant Toddler Intake Coordinator Infant Toddler Transition Coordinator Infant Toddler Service Coordinator</p>	<p>At point of intake and at the MDE if the child qualifies for EI services.</p>
<p>12. If the child is found eligible at the MDE (2.6-2.8), The Infant/Toddler Service Coordinator discusses a tentative date and time for the Transition Meeting with the family to confirm their availability. The family is informed that the Infant Toddler Transition Coordinator will call to confirm. Transition Outcomes are developed. The plan is updated quarterly and activities are added when needed.</p>	<p>Infant Toddler Intake Coordinator Infant Toddler Transition Coordinator Infant Toddler Service Coordinator</p>	<p>At point of intake and at the MDE if the child qualifies</p>
<p>13. Late Referrals-For children entering EI Infant/Toddler (46 days to 2.9), a private transition meeting outside of the Transition schedule will be scheduled with the family. An email is sent from the Infant Toddler Transition Coordinator to the appropriate MCIU Case Manager. The email will include the child's name, MDE date and date of birth. The Infant Toddler Intake Coordinator will schedule the transition meeting on a transition meeting day at a convenient time for parent/caregiver and MCIU Case Manager. If the parent is unavailable on a transition meeting day, a private meeting will be scheduled with the parent after the Infant Toddler Transition Coordinator confirms</p>	<p>Infant Toddler Service Coordinator Infant Toddler Transition Coordinator Infant Toddler Supervisors MCIU Case Manager MCIU Early Intervention/Preschool Administrators</p>	<p>As soon as possible following the initial MDE</p>

<p>the availability of the MCIU Case Manager.</p>		
<p>14. Late Referrals-Children being referred to Early Intervention 45 days or less before their third birthday will be referred directly to the Montgomery County Intermediate Unit.</p>	<p>Infant Toddler Intake coordinator MCIU Case Manager</p>	<p>45 days or less before the child's third birthday</p>
<p>15. For a child who is not found eligible for preschool special education, the MCIU Case Manager will be in touch with the Infant Toddler Service Coordinator to communicate this information. The Infant Toddler Service Coordinator will then discuss strategies and activities with the parents to help the child transition into the community. This update will be added to the child's transition plan.</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager Parent/Caregiver</p>	<p>Following the completion of the MCIU Evaluation Report</p>
<p>16. For a child who is found eligible for preschool special education, the MCIU Case Manager will e-mail or phone the Infant Toddler Service Coordinator to communicate this information. The Infant Toddler Service Coordinator will support the family as they finalize the transition process.</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager Parent/Caregiver</p>	<p>Before the child's third birthday</p>
<p>17. One to two weeks before the child turns three, the Infant Toddler Service Coordinator will contact the family to check in and provide closure before the transition.</p>	<p>Infant Toddler Service Coordinator Parent/Caregiver</p>	<p>At least 1 week before the child's 3rd birthday</p>

Infant Toddler Program Provider Responsibilities

Procedure	Personnel	Timeframe
1. All Infant Toddler providers are expected to fully understand current transition process and procedures.	Lead Agencies (Infant/Toddler & Preschool) Provider Agency Administrators	Annual Training Requirement New hire requirement New materials issued annually by June 15 of each year
2. Infant Toddler providers will receive approved training and materials annually on Transition. Providers will receive resources to support understanding of this process.	Lead Agencies (Infant/Toddler & Preschool) Provider Agency Administrators	Annual Training Requirement New hire requirement New materials issued annually by June 15 of each year
3. Infant Toddler providers will encourage the family to fully participate in the transition process. This includes releasing information, attending the transition meeting, returning the permission to evaluate in a timely fashion, and assisting in directing the family to the MCIU case manager or service coordinator with questions.	Appropriate providers Infant Toddler Service Coordinator	Ongoing
4. If a team member speaks the language of the family, they are asked to support the parent in participating in the transition meeting by serving as translator and interpreter.	Infant Toddler Team Members Parent/Caregiver	While scheduling the transition meeting, during the transition meeting and ongoing as needed
5. The provider will help the family to complete and return the permission to evaluate following the transition meeting.	Parent/Caregiver Infant Toddler Team Members	Following the transition meeting
6. Following the transition meeting, providers will encourage families to share any updates or new information about the child with both the child's Infant Toddler	Parent/Caregiver Infant Toddler Team Members Infant Toddler Service Coordinator MCIU Case Manager	Following the transition meeting and ongoing until the third birthday

<p>service coordinator as well as the child's MCIU case manager. For example, if the child was seen by a specialist or private therapist, the provider should encourage the family to share these records with the Infant Toddler service coordinator and MCIU case manager.</p>		
<p>7. Providers should share ongoing information and strategies to Infant Toddler service coordinator for the development of the transition plan.</p>	<p>Appropriate providers Infant Toddler Service Coordinator</p>	<p>2years 3 months, 2years 6 months, 2years 9 months</p>
<p>8. In preparation for the evaluation, providers will encourage parent/caregiver to attend and share current information regarding strengths, needs and strategies with the MCIU evaluation team. The provider will also support families in sharing information regarding assistive technology when applicable.</p>	<p>Appropriate providers Parent/Caregiver MCIU Evaluation Team</p>	<p>Ongoing following the transition meeting and until the third birthday</p>
<p>9. When the evaluation report is complete, the provider should encourage and support parents as the parent/caregiver reviews the evaluation report to assure it reflects all areas of concerns.</p>	<p>Appropriate providers Parent/Caregiver MCIU Evaluation Team</p>	<p>Ongoing following the evaluation and until the third birthday</p>
<p>10. As the family prepares for the IEP meeting, the provider should also discuss the importance of parent participation in the IEP process.</p>	<p>Appropriate providers Parent/Caregiver MCIU Evaluation Team</p>	<p>Ongoing following the evaluation and until the third birthday</p>
<p>11. If the family is expressing concerns or raising questions about the overall transition process, content of evaluation and/or proposed IEP content and services, the Provider will assist the family in sharing their concerns with the appropriate individuals at the MCIU.</p>	<p>Appropriate providers Parent/Caregiver MCIU Case Manager</p>	<p>Ongoing following the evaluation and until the third birthday</p>

12. The provider should encourage parents to return required forms, including the NOREP.	Appropriate providers Parent/Caregiver MCIU Case Manager	Ongoing following the IEP meeting and until the third birthday
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* As part of annual training requirements are to be aware of updated transition processes

Parent/Caregiver Participation

Procedure	Personnel	Timeframe
1. If families chose to have their child participate in the transition to preschool, parents will need to provide permission to refer to the IU by signing the release of information form.	Parents/Caregivers Infant Toddler Service Coordinators	The meeting with the child's service coordinator closest to the child's 2 nd birthday or upon determination of eligibility for children over the age of 2.
2. Parents play a key role in the transition process. It's important to attend the scheduled transition planning meeting and in the rare instance the appointment needs to be rescheduled, the meeting will be rescheduled as soon as possible. For families who communicate in languages other than English, an interpreter/ translator will be provided to you to ensure your full participation in the meeting.	Parents/Caregivers Infant Toddler Transition Coordinator Infant Toddler Service Coordinator Providers	As per transition meeting schedule
3. Following the transition meeting, any updates or new information about your child should be shared with both the child's service coordinator as well as the child's case manager. For example, if the child was seen by a specialist or private therapist, it is important to share these records with the service coordinator and case manager.	Parents/Caregivers Infant Toddler Service Coordinator MCIU Case Manager Providers	Ongoing throughout the transition process
4. The Permission to Evaluate should be returned to the Case Manager as soon as possible following the transition meeting. This document provides consent to proceed	Parents/Caregivers MCIU Case Manager Infant Toddler Service Coordinator	After the transition meeting

<p>with transition evaluations. The Case Manager will ask you how the family wants to receive this form (Permission to Evaluate) at the transition meeting. The form can be sent by email, fax or US Mail along with your Procedural Safeguards. Once the PTE is reviewed and signed by the family it is to be returned to the MCIU as soon as possible. It can be scanned, faxed or sent through US Mail.</p>		
<p>5. Once the PTE is received by the MCIU, the evaluation must be completed and report shared with the family within 60 days.</p>	<p>Parents/Caregivers Case Manager</p>	<p>When PTE is received by MCIU, the timelines begin and the ER is due in 60 days.</p>
<p>6. Families actively participate in the evaluation process by attending scheduled evaluations, sharing pertinent health history, diagnostic information, hearing and vision information as well as current developmental information and asking questions and raising any new concerns about their child for the development of the Evaluation Report.</p>	<p>Parents/Caregivers MCIU Evaluation Team MCIU Case Manager</p>	<p>During the evaluation process</p>
<p>7. Following the receipt of the Evaluation Report, the family will be invited to attend an IEP meeting. Active participation in this planning meeting is essential in determining an appropriate program for their child based on their child's educational needs. This meeting builds a program of services, location, and frequency and duration. Open communication is essential for collaboration and allows the team to develop an appropriate preschool early intervention /special education program to meet your child's needs.</p>	<p>IEP Team Parents/Caregivers MCIU Case Manager</p>	<p>Within 30 days of receiving the Evaluation Report</p>

<p>8. All members of the transition team will support and assist families in completing the documents needed for transition. However, if after repeated attempts (e.g., phone calls, emails, letters, and/or home or community visits), the permission to evaluate is not received by the MCIU 60 calendar days prior to the child's third birthday, the MCIU will send a certified letter indicating that the transition process cannot continue without the return of the signed Permission to Evaluate (PTE). This process can re-start upon receipt of the signed PTE. The receipt of the signed PTE will comply with all state and federal guidelines and the Evaluation Report will be issued within 60 days of the returned PTE. The MCIU will work diligently to ensure services are in place by the third birthday. However, delays in completing the critical steps in the transition process will result in infant/toddler services ending at the third birthday and may result in a lapse in service until the process is complete and an IEP is developed.</p>	<p>Parents/Caregivers MCIU Case Manager Infant Toddler Service Coordinator Providers</p>	<p>60 days before the child's 3rd Birthday</p>
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MCIU Case Manager Responsibilities

Procedure	Personnel	Timeframe
<p>1. The Case Manager will participate in transition phone conference along with SC from Infant/toddler program. Discuss transition process (following transition outlines and guidelines). (See Attached)</p>	<p>Infant Toddler Service Coordinator Parent/Caregiver MCIU Case Manager</p>	<p>At least 6 months before the child's third birthday</p>

<p>2. The Case Manager will begin intake process by completing a phone interview and reviewing strengths, needs and concerns expressed by the family. Gather information via Child and Family Profile and Teacher/Caregiver Questionnaire and enter this information into Pelican in the Evaluation Report.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	<p>At intake or as soon as possible following the transition meeting</p>
<p>3. MCIU Case Manager will work with the family and Service Coordinator in determining the need for evaluation; develop Permission to Evaluate in the families' native language. Email or mail the PTE to family along with procedural safeguards. Inform the family to sign the Permission to Evaluate and return the permission to assigned case manager as soon as possible. Provide contact information to family including email and phone. Review timeline regarding scheduling (see timelines for scheduling evaluations). Document date PTE is sent in File maker.</p>	<p>MCIU Case Manager Parent/Caregiver Provider</p>	<p>At intake or as soon as possible following the transition meeting</p>
<p>4. MCIU Case Manager will track return of the PTE and/or contact the Service Coordinator for support in returning PTE. Begin communications with Service Coordinator Supervisor (cc in any email)</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager Infant Toddler Service Coordinator Supervisor Provider Parent/Caregiver</p>	<p>Ongoing following the transition meeting</p>
<p>5. Case Manager submits returned PTE to the scheduling secretary along with completed scheduling sheet (green form). Include type of evaluations, location for evaluation, and referral for additional evaluations when needed (e.g., vision, hearing, psych, FBA). Case Manager will also indicate if an interpreter/translator is needed for the evaluation.</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager Parent Scheduling Secretary</p>	<p>Immediately following the receipt of the PTE</p>

<p>6. Case Manager will update internal database (e.g., Filemaker) to include the date the PTE has been received by MCIU and the date it was given to the scheduling secretary. The Case Manager will contact the family via email and/or phone to indicate receipt of signed permission to evaluate and review the next steps (e.g., being contacted by the scheduling secretary for appointments within 2-3 business days). Review with the family who to contact if they have concerns.</p>	<p>MCIU Case Manager Parent/Caregiver MCIU Scheduling Secretary</p>	<p>Within 24 hours of receipt of the signed PTE</p>
<p>7. Scheduling secretary will reach out to the family within 48 hours of receiving the referral sheet to schedule the child for evaluations. Scheduling secretary will ensure that a translator/interpreter is available for the evaluations when necessary. Scheduling secretary will send out a confirmation letter and packet with date, time and location of appointment and directions.</p>	<p>MCIU Case Manager Parent/Caregiver MCIU Scheduling Secretary</p>	<p>Within 48 hours of receipt of referral form</p>
<p>8. Case Manager helps ensure the family attends scheduled evaluation appointments and follows up if there are cancellations or the family is unable to attend the scheduled appointment.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	
<p>9. Case Manager ensure the evaluation team receives all the information to prepare for the evaluations (e.g., sharing parental concerns, providing any recent updates and outside reports for review and consideration)</p>	<p>MCIU Case Manager MCIU Evaluation Team</p>	<p>Before scheduled evaluation appointments</p>
<p>10. Case Manager (evaluator) reaches out to the family when the ER is completed and offers to review results with the family.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	<p>Upon completion of the ER</p>

<p>11. Case Manager reviews evaluation report and coordinates IEP recommendations from evaluative team.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	<p>Within 60 days of the permission to evaluate being received.</p>
<p>12. If a child is not eligible for preschool special education, the Case Manager will send an email to the child's service coordinator informing them the child was not found eligible. The SC will be in touch with the family as well to work on a plan to transition to the community.</p>	<p>Infant Toddler Service Coordinator MCIU Case Manager Parent/Caregiver</p>	<p>Within 60 days of the permission to evaluate being received.</p> <p>Case Manager to email Service Coordinator within 48 hours of sending out the DNQ (does not qualify) ER.</p>
<p>13. Case Manager will work with the family to schedule IEP meeting within 30 days of receiving the ER. Case Manager will work with the family to develop IEP invitation; waiver (when needed) and send to family in advance of meeting (refer to procedural timelines). Case Manager will also send the Procedural Safeguards/Parent Rights to the family.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	<p>Contact the family within 3-5 days of receiving the Evaluation Report to identify dates/times for IEP meeting.</p> <p>IEP meeting will be scheduled within 30 days of receipt of the ER.</p>
<p>14. The evaluation team and case manager will develop a proposed IEP draft in advance of the IEP meeting. Follow procedures to ensure there is a room available and all team members are informed of meeting location, date and time. The MCIU Case Manager will send Outlook invitation for MCIU evaluators.</p>	<p>MCIU Case Manager Parent/Caregiver</p>	<p>Within 10 days of receipt of the ER</p>
<p>15. The MCIU Case Manager will serve as facilitator of the IEP meeting and will coordinate the meeting. Following the IEP meeting, develop a NOREP and issue proposed IEP, NOREP and Procedural Safeguards to the family within 5 days of IEP meeting.</p>	<p>MCIU Case Manager Parent/Caregiver IEP Team</p>	<p>Within 30 days of receipt of the ER. NOREP issued within 5 days of the IEP meeting</p>

<p>16. The MCIU Case Manager will track the return of the NOREP and submit for processing. When the MCIU Case Manager issues the NOREP and IEP to the parent/caregiver, the MCIU Case Manager will send an email to the child's service coordinator informing them that the IEP process has been completed.</p>	<p>MCIU Case Manager Parent/Caregiver Infant Toddler Service Coordinator</p>	<p>Email from CM to SC within 5 days of the IEP meeting</p>
<p>17. The MCIU Case Manager will work with the family to ensure the services are in place on the child's third birthday. MCIU Case Manager will also review with the family who their new point of contact will be now that the child is 3 (e.g., classroom teacher, ongoing case manager or itinerant staff).</p>	<p>MCIU Case Manager Parent/Caregiver Infant Toddler Service Coordinator Infant Toddler Service Providers</p>	<p>By the child's third birthday</p>